

Urban Growth Management in Penrith Stage 2: Planning for the Needs of Existing and Future Communities in Penrith - Full Report

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Urban Growth Management in Penrith Stage 2

Planning for the Needs of Existing and Future Communities in Penrith

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TABLE OF CONTENTS

1	INTRODUCTION	3
PART 1		5
URBAN GROWTH MANAGEMENT IN PENRITH: MODELLING THE SOCIAL IMPACTS OF DEVELOPMENT.....		5
1.1	INTRODUCTION	5
1.2	BASE CASE DATA	7
1.3	SCENARIO 1: THE BASE CASE – DWELLING, HOUSEHOLD, TENURE AND INCOME PROFILES BASED ON ABS HOUSEHOLD PROJECTIONS TO 2019	11
1.4	SCENARIO 2: DWELLING, HOUSEHOLD, TENURE AND INCOME PROFILES BASED ON HISTORIC HOUSEHOLD CHANGE PROJECTIONS	15
1.5	SCENARIO 3: SUBURB LEVEL PROJECTIONS BASED ON RECENT DEVELOPMENT APPROVAL TRENDS	19
1.6	SCENARIO 4: PENRITH COUNCIL CURRENT DWELLING ESTIMATES FOR URBAN RELEASE AREAS	37
1.7	SCENARIO 5 – SENSITIVITY TESTING	42
	SCENARIO 5A: 50 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 50 PER CENT ARE MULTI-UNIT DWELLINGS.....	42
	SCENARIO 5B: 40 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 60 PER CENT ARE MULTI-UNIT DWELLINGS.....	45
	SCENARIO 5C: 60 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 40 PER CENT ARE MULTI-UNIT DWELLINGS.....	48
1.8	PART 1: SUMMARY AND CONCLUSIONS.....	53
	APPENDIX 1: BASE CASE DATA TABLES	58
PART 2		60
THE SOCIO-ECONOMIC CONSEQUENCES OF ALTERNATIVE HOUSING POLICIES IN OLDER HOUSING AREAS		60
2.1	INTRODUCTION	60
2.2	RESIDENTIAL LAND USE SURVEY	60
2.3	ANALYSIS OF THE FUTURE SOCIAL PROFILE FOR OXLEY PARK AND SOUTH PENRITH.....	71
2.4	VISUALISATION OF URBAN RENEWAL	83
2.5	WHAT WILL HAPPEN TO OLDER HOUSING AREAS WITHOUT URBAN RENEWAL?	107
2.6	WHO LIVES IN MULTI-UNIT HOUSING?	111
2.7	A SOCIO-ECONOMIC PROFILE OF INDIVIDUALS WHO MOVED INTO MULTI-UNIT DWELLINGS IN PENRITH BETWEEN 1996 AND 2001	125
2.8	WHERE DID PEOPLE MOVING INTO MULTI-UNIT HOUSING COME FROM?	135
2.9	SOCIO-ECONOMIC PROFILE OF PERSONS WHO MOVED INTO A MULTI-UNIT DWELLING IN PENRITH BY PREVIOUS LOCALITY.....	139
2.10	PART 2: SUMMARY AND CONCLUSIONS.....	151

1 INTRODUCTION

This report presents the findings of a two-part study that has focused on aspects of the potential for residential growth in Penrith. The research was commissioned by Penrith Council in response to a set of questions that were derived from Council's review of the *Penrith Urban Growth Management Report* delivered by the authors to Council in late 2003¹.

The report will assist in the development of Council's response to current proposals from the NSW Department of Infrastructure Planning and Natural Resources that will lead to further substantial growth in residential housing in Penrith over the next thirty years accompanied by a significant increase in the number of higher density housing. The findings will also inform the current review of the Residential Strategy for Penrith.

In particular, Council identified six questions it was seeking to address in the research:

1. What is the emerging community profile of Penrith over the next 20 years and what will be their needs in terms of housing, type and location?
2. What will be the emerging role of our "middle aged" and older housing areas (for example, South Penrith and Oxley Park) and what are the social and economic consequences of alternative housing policies for these areas?
3. What will happen to our older established residential areas in terms of continuing loss of population if there is no urban renewal stimulated by infill housing opportunities?
4. As the stock of dwellings within multi-unit housing continues to be developed, there will be a trend for a proportion of that housing to be used increasingly for rental accommodation. What will be the social consequences of this trend and how should it be best managed?
5. What is needed to provide for a diverse community, particularly in terms of adaptable and affordable housing, providing for older people and people with disabilities and lifestyle needs (for example, the "creative classes")?
6. What are the likely social implications (beyond housing need) of an emerging and diverse household mix for Penrith?

In the event, the agreed research project addressed only questions 1 to 4, with the remaining questions deferred to later research. However, some mention of these issues will be made in the conclusions of this report.

¹ Randolph, B. and Holloway, D. (2003) *Urban Growth Management in Penrith*, Urban Frontiers Program, University of Western Sydney.

The research for this report was conducted in two stages. The first covers the analysis of Question 1 above. This report was initially forward to Council in October 2004² and is included in full in Part 1 of this report. The second stage of the research covering Questions 2 to 4 was completed in May 2005 and forms the remainder of this report in Part 2.

Part 2 of the report therefore explores the future role of older suburbs under current the zoning regime with a view to establishing what might be the outcome for these areas if redevelopment continues on current trends. As indicated in Question 2, we selected South Penrith and Oxley Park as case study areas to both explore their current housing market structure and to then project forward what redevelopment of 30% of current house blocks would result in, both socially and physically. From this we have been able to address the issues raised in Questions 2 to 4.

An additional analysis, to give the context for Question 2, projected forward current population and household trends to assess what the outcome would be if no further renewal was undertaken, assuming current trends in population numbers.

² Randolph, B. and Holloway, D. (2004) *Urban Growth Management in Penrith Stage 2 – Modelling the Social Impacts of Development*, Faculty of the Built Environment, University of New South Wales.

PART 1

1 URBAN GROWTH MANAGEMENT IN PENRITH: MODELLING THE SOCIAL IMPACTS OF DEVELOPMENT

1.1 INTRODUCTION

Part 1 of this report presents a series of scenarios that aim to assess the impact of various development targets on the social profile of Penrith in the next two decades. The research was commissioned by Council to assist in a better understanding of the outcomes for Penrith of the likely new development and redevelopment that will be needed to meet population growth targets and State planning policies over this period.

While much of the emphasis in the past has been on getting the numbers of new dwellings that would meet planning targets, the onset of urban consolidation in the area has meant that a new approaches to managing the likely outcomes of this relatively new form of development for Penrith will be needed. This is especially true if the mistakes evident in other Sydney local government areas are to be avoided, and the best housing opportunities are to be made available to Penrith's residents in the process.

While the scenario outcomes discussed below are of course speculative at best, being based on a range of assumptions that may bear more or less approximation to what really will happen over the next two decades, the exercise nevertheless offers an opportunity for Council to ask the question: what will be the outcome of the next twenty years of development activity on Penrith's citizens? The basic thesis being tested here is that given that different dwelling types are characterised by different social profiles (measured here in terms of household type, tenure and household income), then changing the dwelling mix in Penrith will have repercussions on the social mix of the population. This is what the scenarios tested below set out to do.

Part 1 follows a simple structure. First, a short description of the household, tenure and dwelling profile of the four main dwelling types in Penrith in 2001 is presented. These data represent the basic information used to calibrate the model for predicting social outcomes of the different dwelling mixes predicted from the seven scenarios. Seven scenarios were then tested in turn, based on a variety of projection approaches and mixes of separate houses and multi-unit (villa/townhouse and flats) development. The Base Case (Scenario 1) uses the ABS's household projections for Penrith to 2019 and the prevailing household, tenure and income profile of the four main dwelling types in 2001 to predict the likely social profile of Penrith by 2019. The following scenarios use other projection methods and assumptions to test the social impacts of a range of possible dwelling outcomes. These are explained in the text. The main findings are summarised in the final section and conclusions drawn.

It should be stressed that the analysis is not offered to justify or reject current planning policy towards either greenfield development or urban renewal and densification policies in Penrith. Indeed, it is highly likely that none of the scenarios tested will actual eventuate in reality. Rather, it is offered to provide a starting point for a more informed discussion on the preferred outcomes of the development that

will need to be managed over the next 20 years. This development is predicted to be as large as, if not larger, than the pace of development over the previous two decades, driven primarily both by natural growth from within Penrith and an aging and fragmenting household structure.

Good information, monitoring and modelling of future development outcomes will be needed to successfully manage this growth. Most importantly, while the previous growth of Penrith was largely based on straightforward suburban expansion into new release areas, the next two decades will see a significant intensification of activity to renew and redevelop housing in the older residential areas of Penrith, as well as in the commercial centres. This is a relatively new phenomenon for Penrith (especially in terms of scale) and one that will require new policies to obtain the best outcome for Penrith. This report offers a step in developing these policies.

1.2 BASE CASE DATA

The first step in the modelling process is to establish the base case. To do this, we have used 2001 Census data to describe the prevailing dwelling profile for Penrith. This profile forms the basis of the projection modelling. Base data is presented in this chapter and further percentage tables are presented in Appendix 1.

Table 1.1a presents the data for household type by dwelling type for the Penrith local government area (LGA) in 2001. At this time there were 57,249 occupied dwellings in Penrith. Of these 48,813 were separate houses (85 per cent), 3,990 semi detached dwellings (7 per cent) and 3,542 flats (6 per cent). The rest were classified as 'other' dwellings. Less than one per cent of the stock is currently in the form of high rise flats (over four storeys).

The predominant mix is of separate houses with couple families, which accounted for 42 per cent of all dwellings. Medium and higher density housing was much more diverse in terms of household profile. Lone persons and lone parents accounted for half those living in semi detached homes. Flats, on the other hand, were dominated by lone person households. Very few households with children lived in flats, and two thirds of these are lone parents.

Turning to the tenure profile of each dwelling type, Table 1.1b and Figure 1.1b show that while separate houses were overwhelmingly fully owned or being purchased, semi-detached houses and flats were much more likely to be rented. In all, while 17 per cent of separate houses were rented, as many as 67 per cent of semi-detached houses and 63 per cent of flats were rented. Half (49 per cent) of all semis and flats were privately rented. Having said that, the majority of rented homes were separate houses.

Table 1.1c and Figure 1.1c present the income profile of each dwelling type. The medium and higher density market caters primarily for lower income groups. While 54 per cent of households in separate houses had incomes of \$800 per week or more, only 31 per cent of those in semis and 18 per cent of households in flats had this level of income. In contrast, 28 per cent of households in semis and flats had incomes below \$400 per week, compared to 11 per cent of those living in separate houses.

This analysis shows that medium and high density housing in Penrith caters for a distinctive housing market. Single people and single parents predominate, while couples with children, the dominant household type in Penrith, account for only approximately one in ten households in higher density housing. Households in semis and flats are predominantly renters (and half rent privately), and are a disproportionately concentrated in the lower income categories.

It is noted that, given the current dwelling mix in Penrith, only a minority of smaller households actually lived in smaller dwelling types. Only 10 per cent of childless couples lived in semi-detached houses or flats, while the proportion only increases to just over a third (38 per cent) of lone person households. It will take a major shift in the dwelling profile of Penrith to significantly change this situation.

Table 1.1a: Household Type by Dwelling Type in Penrith, 2001 (Totals)

Absolute totals	Separate Houses	Semi Detached Dwellings	Flats in a block of less than 4 storeys	Flats in a block of 4 or more storeys	Other/Not Stated	<i>Total</i>
Couple family with children	24,008	658	248	20	209	25,143
Couple family without children	10,765	663	424	23	160	12,035
One parent family	6,460	904	409	46	83	7,902
Lone person households	5,714	1,243	1,757	135	320	9,169
Other	1,866	522	455	25	132	3,000
Total	48,813	3,990	3,293	249	904	57,249

Table 1.1b: Tenure by Dwelling Type in Penrith, 2001 (Totals)

	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Fully Owned	17,297	497	504	231	18,529
Being Purchased	20,236	469	271	53	21,029
Rented from State Housing Authority	1,322	706	508	0	2,536
Rented from Other Sources	7,057	1,951	1,738	391	11,137
Other Tenure	913	112	182	108	1,315
Not Stated	1,988	256	338	121	2,703
Total	48,813	3,990	3,542	904	57,249

Table 1.1c: Weekly Household Income by Dwelling Type in Penrith, 2001 (Totals)

	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Less than \$400	5,282	907	1,169	211	7,569
\$400-\$599	4,231	476	508	103	5,318
\$600-\$799	4,540	453	421	70	5,483
\$800-\$1,199	9,329	619	411	101	10,460
\$1,200-\$1,999	12,398	524	194	110	13,226
\$2,000 or more	4,837	106	26	40	5,009
Not Stated	8,196	905	814	269	10,184
Total	48,813	3,990	3,542	904	57,249

Figure 1.1a: Dwelling type by household type, Penrith 2001

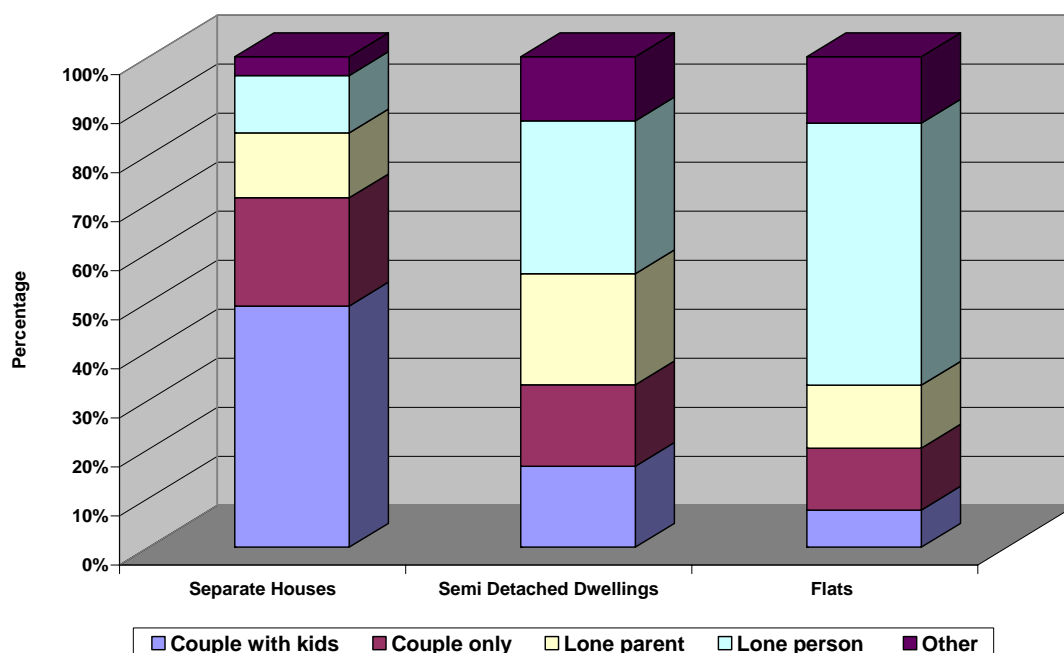


Figure 1.1b: Dwelling type by tenure, Penrith 2001

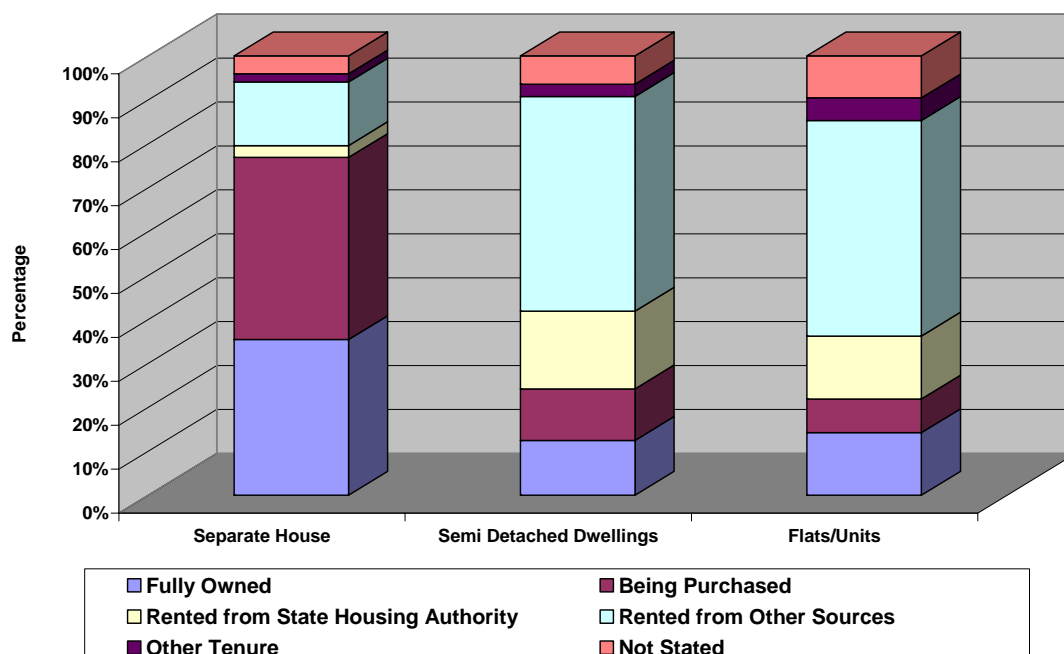
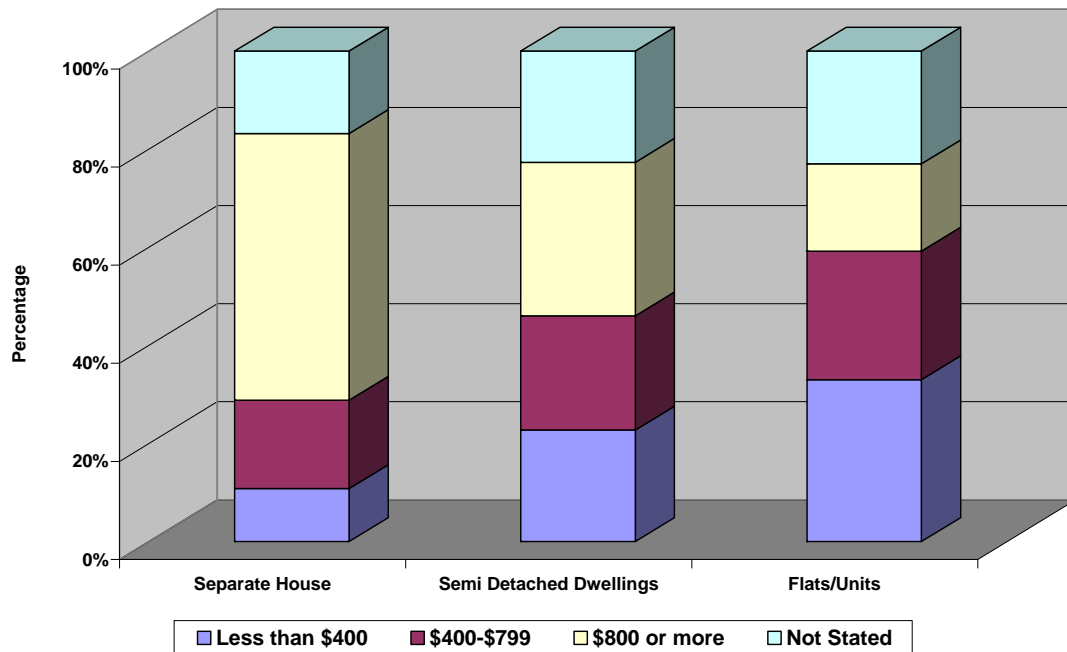


Figure 1.1c: Dwelling type by weekly household income, Penrith 2001



1.3 SCENARIO 1: THE BASE CASE – DWELLING, HOUSEHOLD, TENURE AND INCOME PROFILES BASED ON ABS HOUSEHOLD PROJECTIONS TO 2019

To begin to test what the likely impact on Penrith's housing and household structure the projected increases in household numbers might have, Scenario 1 presents the outcomes for dwelling, tenure and income mix that would result from a straightforward projection of the numbers of households types based on ABS household projections and current (2001) household dwelling, tenure and income profiles for Penrith. This has been used as the base case option. If nothing changes, then this is the best estimate of the outcome of current trends in household growth.

The ABS estimates that there will be 82,529 households in Penrith in 2019, an increase of 25,280 on the 2001 figure. If these households are allocated dwelling types based on the current dwelling mix in Penrith presented in Table 1.2 (85 per cent separate houses and 15 per cent multi unit and other dwellings), we would expect a large increase in the number of separate houses with smaller increases in higher density forms, as Table 1.2 shows.

Table 1.2: Estimated change in dwelling stock 2001-2019 based on an extrapolation of current household dwelling propensities

	Dwellings in 2001	Estimated Number of Dwellings in 2021	Change 2001-2019
Separate House	48,813	70,368	21,555
Semi Detached	3,990	5,752	1,762
Flats/Units	3,542	5,106	1,564
Other	904	1,303	399
Total	57,249	82,529	25,280

The straightforward projection of household numbers to 2019 based on the current household mix is given in Table 1.3. This generates a large increase in the number of couples with and without children, with smaller increases in one parent families and lone person households.

Table 1.3: Estimated Change in Household Type 2001-2019: Extrapolation on current household profile compared to ABS projections.

	2001	% 2001	Estimated 2019	% 2019	Change 2001-2019	ABS Projections 2019	Estimated minus Projection
Couples with Children	25,143	43.9%	36,246	43.9%	11,103	34,229	2,017
Couples without children	12,035	21.0%	17,349	21.0%	5,314	20,635	-3,286
One parent families	7,902	13.8%	11,391	13.8%	3,489	10,701	690
Lone person households	9,169	16.0%	13,218	16.0%	4,049	15,339	-2,121
Other	3,000	5.2%	4,325	5.2%	1,325	1,625	2,700
Total	57,249	100.0%	82,529	100.0%	25,280	82,529	

However, if the current dwelling preferences of household types shown in Table 1.1 are applied to these household type projections, then the forecast shows a shortfall in the number of couples without children and lone person households compared to ABS projections. This suggests that current household and dwelling mix may not be in line with the changing household structure being predicted by the ABS.

Dwelling mix projections

Using the household projections in Table 1.3, and applying the cell percentages in Table 1.1b, it is possible to estimate the likely dwelling mix that might be expected in 2019 if current household-dwelling propensities remained constant. Table 1.4 presents the projected increases between 2001 and 2019 by dwelling type. On current propensities we would expect a large increase in couples with or without children in separate houses. Conversely, we might expect a larger increase in lone person households in semi detached dwellings and flats than other household types. However, it is significant that these projections indicate that the increase in childless couples will primarily be accommodated by an increase in separate dwellings.

Table 1.4: Estimated Increases in Household Type by Dwelling Type, 2019 based on current household dwelling propensities

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Couples with Children	10,602	291	118	92	11,103
Couples without children	4,754	293	197	71	5,314
One parent families	2,853	399	201	37	3,489
Lone person households	2,523	549	835	141	4,049
Other	824	231	212	58	1,325
Total	21,555	1,762	1,564	399	25,280

Tenure mix projections

Applying the same methodology, and if the dwelling numbers from Table 1.2 for 2019 are correct, then we would expect the tenure type changes presented in Table 1.5, if current (2001) tenure propensities are maintained. Of the extra 25,280 dwellings in Penrith in 2019 we would expect large increases in the numbers of owners (8,183) and purchasers (9,286). However, we would also expect a significant increase in the number of private renters (4,918), while public rentals and dwellings of other tenure to only slightly increase or remain relatively stable.

Table 1.6 presents the changes between 2001 and 2019 for each of the tenure categories by dwelling type. Given current propensities, we might expect a large increase in owner-occupiers and purchasers in separate houses, but proportionally larger increases in private rental in semi detached dwellings and flats. However, it is worth noting that the clear majority of the increase in private rental is accommodated in separate houses which account for two thirds (63 per cent) of the increase in private rental numbers.

Table 1.5: Estimated Change in Tenure 2001-2019 based on ABS household projections

	2001	%	Estimated 2019	%	Change 2001-2019
Owned	18,529	32.4%	26,712	32.4%	8,183
Being Purchased	21,029	36.7%	30,315	36.7%	9,286
Rented from State Housing Authority	2,536	4.4%	3,656	4.4%	1,120
Rented from Other Sources	11,137	19.5%	16,055	19.5%	4,918
Other	1,315	2.3%	1,895	2.3%	580
Not Stated	2,703	4.7%	3,897	4.7%	1,194
Total	57,249	100.0%	82,529	100.0%	25,280

Table 1.6: Estimated Increases in Tenure by Dwelling Type, 2019 based on current household dwelling propensities

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Owned	7,638	219	223	102	8,182
Being Purchased	8,936	207	120	23	9,286
Rented from State Housing Authority	584	312	224	0	1,120
Rented from Other Sources	3,116	861	768	173	4,918
Other	403	49	80	47	580
Not Stated	878	113	149	54	1,194
Total	21,555	1,762	1,564	399	25,280

Income mix projections

Turning to the impact on the income mix in Penrith that would follow an increase in households on the basis of the ABS projections and assuming current (2001) income profiles, we would expect the largest increases to be in moderate and high income households in Penrith by 2019 (Table 1.7). High income households (\$1,200 to \$1,999 per week at 2001 levels) would increase the most (5,840) followed by moderate income households (4,619). But significantly, the next largest increase would be for very low income households (3,342), a likely reflection in the increase in older households in the population.

Table 1.7: Estimated Change in Household Income 2001-2019

	2001	%	Estimated 2019	%	Change 2001-2019
Very low (Less than \$400)	7,569	13.2%	10,911	13.2%	3,342
Low (\$400-\$599)	5,318	9.3%	7,666	9.3%	2,348
Low-moderate (\$600-\$799)	5,483	9.6%	7,904	9.6%	2,421
Moderate (\$800-\$1,199)	10,460	18.3%	15,079	18.3%	4,619
High (\$1,200-\$1,999)	13,226	23.1%	19,066	23.1%	5,840
Very high (\$2,000 or more)	5,009	8.7%	7,221	8.7%	2,212
Not Stated	10,184	17.8%	14,682	17.8%	4,497
Total	57,249	100.0%	82,529	100.0%	25,280

Importantly, the increases in high and moderate income households would largely be accommodated by those living in separate houses (Table 1.8). For those living in semi detached dwellings and flats, current propensities suggest that the largest increases would be in households on lower incomes. In fact, almost half (47 per cent) of the projected increase in flat residents would have incomes below \$600 per week at 2001 levels, compared to 25 per cent of those in separate houses.

Table 1.8: Estimated Change in Household Income by Dwelling Type, 2019

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Very low (Less than \$400)	2,332	400	516	93	3,342
Low (\$400-\$599)	1,868	210	224	45	2,348
Low-moderate (\$600-\$799)	2,005	200	186	31	2,421
Moderate (\$800-\$1,199)	4,120	274	181	45	4,619
High (\$1,200-\$1,999)	5,475	232	86	49	5,840
Very high (\$2,000 or more)	2,136	47	12	18	2,212
Not Stated	3,619	400	359	119	4,497
Total	21,555	1,762	1,564	399	25,280

1.4 SCENARIO 2: DWELLING, HOUSEHOLD, TENURE AND INCOME PROFILES BASED ON HISTORIC HOUSEHOLD CHANGE PROJECTIONS

This scenario presents an alternative estimate of future changes in household types by taking the change in household types experienced between 1991 and 2001 in Penrith and projecting these forward over twenty years to 2021. The current (2001) dwelling preference for each household type is then used to estimate the dwelling stock necessary to house the future household mix.

Therefore, this scenario assumes that:

- Household changes that occurred between 1991 and 2001 continue until 2021.
- The dwelling preference of different household types in 2001 will continue until 2021

Under Scenario 2 assumptions we would expect that in 2021 there would be 79,601 dwellings in Penrith LGA (Table 1.9), lower than the Scenario 1 total of 82,529 dwellings based on ABS household projections. This would result in an increase of 22,352 dwellings on the 2001 figure. Of these new dwellings there would be an extra 17,281 separate houses, 2,256 semi detached dwellings and 2,289 flats. The ratio between separate houses and multi-unit dwellings is therefore 77:23. The biggest change over this time period would therefore be in attached dwellings. Under Scenario 2 assumptions, separate houses would increase in number by 35%, whereas, semi detached dwellings and flats would increase by 57% and 65%, respectively. Under this scenario, therefore, there is a significantly greater increase in higher density housing than Scenario 1, with semis and flats accounting for 20 per cent of total dwelling in 2019, compared to 13 per cent under Scenario 1.

Table 1.9: The Estimated Number of Dwellings in 2021 under Scenario 2 assumptions

	Dwellings in 2001	Estimated Number of Dwellings in 2021	Change 2001-2021	Percentage Change 2001-2021
Separate Houses	48,813	66,094	17,281	35%
Semi Detached Dwellings	3,990	6,246	2,256	57%
Flats/Units	3,542	5,831	2,289	65%
Other Dwellings	904	1,430	526	58%
Total	57,249	79,601	22,352	39%

(Note: Flats attached to houses are classified as 'Other Dwellings')

Household mix projections

As with Scenario 1, of the extra 22,352 dwellings by 2021 predicted under Scenario 2, the majority would come from an increase in couple families with children (Table 1.10). Under Scenario 2 assumptions couples with children would be expected to increase by 9,166, couples without children by 4,568, one parent families by 3,140

and lone person households by 4,135. Importantly, there is a relative shift to lone parents and lone persons in this scenario compared to Scenario 1.

Not surprisingly, if current preferences continue to 2021, half of the increase in separate houses will be occupied couples with children, with smaller increases in couples without children, one parent families and lone person households (Table 1.11). Conversely, the increase in semi-detached dwellings and flats will from lone person households.

Table 1.10: Estimated Change in Household Type 2001-2021

	2001	%	Estimated 2021	%	Change 2001-2021	ABS Projection 2019	Estimated minus Projection
Couples with Children	25,143	43.9%	34,309	43.1%	9,166	34,229	80
Couples without children	12,035	21.0%	16,603	20.9%	4,568	20,635	-4,032
One parent families	7,902	13.8%	11,042	13.9%	3,140	10,701	341
Lone person households	9,169	16.0%	13,304	16.7%	4,135	15,339	-2,035
Other	3,000	5.2%	4,343	5.5%	1,343	1,625	2,718
Total	57,249	100.0%	79,601	100.0%	22,352	82,529	-2,928

Table 1.11: Estimated Change in Household Type by Dwelling Type, 2021

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Couples with Children	8,499	372	173	122	9,166
Couples without children	3,811	375	289	93	4,568
One parent families	2,287	511	294	48	3,140
Lone person households	2,023	703	1,223	186	4,135
Other	661	295	310	77	1,343
Total	17,281	2,256	2,289	526	22,352

Tenure mix projections

Based on Scenario 2 assumptions the largest increase in tenure to 2021 will be from the owner/purchaser market (Table 1.12). Between 2001 and 2019 owner-occupiers are expected to increase by 6,865 and purchasers by 7,635. There will also be a significant increase in private renters (4,952) with little change in public housing.

The increases in owner occupation and purchasing will largely be fuelled by the separate (detached) housing market, whereas, the significant increase in private rental will occur in the semi detached and flat market (Table 1.13). However, under Scenario 2 assumption there will be a proportionally greater shift towards private rental, with 22 per cent of dwellings in this tenure, compared to 19 per cent under Scenario 1 (see Table 1.6).

Table 1.12: Estimated Change in Tenure 2001-2021

	2001	%	Estimated 2021	%	Change 2001-2021	Percentage Point Change
Owned	18,529	32.4%	25,394	31.9%	6,865	-0.5%
Being Purchased	21,029	36.7%	28,664	36.0%	7,635	-0.7%
Rented from State Housing Authority	2,536	4.4%	3,732	4.7%	1,196	0.3%
Rented from Other Sources	11,137	19.5%	16,089	20.2%	4,952	0.7%
Other	1,315	2.3%	1,881	2.4%	566	0.1%
Not Stated	2,703	4.7%	3,841	4.8%	1,138	0.1%
Total	57,249	100.0%	79,601	100.0%	22,352	

Table 1.13: Estimated Change in Tenure by Dwelling Type, 2021

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Owned	6,124	281	326	134	6,865
Being Purchased	7,164	265	175	31	7,635
Rented from State Housing Authority	468	399	329	0	1,196
Rented from Other Sources	2,498	1,103	1,123	228	4,952
Other	323	63	118	63	567
Not Stated	704	145	218	71	1,138
Total	17,281	2,256	2,289	526	22,352

Household income projections

Under Scenario 2 assumptions broadly similar trends in household incomes to Scenario 1 were generated. However, there is a marginally greater shift to households on lower incomes although, as with Scenario 1, we would expect the largest increase in household income to come from the high and moderate income brackets (Table 1.14). Under this Scenario, it is anticipated that there would be an increase of 5,164 high income households and 4,084 moderate income households. Importantly, there is also expected to be increase of 2,955 very low income households, 2,141 low-moderate income households and 2,076 low income households.

While the majority of the extra high and moderate income households will be housed in separate houses, the increases in the very low to low-moderate income households will be disproportionately recorded in the semi detached and flat/unit market (Table 1.15).

Table 1.14: Estimated Change in Household Income 2001-2021

	2001	%	Estimated 2021	%	Change 2001-2021	Percentage Point Change
Very low (Less than \$400)	7,569	13.2%	10,524	13.6%	2,955	0.4%
Low (\$400-\$599)	5,318	9.3%	7,394	9.4%	2,076	0.1%
Low-moderate (\$600-\$799)	5,483	9.6%	7,624	9.6%	2,141	0.0%
Moderate (\$800-\$1,199)	10,460	18.3%	14,544	18.1%	4,084	-0.2%
High (\$1,200-\$1,999)	13,226	23.1%	18,390	22.7%	5,164	-0.4%
Very high (\$2,000 or more)	5,009	8.7%	6,965	8.6%	1,956	-0.1%
Not Stated	10,184	17.8%	14,161	17.9%	3,976	0.1%
Total	57,249	100.0%	79,601	100.0%	22,352	

Table 1.15: Estimated Change in Household Income by Dwelling Type, 2021

	Separate Houses	Semi Detached Dwellings	Flats	Other	Total
Very low (Less than \$400)	1,870	513	755	123	3,261
Low (\$400-\$599)	1,498	269	328	60	2,155
Low-moderate (\$600-\$799)	1,607	256	272	41	2,176
Moderate (\$800-\$1,199)	3,303	350	265	59	3,977
High (\$1,200-\$1,999)	4,389	297	125	64	4,875
Very high (\$2,000 or more)	1,712	60	17	23	1,813
Not Stated	2,902	512	526	157	4,096
Total	17,281	2,256	2,289	526	22,352

1.5 SCENARIO 3: SUBURB LEVEL PROJECTIONS BASED ON RECENT DEVELOPMENT APPROVAL TRENDS

This Scenario uses the Development Approval (DA) records from Penrith Council to predict forward an estimate of future dwelling numbers. In other words, it estimates what the outcome would be if the mix of development in Penrith in the last five years is repeated until 2019. The DA records have been provided by Penrith Council at the suburb level and by different dwelling types (single dwelling, dual occupancy and multi-unit housing) between 1998 and 2003. This allows a finer level of geographical detail than the previous scenarios have been able to provide. The annual average number of DAs by dwelling type over this time will be used to estimate the number of dwellings in 2019 from the base case scenario (2001).

A number of assumptions are made for this scenario:

- The annual average number of DAs between 1998 and 2003 remains constant to 2019.
- No account is taken of future greenfield development.
- Dual Occupancies and Multi-unit DAs are referred to collectively as 'multi-unit' DAs.
- Single Dwelling DAs refer to the Census category of Separate Houses, and Dual Occupancy and Multi-Unit DAs refer to the Census categories of Semi Detached Dwellings and Flats/Units.
- The Census category of Semi Detached Dwellings and Flats/Units will collectively be referred to as Multi-Unit Dwellings.

Under Scenario 3 assumptions we would expect 75,277 dwellings in Penrith LGA in 2019 (Table 1.16). This represents an increase of 18,798 dwellings between 2001 and 2019, significantly lower than Scenario 1 projections. The split between separate houses and multi-units dwellings is 50:50 with 9,480 new separate dwellings and 9,318 new multi-unit dwellings.

Based on DA trends over the last five years, not surprisingly, it is anticipated that there would be larger dwelling increase in the suburbs of Glenmore Park, Penrith, St Marys, Kingswood, Jamisontown, Cranebrook and in rural residential areas within the LGA. In Glenmore Park, Cranebrook and rural residential areas we would expect the majority of the increase to 2019 to come from separate houses. However, in Jamisontown, Kingswood, Penrith and St Marys the extra number of dwellings would be accounted for primarily by multi-unit developments.

Household mix projections

Under Scenario 3 assumptions the largest increase in separate houses to 2019 will be from couples with children (29,044) (Table 1.17). Couples without children (12,340) and single parent families (7,128) will also provide a significant proportion of those who will reside in separate houses. Conversely, under Scenario 3 assumptions the largest increases in multi-unit dwellings will come from lone person households (7,076) and single parent families (2,848). Overall, the large increase in separate

houses to 2019 under Scenario 3 implies that couple families with children will have the largest increase, followed by couples with children and lone person households.

Overall, the largest increases in couples with and without children will be accommodated in newer suburbs such as Glenmore Park and Cranebrook as well as in the rural areas under Scenario 3 assumptions (Table 1.18), whereas the largest increase in lone person households will be accommodated in Penrith, Jamisontown, Kingswood and St Marys.

Tenure mix projections

For those suburbs with expected large increases in separate houses, the majority of these would be either owned or being purchased under Scenario 3 assumptions (Table 1.19). Only in Glenmore Park, Cranebrook and the rural residential areas is the number of privately rented separate houses expected to increase significantly.

In those suburbs which are anticipated to have larger increases in multi-unit dwellings, the majority of these dwellings will be privately rented. Overall, suburbs with larger increase in separate houses will tend to have larger increases in owners and purchasers (for example, Glenmore Park and Cranebrook), whereas areas with larger increases in multi-unit dwellings will tend to have higher increases in private renters under Scenario 3 assumptions (Table 1.20). For example, in Jamisontown, Kingswood, Penrith, St Marys, Oxley Park and Werrington over half of the extra multi-unit dwellings will be privately rented.

Income mix projections

The increase between 2001 and 2019 under Scenario 3 assumptions in separate houses in most suburbs across the Penrith LGA will be accounted for by increases in moderate and high income households (Table 1.21). This is particularly so in Cranebrook, Glenmore Park and the rural residential areas. Conversely, the change in multi-unit dwellings in suburbs in Penrith LGA will be accounted for by increases in the very low to low-moderate income groups under Scenario 3 assumptions (Table 1.22). This is particularly so in St Marys, Penrith and Kingswood, although in Jamisontown and Oxley Park and Werrington there will also be significant increases in moderate income households in multi-unit developments.

The geography of change

While the impacts of suburb level have been discussed above, it is worth reviewing the overall impact of the expansion of higher density if current development trends continue, given the current zoning scheme. Without a major rezoning exercise or the diversion of new higher density development into new release areas (see Scenario 4), then almost three quarters (72 per cent) of new multi-unit development will be undertaken in just four suburbs: Jamisontown, Kingswood, Penrith and St Marys. Four other suburbs will accommodate most of the remaining increase of higher density housing: Oxley Park, Emu Plains, Cambridge Park and Werrington, together accounting for 20 per cent. This level of renewal activity will have substantial impact on these suburbs and their populations, with on current trends a preponderance of the

new higher density development in these suburbs accommodating smaller, lower income households who predominantly rent.

Table 1.16: The Projected Number of Dwellings in Penrith Suburbs Based on Current DA Trends

Suburb	Average Number of DAs per annum (1998-2003)			Dwellings at 2001 Census ¹			Projected Dwellings at 2019 based on the current number of DAs per annum			Additional Dwellings 2001-2019		
	Single Dwellings	Multi-Unit	Total	Single Dwellings	Multi-Unit	Total	Single Dwellings	Multi-Unit	Total	Single Dwellings	Multi-Unit	Total
Cambridge Gardens	0.8	0.0	0.8	683	3	686	698	3	701	15	0	15
Cambridge Park	2.3	13.7	16.0	1,996	124	2,120	2,038	370	2,408	42	246	288
Claremont Meadows	1.5	0.5	2.0	1,015	45	1,060	1,042	54	1,096	27	9	36
Colyton	8.2	1.3	9.5	2,562	93	2,655	2,709	117	2,826	147	24	171
Cranebrook	54.5	3.7	58.2	3,609	431	4,040	4,590	497	5,087	981	66	1,047
Emu Heights	7.3	1.0	8.3	1,006	17	1,023	1,138	35	1,173	132	18	150
Emu Plains	8.2	26.8	35.0	2,426	392	2,818	2,573	875	3,448	147	483	630
Erskine Park	16.8	0.5	17.3	1,950	11	1,961	2,253	20	2,273	303	9	312
Glenmore Park	305.0	7.5	312.5	4,838	335	5,173	10,328	470	10,798	5,490	135	5,625
Jamisontown	1.0	72.2	73.2	1,271	443	1,714	1,289	1,742	3,031	18	1,299	1,317
Kingswood	3.2	77.2	80.3	1,865	1,248	3,113	1,922	2,637	4,559	57	1,389	1,446
Leonay	2.5	0.0	2.5	836	6	842	881	6	887	45	0	45
North St Marys	1.3	0.2	1.5	1,265	26	1,291	1,289	29	1,318	24	3	27
Oxley Park	2.0	28.8	30.8	701	166	867	737	685	1,422	36	519	555
Penrith	6.7	118.7	125.3	2,572	2,297	4,869	2,692	4,433	7,125	120	2,136	2,256
Regentville	2.5	0.0	2.5	260	3	263	305	3	308	45	0	45
South Penrith	7.7	1.3	9.0	3,927	223	4,150	4,065	247	4,312	138	24	162
St Clair	18.2	2.5	20.7	6,059	41	6,100	6,386	86	6,472	327	45	372
St Marys	5.5	105.8	111.3	2,596	1,021	3,617	2,695	2,926	5,621	99	1,905	2,004
Werrington	0.5	35.0	35.5	729	565	1,294	738	1,195	1,933	9	630	639
Werrington County	1.2	1.0	2.2	1,245	9	1,254	1,266	27	1,293	21	18	39
Werrington Downs	0.2	0.0	0.2	1,043	0	1,043	1,046	0	1,046	3	0	3
Other/Rural	69.7	20.0	89.7	4,359	167	4,526	5,613	527	6,140	1,254	360	1,614
Total	526.7	517.7	1044.3	48,813	7,666	56,479	58,293	16,984	75,277	9,480	9,318	18,798

Notes:

1. Excludes unoccupied dwellings on Census night, other dwellings (e.g. caravans), and those dwellings where the structure was not stated

Urban Growth Management in Penrith Stage 2 Report

Table 1.17: Estimated number of households by type in 2019 based on Scenario 3 dwelling trends

	Separate Houses						Multi-Unit Dwellings					
	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total
Cambridge Gardens	356	132	99	77	35	698	0	0	0	0	3	3
Cambridge Park	832	456	319	319	112	2,038	48	54	75	143	51	370
Claremont Meadows	591	192	126	90	42	1,042	8	7	17	18	4	54
Colyton	1,226	554	414	357	158	2,709	20	16	23	34	24	117
Cranebrook	2,383	883	655	449	220	4,590	116	40	202	98	40	497
Emu Heights	600	244	143	106	45	1,138	6	6	6	0	16	35
Emu Plains	1,115	665	310	330	154	2,573	60	118	76	549	71	875
Erskine Park	1,487	358	205	127	76	2,253	5	5	5	4	0	20
Glenmore Park	5,898	2,346	828	613	643	10,328	114	86	83	119	69	470
Jamisontown	639	280	145	166	59	1,289	142	248	260	861	232	1,742
Kingswood	715	420	313	317	156	1,922	368	374	579	866	450	2,637
Leonay	445	254	52	89	42	881	3	3	0	0	0	6
North St Marys	440	262	283	222	82	1,289	3	3	9	11	2	29
Oxley Park	282	164	110	131	49	737	140	111	206	165	62	685
Penrith	877	648	412	533	222	2,692	315	706	504	2,152	757	4,433
Regentville	134	68	36	43	23	305	0	3	0	0	0	3
South Penrith	1,799	967	548	572	179	4,065	25	27	54	96	44	247
St Clair	3,796	1,040	797	481	272	6,386	25	6	15	15	25	86
St Marys	956	579	424	545	191	2,695	330	361	456	1,393	387	2,926
Unclassified NSW	2,824	1,267	511	592	418	5,613	95	104	47	126	155	527
Werrington	321	130	131	104	53	738	144	165	233	425	228	1,195
Werrington County	701	258	159	114	35	1,266	0	0	0	0	27	27
Werrington Downs	628	172	108	92	45	1,046	0	0	0	0	0	0
Total	29,044	12,340	7,128	6,471	3,310	58,293	1,967	2,445	2,848	7,076	2,647	16,984

Table 1.17 cont'd

	Total Dwellings					
	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total
Cambridge Gardens	356	132	99	77	38	701
Cambridge Park	880	510	393	462	163	2,408
Claremont Meadows	600	199	143	108	46	1,096
Colyton	1,246	570	437	391	181	2,826
Cranebrook	2,500	923	857	547	260	5,087
Emu Heights	606	251	149	106	62	1,173
Emu Plains	1,175	783	386	879	225	3,448
Erskine Park	1,492	364	210	131	76	2,273
Glenmore Park	6,012	2,432	911	732	711	10,798
Jamisontown	780	528	405	1,027	291	3,031
Kingswood	1,083	794	892	1,184	606	4,559
Leonay	448	257	52	89	42	887
North St Marys	444	265	292	233	84	1,318
Oxley Park	422	275	317	296	111	1,422
Penrith	1,192	1,354	916	2,685	978	7,125
Regentville	134	71	36	43	23	308
South Penrith	1,825	993	602	669	223	4,312
St Clair	3,822	1,047	811	495	297	6,472
St Marys	1,286	940	879	1,938	578	5,621
Unclassified NSW	2,919	1,371	559	719	573	6,140
Werrington	465	295	363	529	281	1,933
Werrington County	701	258	159	114	62	1,293
Werrington Downs	628	172	108	92	45	1,046
Total	31,011	14,786	9,976	13,547	5,958	75,277

Urban Growth Management in Penrith Stage 2 Report

Table 1.18: Estimated change in households by type between 2001 and 2019 based on Scenario 3 dwelling trends

	Separate Houses						Multi-Unit Dwellings					
	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total
Cambridge Gardens	8	3	2	2	1	15	0	0	0	0	0	0
Cambridge Park	17	9	7	7	2	42	32	36	50	95	34	246
Claremont Meadows	15	5	3	2	1	27	1	1	3	3	1	9
Colyton	67	30	22	19	9	147	4	3	5	7	5	24
Cranebrook	509	189	140	96	47	981	15	5	27	13	5	66
Emu Heights	70	28	17	12	5	132	3	3	3	0	8	18
Emu Plains	64	38	18	19	9	147	33	65	42	303	39	483
Erskine Park	200	48	28	17	10	303	2	2	2	2	0	9
Glenmore Park	3,135	1,247	440	326	342	5,490	33	25	24	34	20	135
Jamisontown	9	4	2	2	1	18	106	185	194	642	173	1,299
Kingswood	21	12	9	9	5	57	194	197	305	456	237	1,389
Leonay	23	13	3	5	2	45	0	0	0	0	0	0
North St Marys	8	5	5	4	2	24	0	0	1	1	0	3
Oxley Park	14	8	5	6	2	36	106	84	156	125	47	519
Penrith	39	29	18	24	10	120	152	340	243	1,037	365	2,136
Regentville	20	10	5	6	3	45	0	0	0	0	0	0
South Penrith	61	33	19	19	6	138	2	3	5	9	4	24
St Clair	194	53	41	25	14	327	13	3	8	8	13	45
St Marys	35	21	16	20	7	99	215	235	297	907	252	1,905
Unclassified NSW	631	283	114	132	93	1,254	65	71	32	86	106	360
Werrington	4	2	2	1	1	9	76	87	123	224	120	630
Werrington County	12	4	3	2	1	21	0	0	0	0	18	18
Werrington Downs	2	0	0	0	0	3	0	0	0	0	0	0
Total	5,157	2,075	919	757	572	9,480	1,052	1,347	1,518	3,953	1,447	9,318

Table 1.18 cont'd

	Total Dwellings					
	Couple family with children	Couple without children	Single Parent family	Lone Person Household	Other/Not Stated	Total
Cambridge Gardens	8	3	2	2	1	15
Cambridge Park	49	45	56	102	36	288
Claremont Meadows	17	6	6	5	2	36
Colyton	71	33	27	26	13	171
Cranebrook	525	194	167	109	52	1,047
Emu Heights	73	32	20	12	14	150
Emu Plains	97	103	60	322	48	630
Erskine Park	202	51	30	19	10	312
Glenmore Park	3,168	1,272	464	360	361	5,625
Jamisontown	114	189	196	644	174	1,317
Kingswood	215	209	314	466	242	1,446
Leonay	23	13	3	5	2	45
North St Marys	9	5	6	5	2	27
Oxley Park	120	92	162	131	49	555
Penrith	191	369	261	1,061	374	2,256
Regentville	20	10	5	6	3	45
South Penrith	64	35	24	29	10	162
St Clair	208	57	48	32	27	372
St Marys	250	256	312	927	259	2,004
Unclassified NSW	696	354	147	219	199	1,614
Werrington	80	89	124	225	121	639
Werrington County	12	4	3	2	19	39
Werrington Downs	2	0	0	0	0	3
Total	6,209	3,423	2,437	4,710	2,020	18,798

Urban Growth Management in Penrith Stage 2 Report

Table 1.19: Estimated number of households by tenure in 2019 based on Scenario 3 dwelling trends

	Separate Houses						Multi-Unit Dwellings					
	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total
Cambridge Gardens	248	321	9	81	39	698	0	0	0	0	3	3
Cambridge Park	860	728	34	292	125	2,038	53	59	41	189	27	370
Claremont Meadows	164	661	18	156	42	1,042	8	16	3	24	3	54
Colyton	1,062	990	81	399	178	2,709	32	11	16	46	11	117
Cranebrook	967	2,401	234	757	231	4,590	44	61	272	92	28	497
Emu Heights	392	555	20	131	39	1,138	9	13	0	9	4	35
Emu Plains	1,134	946	7	342	144	2,573	134	51	165	174	350	875
Erskine Park	544	1,340	23	231	114	2,253	0	8	0	10	2	20
Glenmore Park	1,919	5,796	32	1,936	645	10,328	38	83	49	268	31	470
Jamisontown	475	534	38	181	61	1,289	256	233	12	1,111	130	1,742
Kingswood	797	609	61	332	124	1,922	231	203	481	1,531	191	2,637
Leonay	467	317	0	64	33	881	3	0	0	0	3	6
North St Marys	390	391	276	155	76	1,289	3	4	7	15	0	29
Oxley Park	346	214	9	119	48	737	120	79	83	374	29	685
Penrith	1,019	713	254	519	186	2,692	670	299	597	2,298	570	4,433
Regentville	130	108	0	54	13	305	0	0	0	3	0	3
South Penrith	1,788	1,482	110	525	160	4,065	45	30	37	103	32	247
St Clair	2,026	3,194	56	772	339	6,386	20	22	0	27	18	86
St Marys	1,181	729	127	470	188	2,695	365	210	583	1,497	270	2,926
Werrington	266	242	33	139	58	738	152	181	80	588	194	1,195
Werrington County	523	546	3	141	53	1,266	0	0	0	27	0	27
Werrington Downs	327	546	0	114	59	1,046	0	0	0	0	0	0
Unclassified NSW	2,746	1,570	5	738	554	5,613	126	59	0	223	119	527
Total	19,770	24,934	1,433	8,647	3,509	58,293	2,309	1,623	2,427	8,610	2,015	16,984

Urban Growth Management in Penrith Stage 2 Report

Table 1.19 cont'd

	Total					
	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total
Cambridge Gardens	248	321	9	81	42	701
Cambridge Park	913	787	75	481	151	2,408
Claremont Meadows	172	677	22	180	46	1,096
Colyton	1,094	1,001	98	445	189	2,826
Cranebrook	1,011	2,463	506	848	259	5,087
Emu Heights	401	569	20	140	43	1,173
Emu Plains	1,268	997	173	516	495	3,448
Erskine Park	544	1,348	23	241	116	2,273
Glenmore Park	1,957	5,879	81	2,204	676	10,798
Jamisontown	731	766	50	1,293	191	3,031
Kingswood	1,027	812	542	1,863	314	4,559
Leonay	470	317	0	64	36	887
North St Marys	393	395	283	170	76	1,318
Oxley Park	466	293	92	492	77	1,422
Penrith	1,689	1,012	851	2,817	756	7,125
Regentville	130	108	0	57	13	308
South Penrith	1,833	1,512	146	628	193	4,312
St Clair	2,045	3,215	56	799	357	6,472
St Marys	1,546	939	710	1,968	458	5,621
Werrington	418	423	113	727	252	1,933
Werrington County	523	546	3	168	53	1,293
Werrington Downs	327	546	0	114	59	1,046
Unclassified NSW	2,872	1,629	5	961	673	6,140
Total	22,079	26,557	3,860	17,257	5,524	75,277

Urban Growth Management in Penrith Stage 2 Report

Table 1.20: Estimated change in tenure numbers between 2001 and 2019 based on Scenario 3 dwelling trends

	Separate Houses						Multi-Unit Dwellings					
	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total
Cambridge Gardens	6	7	0	2	0	15	0	0	0	0	0	0
Cambridge Park	18	15	1	6	3	42	35	39	27	125	24	251
Claremont Meadows	4	18	0	4	0	27	1	2	0	3	3	9
Colyton	58	54	4	22	10	147	7	2	4	10	11	35
Cranebrook	207	513	50	162	49	981	6	8	37	13	6	70
Emu Heights	46	65	2	15	3	132	5	7	0	5	4	21
Emu Plains	65	54	0	20	8	147	74	28	91	96	198	488
Erskine Park	73	180	3	31	15	303	0	4	0	5	0	9
Glenmore Park	1,020	3,081	17	1,029	343	5,490	11	24	14	78	12	140
Jamisontown	6	7	0	2	3	18	191	174	9	829	100	1,303
Kingswood	24	18	2	10	4	57	122	107	254	808	109	1,400
Leonay	23	16	0	3	3	45	0	0	0	0	0	0
North St Marys	7	7	5	3	1	24	1	1	1	0	0	3
Oxley Park	17	10	0	6	2	36	91	60	63	284	26	524
Penrith	45	32	11	23	8	120	323	144	288	1,108	290	2,152
Regentville	20	16	0	8	1	45	0	0	0	0	0	0
South Penrith	61	50	4	18	5	138	4	3	4	10	12	33
St Clair	104	164	3	40	17	327	11	12	0	14	18	54
St Marys	43	27	5	17	7	99	238	137	380	976	187	1,919
Werrington	3	3	0	2	1	9	80	95	42	309	104	630
Werrington County	8	8	0	2	3	21	0	0	0	21	0	21
Werrington Downs	0	0	0	1	2	3	0	0	0	0	0	0
Unclassified NSW	615	351	2	165	121	1,254	89	42	0	157	102	390
Total	2,472	4,697	112	1,590	609	9,480	1,289	890	1,215	4,852	1,206	9,452

Table 1.20 cont'd

	Total Dwellings					
	Owned	Purchasing	Rented from Public Landlord	Rented from Other Sources	Other/Not Stated	Total
Cambridge Gardens	0	0	0	0	0	0
Cambridge Park	53	54	28	131	26	293
Claremont Meadows	5	20	1	7	4	36
Colyton	65	56	9	32	21	182
Cranebrook	213	522	87	174	55	1,051
Emu Heights	51	73	2	20	7	153
Emu Plains	139	82	92	116	207	635
Erskine Park	73	184	3	36	15	312
Glenmore Park	1,031	3,105	31	1,107	355	5,630
Jamisontown	197	180	9	832	103	1,321
Kingswood	145	125	256	818	112	1,457
Leonay	23	16	0	3	3	45
North St Marys	8	8	6	3	1	27
Oxley Park	108	70	63	289	28	560
Penrith	368	176	299	1,131	298	2,272
Regentville	20	16	0	8	1	45
South Penrith	65	53	7	28	18	171
St Clair	114	175	3	54	35	381
St Marys	281	164	385	994	194	2,018
Werrington	83	98	42	311	105	639
Werrington County	8	8	0	23	3	42
Werrington Downs	0	0	0	1	2	3
Unclassified NSW	704	393	2	322	223	1,644
Total	3,761	5,587	1,327	6,442	1,815	18,932

Table 1.21: Estimated number of households by income level in 2019 based on Scenario 3 dwelling trends

	Separate Houses							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	65	64	77	143	193	68	87	698
Cambridge Park	335	225	224	402	439	144	270	2,038
Claremont Meadows	65	97	91	264	322	86	117	1,042
Colyton	361	296	323	572	598	160	400	2,709
Cranebrook	429	354	483	1,092	1,293	396	543	4,590
Emu Heights	89	89	101	266	330	140	122	1,138
Emu Plains	255	240	223	488	687	323	357	2,573
Erskine Park	127	135	201	462	791	255	281	2,253
Glenmore Park	444	542	615	1,947	3,815	1,622	1,343	10,328
Jamisontown	132	110	122	239	380	139	167	1,289
Kingswood	321	217	227	389	374	139	256	1,922
Leonay	72	67	44	125	269	194	110	881
North St Marys	292	186	162	215	200	45	189	1,289
Oxley Park	146	87	80	141	132	42	108	737
Penrith	558	337	307	479	463	164	384	2,692
Regentville	25	39	21	70	82	26	42	305
South Penrith	493	432	383	774	1,047	428	509	4,065
St Clair	431	436	611	1,361	1,934	715	898	6,386
St Marys	562	345	331	507	452	123	377	2,695
Unclassified NSW	658	457	528	971	1,248	767	984	5,613
Werrington	103	89	73	144	158	60	111	738
Werrington County	104	100	109	253	380	150	170	1,266
Werrington Downs	66	70	94	213	326	122	154	1,046
Total	6,131	5,014	5,428	11,517	15,914	6,309	7,979	58,293

Table 1.21 cont'd

	Multi-Unit Dwellings							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	0	0	0	0	3	0	0	3
Cambridge Park	106	68	44	59	37	9	47	370
Claremont Meadows	4	7	12	18	11	0	2	54
Colyton	44	20	6	26	9	9	4	117
Cranebrook	150	87	63	62	48	10	77	497
Emu Heights	20	0	0	5	5	5	0	35
Emu Plains	384	113	59	61	61	20	176	875
Erskine Park	0	0	0	11	5	0	4	20
Glenmore Park	83	51	58	68	118	31	60	470
Jamisontown	377	286	278	369	222	52	159	1,742
Kingswood	763	431	379	426	275	30	333	2,637
Leonay	0	0	0	6	0	0	0	6
North St Marys	16	6	0	6	2	0	0	29
Oxley Park	153	119	89	145	77	13	89	685
Penrith	1,529	599	546	647	420	76	616	4,433
Regentville	0	0	0	0	0	0	3	3
South Penrith	88	27	31	31	43	7	21	247
St Clair	8	8	27	24	0	8	11	86
St Marys	1,055	453	424	360	206	12	416	2,926
Unclassified NSW	150	119	77	88	65	15	12	527
Werrington	290	167	152	239	133	6	207	1,195
Werrington County	27	0	0	0	0	0	0	27
Werrington Downs	0	0	0	0	0	0	0	0
Total	5,246	2,561	2,245	2,652	1,741	303	2,236	16,984

Table 1.21 cont'd

	Total Dwellings							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	65	64	77	143	196	68	87	701
Cambridge Park	441	293	267	461	476	153	316	2,408
Claremont Meadows	68	104	103	282	333	86	119	1,096
Colyton	405	316	328	598	607	168	404	2,826
Cranebrook	579	441	546	1,154	1,341	406	620	5,087
Emu Heights	109	89	101	271	335	145	122	1,173
Emu Plains	639	353	282	549	748	344	534	3,448
Erskine Park	127	135	201	473	797	255	284	2,273
Glenmore Park	527	594	673	2,015	3,933	1,654	1,403	10,798
Jamisontown	509	395	399	608	603	191	326	3,031
Kingswood	1,084	648	606	815	649	169	588	4,559
Leonay	72	67	44	131	269	194	110	887
North St Marys	308	192	162	221	202	45	189	1,318
Oxley Park	299	206	169	286	209	55	198	1,422
Penrith	2,087	936	853	1,127	882	240	1,000	7,125
Regentville	25	39	21	70	82	26	45	308
South Penrith	580	458	414	805	1,089	434	530	4,312
St Clair	439	444	638	1,385	1,934	723	909	6,472
St Marys	1,616	798	755	867	658	134	792	5,621
Unclassified NSW	808	576	605	1,059	1,313	783	995	6,140
Werrington	393	256	225	383	291	66	319	1,933
Werrington County	131	100	109	253	380	150	170	1,293
Werrington Downs	66	70	94	213	326	122	154	1,046
Total	11,377	7,575	7,674	14,169	17,655	6,612	10,214	75,277

Table 1.22: Estimated change in households by income level between 2001 and 2019 based on Scenario 3 dwelling trends

	Separate Houses							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	1	1	2	3	4	1	2	15
Cambridge Park	7	5	5	8	9	3	6	42
Claremont Meadows	2	3	2	7	8	2	3	27
Colyton	20	16	18	31	32	9	22	147
Cranebrook	92	76	103	233	276	85	116	981
Emu Heights	10	10	12	31	38	16	14	132
Emu Plains	15	14	13	28	39	18	20	147
Erskine Park	17	18	27	62	106	34	38	303
Glenmore Park	236	288	327	1,035	2,028	862	714	5,490
Jamisontown	2	2	2	3	5	2	2	18
Kingswood	10	6	7	12	11	4	8	57
Leonay	4	3	2	6	14	10	6	45
North St Marys	5	3	3	4	4	1	4	24
Oxley Park	7	4	4	7	6	2	5	36
Penrith	25	15	14	21	21	7	17	120
Regentville	4	6	3	10	12	4	6	45
South Penrith	17	15	13	26	36	15	17	138
St Clair	22	22	31	70	99	37	46	327
St Marys	21	13	12	19	17	5	14	99
Unclassified NSW	147	102	118	217	279	171	220	1,254
Werrington	1	1	1	2	2	1	1	9
Werrington County	2	2	2	4	6	2	3	21
Werrington Downs	0	0	0	1	1	0	0	3
Total	665	625	719	1,840	3,054	1,292	1,284	9,480

Table 1.22 cont'd

	Multi-Unit Dwellings							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	0	0	0	0	0	0	0	0
Cambridge Park	72	46	30	40	25	6	32	251
Claremont Meadows	1	1	2	3	2	0	0	9
Colyton	13	6	2	8	3	3	1	35
Cranebrook	21	12	9	9	7	1	11	70
Emu Heights	12	0	0	3	3	3	0	21
Emu Plains	214	63	33	34	34	11	98	488
Erskine Park	0	0	0	5	2	0	2	9
Glenmore Park	25	15	17	20	35	9	18	140
Jamisontown	282	214	208	276	166	39	119	1,303
Kingswood	405	229	201	226	146	16	177	1,400
Leonay	0	0	0	0	0	0	0	0
North St Marys	2	1	0	1	0	0	0	3
Oxley Park	117	91	68	111	59	10	68	524
Penrith	742	291	265	314	204	37	299	2,152
Regentville	0	0	0	0	0	0	0	0
South Penrith	12	4	4	4	6	1	3	33
St Clair	5	5	17	15	0	5	7	54
St Marys	692	297	278	236	135	8	273	1,919
Unclassified NSW	111	88	57	65	48	11	9	390
Werrington	153	88	80	126	70	3	109	630
Werrington County	21	0	0	0	0	0	0	21
Werrington Downs	0	0	0	0	0	0	0	0
Total	2,899	1,451	1,271	1,497	946	163	1,225	9,452

Table 1.22 cont'd

	Total Dwellings							
	Very low (Less than \$400)	Low (\$400-\$599)	Low-moderate (\$600-\$799)	Moderate (\$800-\$1,199)	High (\$1,200-\$1,999)	Very high (\$2,000 or more)	Not Stated	Total
Cambridge Gardens	1	1	2	3	4	1	2	15
Cambridge Park	79	51	34	48	34	9	37	293
Claremont Meadows	2	4	4	10	10	2	3	36
Colyton	33	22	19	39	35	11	23	182
Cranebrook	113	88	112	242	283	86	127	1,051
Emu Heights	22	10	12	34	41	19	14	153
Emu Plains	229	77	46	62	73	30	119	635
Erskine Park	17	18	27	67	109	34	39	312
Glenmore Park	261	304	344	1,055	2,063	872	732	5,630
Jamisontown	284	215	209	279	172	41	121	1,321
Kingswood	415	235	208	238	157	20	184	1,457
Leonay	4	3	2	6	14	10	6	45
North St Marys	7	4	3	5	4	1	4	27
Oxley Park	124	95	72	118	65	12	74	560
Penrith	767	306	279	336	224	44	316	2,272
Regentville	4	6	3	10	12	4	6	45
South Penrith	28	18	17	30	41	15	20	171
St Clair	27	27	48	85	99	42	53	381
St Marys	712	310	290	255	152	12	286	2,018
Unclassified NSW	258	190	175	282	327	183	228	1,644
Werrington	154	89	81	128	72	4	111	639
Werrington County	23	2	2	4	6	2	3	42
Werrington Downs	0	0	0	1	1	0	0	3
Total	3,564	2,076	1,991	3,337	4,000	1,455	2,508	18,932

1.6 SCENARIO 4: PENRITH COUNCIL CURRENT DWELLING ESTIMATES FOR URBAN RELEASE AREAS

This scenario is based on Council's own planned development capacity at the present time. While these projections are not available on a suburb basis, they are available at a less detailed spatial level using Council's own 'Urban Release Area' classification.

Assumptions made for this Scenario include:

- Dwelling estimates are those provided by Penrith Council. We assume that all future development, both greenfield and in-fill development will occur before 2019.
- The Census categories of Semi Detached Dwellings and Flats/Units will be collectively referred to as Multi-Unit Dwellings

Under Scenario 4 assumptions it is expected that by 2019 there will be 76,377 dwellings in the Penrith LGA, an increase of 20,032 dwellings on 2001 figures (Table 1.23). This is expected to be from an increase of 5,170 single dwellings and 14,862 multi-unit dwellings. This projection therefore results in much greater numbers of multi-unit developments, with this type of dwelling accounting for almost three quarters of all currently planned development.

Household mix projections

With a large increase in multi-unit dwellings, it is anticipated that there will be a large increase in lone person households (Table 1.24). In fact, of the extra 20,032 households expected in 2019, a third (6,791) of these will be lone person households. A further 22 per cent (4,370) will be couples with children, while 17 per cent (3,330) will be couples without children and 17 per cent (3,366) one parent families. Proportionally, there will be a major shift towards lone person households away from couple households under Scenario 4 assumptions.

Overall, while half of the increase in separate houses will be occupied by couples with children, 42% of the increase in multi-unit dwellings will be occupied by lone person households (Table 1.25). Of the extra lone person households expected in 2019, 91% will reside in multi-unit dwellings. Similarly, 80% of the extra one parent families will reside in multi-unit developments.

Tenure mix projections

The modelling predicts that 40 per cent (8,026) of the 20,032 extra dwellings will be rented privately, 19 per cent (3,807) fully owned, 18 per cent (3,603) being purchased and 13 per cent (2,536) publicly rented (Table 1.26). However, it is highly unlikely that the latter will be achieved given current public housing policies, although there may be scope for additionally community managed affordable housing being included in new developments over this time (for example at the ADI site). It is more likely that this amount will be largely accounted for by a further number of private rented homes, given the high proportions of multi-unit dwellings this scenario produces. Overall, therefore, the large increase in private rental is due to the larger increase in multi-unit dwellings expected over the period. Proportionally, Table 1.27 shows the

significant shift towards private rental under this Scenario, with 92 per cent of the projected increase in renters being accommodated in the multi-unit sector.

Income mix projections

Proportionally, there will be a shift towards lower income households in Scenario 4. The larger number of multi-unit dwellings also results in a lower income profile among the new stock. Of the extra 20,032 dwellings expected by 2019 under Scenario 4 assumptions, 23 per cent (4,655) will be occupied by very low income households, which compares to a current proportion of 13 per cent across Penrith as a whole (Table 1.28). At the other end, only 4 per cent will have incomes over \$2,000 per week, compared to 9 per cent overall in Penrith today.

For those households in the 5,170 extra separate houses, 2,813 (55%) will be from the moderate to very high income groups (Table 1.29). Conversely, 7,761 (52%) households in the additional multi-unit dwellings will be from the very low to low-moderate income groups. In fact, of the additional 4,655 very low income households 4,096 (88%) will reside in multi-unit dwellings, compared to only 34 per cent of household earning over \$2,000 per week.

Overall therefore, there will be an increase in lower income households under Scenario 4 assumptions due to the larger increase in multi-unit dwellings, but the smaller increase in separate houses will be largely accounted for by higher income households.

The geography of change

While we have not projected these mixes by Urban Release Area, it will be clear from the dwelling mix shown in Table 1.30 that the areas with the majority of the planned new higher density development are likely to be associated with the increase multi-unit household profile. Almost half, (45 per cent) of the new higher density stock is planned for existing urban areas, and, given current zoning, will be concentrated in a limited number of older suburbs: Jamisontown, Oxley Park, St Marys, Penrith, Kingswood and Werrington, for example.

Nevertheless, the current density mix for the new release areas of North Penrith Urban Area, Penrith Lakes and the ADI all contain a significant number of higher density developments. While the projections based on current household, tenure and income mix suggests that new high density development in new release areas are likely to be taken up by lower income, smaller households who rent, the precise outcomes will depend greatly on the marketing position and the kind of higher density development that takes place.

Table 1.23: Estimated Number of Dwellings that could be potentially developed in Penrith to 2019 by Urban Release Area.

	Location	Type	Dwellings	%
Urban Release Areas	ADI (Penrith Component)	Single Dwellings	2,454	80.0
		Multi-Unit	614	20.0
		Total	3,068	100.0
	Caddens Release Area	Single Dwellings	910	70.0
		Multi-Unit	390	30.0
		Total	1,300	100.0
	Claremont Meadows Stage 2	Single Dwellings	390	78.0
		Multi-Unit	110	22.0
		Total	500	100.0
	Erskine Park (existing)	Single Dwellings	80	100.0
		Multi-Unit	0	0.0
		Total	80	100.0
	Glenmore Park (existing)	Single Dwellings	70	100.0
		Multi-Unit	0	0.0
		Total	70	100.0
	Glenmore Park Expansion Area	Single Dwellings	840	70.0
		Multi-Unit	360	30.0
		Total	1,200	100.0
	Lakes Environs	Single Dwellings	413	59.5
		Multi-Unit	281	40.5
		Total	694	100.0
	North Penrith Urban Area	Single Dwellings	28	3.3
		Multi-Unit	822	96.7
		Total	850	100.0
	Werrington Mixed Use Area	Single Dwellings	17	8.9
		Multi-Unit	173	91.1
		Total	190	100.0
	Penrith Lakes	Single Dwellings	2,940	60.0
		Multi-Unit	1,960	40.0
		Total	4,900	100.0
	Total	Single Dwellings	4,710	36.6
		Multi-Unit	8,142	63.4
		Total	12,852	100.0
Infill Development	Total	Single Dwellings	460	6.4
		Multi-Unit	6,720	93.6
		Total	7,180	100.0
Total New Stock (2001to 2019)		Single Dwellings	5,170	25.8
		Multi-Unit	14,862	74.2
		Total	20,032	100.0
Existing Stock (2001)		Single Dwellings	48,813	86.6
		Multi-Unit	7,532	13.4
		Total	56,345	100.0
Total Potential Stock (2119)		Single Dwellings	53,983	70.7
		Multi-Unit	22,394	29.3
		Total	76,377	100.0

Table 1.24: Estimated Change in Household type based on Scenario 4 estimates, 2001-2019

	2001	%	Estimated 2019	%	Difference 2001-2019	Percentage Point Change
Couple family with Children	24,934	43.9%	29,304	38.4%	4,370	-5.5%
Couple family without children	11,875	21.0%	15,205	19.9%	3,330	-1.1%
One parent family	7,819	13.8%	11,185	14.6%	3,366	0.8%
Lone person households	8,849	16.0%	15,640	20.5%	6,791	4.5%
Other	2,868	5.2%	5,043	6.6%	2,175	1.4%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.25: Estimated Change in Household type by Dwelling Type based on Scenario 4 estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Couple family with Children	2,543	1,827	4,370
Couple family without children	1,140	2,190	3,330
One parent family	684	2,682	3,366
Lone person households	605	6,186	6,791
Other	198	1,977	2,175
Total	5,170	14,862	20,032

Table 1.26: Estimated Change in Tenure based on Scenario 4 estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Fully Owned	18,298	32.5%	22,105	28.9%	3,807	-3.6%
Being Purchased	20,976	37.2%	24,579	32.2%	3,603	-5.0%
Rented from State Housing Authority	2,536	4.5%	5,072	6.6%	2,536	2.1%
Rented from Other Sources	10,746	19.1%	18,772	24.6%	8,026	5.5%
Other Tenure	1,207	2.1%	1,884	2.5%	677	0.4%
Not Stated	2,582	4.6%	3,965	5.2%	1,383	0.6%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.27: Estimated Change in Tenure by Dwelling Type based on Scenario 4 estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Fully Owned	1,832	1,975	3,807
Being Purchased	2,143	1,460	3,603
Rented from State Housing Authority	140	2,396	2,536
Rented from Other Sources	747	7,279	8,026
Other Tenure	97	580	677
Not Stated	211	1,172	1,383
Total	5,170	14,862	20,032

Table 1.28: Estimated Change in Household Income based on Scenario 4 estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Very low (Less than \$400)	7,358	13.2%	12,013	15.7%	4,655	2.5%
Low (\$400-\$599)	5,215	9.3%	7,604	10.0%	2,389	0.7%
Low-moderate (\$600-\$799)	5,413	9.6%	7,618	10.0%	2,204	0.4%
Moderate (\$800-\$1,199)	10,359	18.3%	13,379	17.5%	3,020	-0.8%
High (\$1,200-\$1,999)	13,116	23.1%	15,846	20.7%	2,730	-2.4%
Very high (\$2,000 or more)	4,969	8.7%	5,742	7.5%	773	-1.2%
Not Stated	9,915	17.8%	14,175	18.6%	4,260	0.8%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.29: Estimated Change in Household Type by Dwelling Type based on Scenario 4 estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Very low (Less than \$400)	559	4,096	4,655
Low (\$400-\$599)	448	1,941	2,389
Low-moderate (\$600-\$799)	481	1,724	2,204
Moderate (\$800-\$1,199)	988	2,032	3,020
High (\$1,200-\$1,999)	1,313	1,417	2,730
Very high (\$2,000 or more)	512	261	773
Not Stated	868	3,392	4,260
Total	5,170	14,862	20,032

1.7 SCENARIO 5 – SENSITIVITY TESTING

This section uses the development potential from Scenario 4, based on Council's current future development estimates, and changes the mix of separate houses and multi-unit development to test the social outcomes of different dwelling mixes. That is, in Scenario 4 it is estimated that by 2019 there will be an additional 20,032 dwellings, of which 5,170 (26 per cent) will be separate houses and 14,862 (74 per cent) will be multi-unit dwellings. However, different social outcomes may occur if the planned mix of dwelling types changes. The three scenarios presented in this chapter show the social effects of different dwelling mixes within the current planned development capacity of the district.

Scenario 5 uses three different dwelling mixes to examine the social outcomes in Penrith of future growth. The first, Scenario 5a, assumes an additional number of dwellings such that 50 per cent of new dwellings will be separate houses and 50 per cent will be multi-unit dwellings. Scenario 5b assumes 40 per cent of additional dwellings will be separate houses and 60 per cent will be multi-unit dwellings. Finally, Scenario 5c assumes 60 per cent of additional dwellings will be separate houses and 40 per cent will be multi-unit dwellings. It should be noted that none of these projected dwelling mixes get near to the prevailing (2001) dwelling mix of 85 per cent separate houses and 15 per cent multi-unit dwellings or other dwellings.

SCENARIO 5A: 50 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 50 PER CENT ARE MULTI-UNIT DWELLINGS

Under Scenario 5a assumptions we would expect an extra 10,016 separate houses and 10,016 multi-unit dwellings in Penrith in 2019 (Table 1.30). Thus, by 2019 there would be 58,829 (77 per cent) separate houses and 17,548 (23 per cent) multi-unit dwellings. This represents a 21 per cent increase in separate houses between 2001 and 2019, but a 133 per cent increase in multi-unit dwellings.

Table 1.30: Estimated Number of Dwellings in 2019 based on Scenario 5a Assumptions

	Estimated Number of Dwellings in 2019 under Scenario Assumptions	Dwellings in 2001	Absolute Change 2001-2019	Percentage Change 2001-2019
Separate Houses	58,829	48,813	10,016	20.5%
Multi-Unit Dwellings	17,548	7,532	10,016	133.0%
Total	76,377	56,345	20,032	35.6%

Household Mix Projections

Based on the projected number of dwellings in 2019 under Scenario 5a, we would expect an increase of 6,158 couples with children, 5,341 lone person households, 3,685 couples without children, 3,133 one parent families (Table 1.31). By 2019, couples with children would still be the predominant household type in Penrith,

constituting 41 per cent of all households, with significant proportions of couples without children (20 per cent) and lone person households (19 per cent). Between 2001 and 2019 this represents a shift away from couples with children towards lone person households, with minimal changes in couples without children and one parent families.

Of the extra couples with children expected in Penrith in 2019 under this Scenario, 4,926 (80 per cent) could be expected to live in separate houses (Table 1.32). This also constitutes 49 per cent of the estimated increase in separate houses. Similarly, of the extra couples without children, 2,209 (60 per cent) will reside in separate houses. Conversely, 4,169 (78 per cent) of the extra lone person households, are expected to reside in multi-unit dwellings.

Table 1.31: Estimated Change in Household type based on Scenario 5a estimates, 2001-2019

	2001	%	Estimated 2019	%	Difference 2001-2019	Percentage Point Change
Couple family with Children	24,934	43.9%	31,092	40.7%	6,158	-3.2%
Couple family without children	11,875	21.0%	15,560	20.4%	3,685	-0.6%
One parent family	7,819	13.8%	10,952	14.3%	3,133	0.5%
Lone person households	8,849	16.0%	14,190	18.6%	5,341	2.6%
Other	2,868	5.2%	4,583	6.0%	1,715	0.8%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.32: Estimated Change in Household type by Dwelling Type based on Scenario 5a estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Couple family with Children	4,926	1,231	6,158
Couple family without children	2,209	1,476	3,685
One parent family	1,326	1,807	3,133
Lone person households	1,172	4,169	5,341
Other	383	1,332	1,715
Total	10,016	10,016	20,032

Tenure Mix Projections

Between 2001 and 2019 we anticipate that under Scenario 5a assumptions an extra 6,353 households will rent privately in Penrith (Table 1.33). An extra 5,136 households will be purchasers and an extra 4,880 will be owner-occupiers. At 2019, 34 per cent of households will be purchasers, 30 per cent owner-occupiers and 33 per cent private renters. Over the period this represents a proportional shift away from owner-occupiers and purchasers towards private renters, under Scenario 5a assumptions.

Owner-occupiers and purchasers are anticipated to account for 77 per cent of the extra separate houses in Penrith (Table 34). However, of the extra 6,353 private renters, 4,906 (77 per cent) are expected to reside in multi-unit dwellings. In fact, of the extra 10,016 multi-unit dwellings, 49 per cent are anticipated to be accommodated by private renters under this Scenario.

Table 1.33: Estimated Change in Tenure based on Scenario 5a estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Fully Owned	18,298	32.5%	23,179	30.3%	4,880	-2.2%
Being Purchased	20,976	37.2%	26,112	34.2%	5,136	-3.0%
Rented from State Housing Authority	2,536	4.5%	4,422	5.8%	1,886	1.3%
Rented from Other Sources	10,746	19.1%	17,099	22.4%	6,353	3.3%
Other Tenure	1,207	2.1%	1,785	2.3%	578	0.2%
Not Stated	2,582	4.6%	3,780	4.9%	1,198	0.3%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.34: Estimated Change in Tenure by Dwelling Type based on Scenario 5a estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Fully Owned	3,549	1,331	4,880
Being Purchased	4,152	984	5,136
Rented from State Housing Authority	271	1,615	1,886
Rented from Other Sources	1,448	4,906	6,353
Other Tenure	187	391	578
Not Stated	408	790	1,198
Total	10,016	10,016	20,032

Income mix projections

Under Scenario 5a assumptions by 2019, there will be an extra 3,844 very low income households, 3,499 high income households, 3,284 moderate income households and just over 2,000 low and low-moderate income households (Table 1.35). By 2019 in Penrith, high income households would constitute the largest income group (22 per cent of households), 18 per cent would be moderate income households, 15 per cent very low income households, with low, low-moderate and very high income households all constituting less than 10 per cent, respectively, of households.

As in earlier scenarios, the increase in separate houses will largely be fuelled by those in the higher income brackets, whereas, those in the lower income brackets will tend to be accommodated in multi-unit developments under this Scenario. Of the extra 10,016 separate houses 54 per cent would be occupied by those on moderate incomes or above. Conversely, 52 per cent of multi-unit developments would be occupied by those on low-moderate incomes or below. In fact, 72 per cent of the extra very low income households, 60 per cent of low income households and 56 per cent of low-moderate income households would reside in multi-unit dwellings, whereas 85 per

cent of the extra very high income households, 73 per cent of high income households and 58 per cent of low-moderate income households would reside in separate houses.

Table 1.35: Estimated Change in Household Income based on Scenario 5a estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Very low (Less than \$400)	7,358	13.2%	11,202	14.7%	3,844	1.5%
Low (\$400-\$599)	5,215	9.3%	7,391	9.7%	2,176	0.4%
Low-moderate (\$600-\$799)	5,413	9.6%	7,506	9.8%	2,093	0.2%
Moderate (\$800-\$1,199)	10,359	18.3%	13,643	17.9%	3,284	-0.4%
High (\$1,200-\$1,999)	13,116	23.1%	16,615	21.8%	3,499	-1.3%
Very high (\$2,000 or more)	4,969	8.7%	6,137	8.0%	1,168	-0.7%
Not Stated	9,915	17.8%	13,883	18.2%	3,968	0.4%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.36: Estimated Change in Household Type by Dwelling Type based on Scenario 5a estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Very low (Less than \$400)	1,084	2,760	3,844
Low (\$400-\$599)	868	1,308	2,176
Low-moderate (\$600-\$799)	932	1,162	2,093
Moderate (\$800-\$1,199)	1,914	1,370	3,284
High (\$1,200-\$1,999)	2,544	955	3,499
Very high (\$2,000 or more)	992	176	1,168
Not Stated	1,682	2,286	3,968
Total	10,016	10,016	20,032

SCENARIO 5B: 40 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 60 PER CENT ARE MULTI-UNIT DWELLINGS

Based on Scenario 5b assumptions it is expected by 2019 in Penrith there will be 56,826 separate houses and 19,551 multi-unit dwellings (Table 1.37). Multi-unit dwellings would account for 26 per cent of the total stock. This represents an increase of 8,013 separate houses and 12,019 multi-unit dwellings on the 2001 situation with a 16 per cent increase in separate houses and a 160 per cent increase in multi-unit dwellings.

Table 1.37: Estimated Number of Dwellings in 2019 based on Scenario 5b Assumptions

	Estimated Number of Dwellings in 2019 under Scenario Assumptions	Dwellings in 2001	Absolute Change 2001-2019	Percentage Change 2001-2019

Separate Houses	56,826	48,813	8,013	16.4%
Multi-Unit Dwellings	19,551	7,532	12,019	159.6%
Total	76,377	56,345	20,032	35.6%

Household Mix Projections

Under Scenario 5b assumptions we would expect an increase of 5,941 lone person households by 2019, 5,419 couples with children, 3,538 couples without children and 3,229 one parent families (Table 1.38). Despite the large increase in lone person households, couples with children (40 per cent) will again be the predominant household type under this Scenario. Couples without children are anticipated to constitute 20 per cent of households in 2019 while lone person households will constitute 19 per cent of all households. Proportionally, there will be a marginally greater shift away from couples with and without children towards lone person households under this Scenario compared to Scenario 5a.

Of the extra 5,941 lone person households, 5,003 (84 per cent) are expected to reside in multi-unit dwellings. Further, 67 per cent of one parent families are also anticipated to reside in multi-unit dwellings. Conversely, 73 per cent of couples with children are anticipated to reside in separate houses. Unlike other Scenarios, only 50 per cent of couples without children are expected to live in separate houses in 2019 under this Scenario. Moreover, 60 per cent of the increase in multi-unit dwellings is anticipated to be occupied by lone person households and one parent families.

Table 1.38: Estimated Change in Household type based on Scenario 5b estimates, 2001-2019

	2001	%	Estimated 2019	%	Difference 2001-2019	Percentage Point Change
Couple family with Children	24,934	43.9%	30,353	39.7%	5,419	-4.2%
Couple family without children	11,875	21.0%	15,413	20.2%	3,538	-0.8%
One parent family	7,819	13.8%	11,048	14.5%	3,229	0.7%
Lone person households	8,849	16.0%	14,790	19.4%	5,941	3.4%
Other	2,868	5.2%	4,773	6.2%	1,905	1.0%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.39: Estimated Change in Household type by Dwelling Type based on Scenario 5b estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Couple family with Children	3,941	1,478	5,419
Couple family without children	1,767	1,771	3,538
One parent family	1,060	2,169	3,229
Lone person households	938	5,003	5,941
Other	306	1,599	1,905
Total	8,013	12,019	20,032

Tenure Mix Projections

Between 2001 and 2019 there will be an increase of 7,045 private renters, 4,437 owner-occupiers, and 4,503 purchasers under Scenario 5b assumptions (Table 1.40). Purchasers will constitute 33 per cent of all households, whereas, owner-occupiers and private renters will represent 30 per cent and 23 per cent respectively. However, under Scenario 5b there will be a significantly greater proportional shift away from purchasers and owner-occupiers towards private renters.

Of the 7,045 extra private renters expected in Penrith by 2019, 5,887 (84 per cent) will reside in multi-unit dwellings, whereas, 2,829 (64 per cent) owners and 3,322 (74 per cent) purchasers are anticipated to reside in separate houses (Table 1.41). Further, of the extra 8,013 separate houses expected in 2019, 77 per cent will be occupied by owners and purchasers. Of the extra 12,019 multi-unit dwellings expected under this Scenario, 49 per cent are anticipated to be occupied by private renters.

Table 1.40: Estimated Change in Tenure based on Scenario 5b estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Fully Owned	18,298	32.5%	22,735	29.8%	4,437	-2.7%
Being Purchased	20,976	37.2%	25,479	33.4%	4,503	-3.8%
Rented from State Housing Authority	2,536	4.5%	4,691	6.1%	2,154	1.6%
Rented from Other Sources	10,746	19.1%	17,791	23.3%	7,045	4.2%
Other Tenure	1,207	2.1%	1,826	2.4%	619	0.3%
Not Stated	2,582	4.6%	3,856	5.0%	1,274	0.4%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.41: Estimated Change in Tenure by Dwelling Type based on Scenario 5b estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Fully Owned	2,839	1,597	4,437
Being Purchased	3,322	1,181	4,503
Rented from State Housing Authority	217	1,937	2,154
Rented from Other Sources	1,158	5,887	7,045
Other Tenure	150	469	619
Not Stated	326	948	1,274
Total	8,013	12,019	20,032

Income Mix Projections

By 2019 the high income group will constitute 21 per cent of all households, with moderate income households and very low income households will constitute 18 per cent and 15 per cent of households respectively (Table 1.42). However, the very low income group has the largest increase (4,179) under this Scenario. Under this Scenario, then, there will be a proportionally greater shift away from the high and moderate income groups towards the lower income groups compared to Scenario 5b.

Some 79 per cent of households with very low incomes are expected to occupy multi-unit dwellings (Table 1.43). Similarly, 69 per cent of low income households and 65 per cent of low-moderate income households are expected to reside in multi-unit dwellings. However, 79 per cent of the extra very high income households, and 64 per cent of high income households are anticipated to reside in separate houses. Of the extra 8,103 extra separate houses expected by 2019, 55 per cent will be occupied by households on moderate incomes or above. Conversely, 52 per cent of households with below moderate incomes will occupy multi-unit dwellings.

Table 1.42: Estimated Change in Household Income based on Scenario 5b estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Very low (Less than \$400)	7,358	13.2%	11,537	15.1%	4,179	1.9%
Low (\$400-\$599)	5,215	9.3%	7,479	9.8%	2,264	0.5%
Low-moderate (\$600-\$799)	5,413	9.6%	7,552	9.9%	2,139	0.3%
Moderate (\$800-\$1,199)	10,359	18.3%	13,534	17.7%	3,175	-0.6%
High (\$1,200-\$1,999)	13,116	23.1%	16,297	21.3%	3,181	-1.8%
Very high (\$2,000 or more)	4,969	8.7%	5,974	7.8%	1,005	-0.9%
Not Stated	9,915	17.8%	14,004	18.3%	4,088	0.5%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.43: Estimated Change in Household Type by Dwelling Type based on Scenario 5b estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Very low (Less than \$400)	867	3,312	4,179
Low (\$400-\$599)	695	1,569	2,264
Low-moderate (\$600-\$799)	745	1,394	2,139
Moderate (\$800-\$1,199)	1,531	1,643	3,175
High (\$1,200-\$1,999)	2,035	1,146	3,181
Very high (\$2,000 or more)	794	211	1,005
Not Stated	1,345	2,743	4,088
Total	8,013	12,019	20,032

SCENARIO 5C: 60 PER CENT OF NEW DWELLINGS ARE SEPARATE HOUSES AND 40 PER CENT ARE MULTI-UNIT DWELLINGS

Under Scenario 5c assumptions we would expect 60,832 separate houses and 15,545 multi-unit dwellings in 2019 in Penrith (Table 1.44). Multi-unit dwellings would account for 20 per cent of the total stock, with an increase of 12,109 separate houses and 8,103 multi-unit dwellings on the 2001 position. Between 2001 and 2019 this constitutes a 25 per cent increase in separate houses and a 108 per cent increase in multi-unit dwellings.

Table 1.44: Estimated Number of Dwellings in 2019 based on Scenario 5c Assumptions

	Estimated Number of Dwellings in 2019 under Scenario 5c	Dwellings in 2001	Absolute Change 2001-2019	Percentage Change 2001-2019
Separate Houses	60,832	48,813	12,019	24.6%
Multi-Unit Dwellings	15,545	7,532	8,103	107.6%
Total	76,377	56,345	20,032	35.6%

Household Mix Projections

Of the extra 20,032 households expected in Penrith in 2019 under this Scenario, 6,897 will be couples with children, 4,732 lone person households, 3,832 couples without children and 3,036 one parent families (Table 1.45). Couples with children will be the predominate household type in Penrith representing 42 per cent of all households, with couples without children and lone person households constituting a further 21 per cent and 18 per cent of households, respectively. Compared to the previous two Scenarios, this mix of dwellings results in a smaller proportional shift away from couples with and without children.

Of the extra 6,897 couples with children expected in Penrith in 2019 under Scenario 5c assumptions, 5,911 (86 per cent) will reside in separate houses (Table 1.46). Similarly, 69 per cent of the extra couples without children will reside in separate houses. These two household types only will constitute 71 per cent of the extra separate houses in Penrith in 2019. Conversely, 3,335 (70 per cent) of the 4,732 extra households expected in Penrith will reside in multi-unit dwellings. Lone person households themselves are anticipated to constitute 42 per cent of the extra multi-unit dwellings. Approximately half of one parent families will reside in separate houses with the half expected to reside in multi-unit dwellings.

Table 1.45: Estimated Change in Household type based on Scenario 5c estimates, 2001-2019

	2001	%	Estimated 2019	%	Difference 2001-2019	Percentage Point Change
Couple family with Children	24,934	43.9%	31,831	41.7%	6,897	-2.2%
Couple family without children	11,875	21.0%	15,707	20.6%	3,832	-0.4%
One parent family	7,819	13.8%	10,855	14.2%	3,036	0.4%
Lone person households	8,849	16.0%	13,591	17.8%	4,742	1.8%
Other	2,868	5.2%	4,393	5.8%	1,525	0.6%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.46: Estimated Change in Household type by Dwelling Type based on Scenario 5c estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Couple family with Children	5,911	985	6,897
Couple family without children	2,651	1,181	3,832
One parent family	1,591	1,446	3,036
Lone person households	1,407	3,335	4,742
Other	459	1,066	1,525
Total	12,019	8,013	20,032

Tenure Mix Projections

Under Scenario 5c assumptions we might expect that there will be similar increases in owner-occupiers, purchasers and private renters (Table 1.47). Purchasers will be the predominate tenure group in 2019 under this Scenario, representing 35 per cent of all households. Owner-occupiers and private renters will represent 31 per cent and 22 per cent of households. However, like other Scenarios there will be a proportional shift away from purchasers and owner-occupiers towards private renters, although at a lower rate.

Of the extra 5,324 owner-occupiers and 5,770 purchasers, 80 per cent and 86 per cent respectively, are anticipated to reside in separate houses under this Scenario (Table 1.48). Conversely, 3,925 (69 per cent) of the extra private renters are expected to reside in multi-unit dwellings. Owner-occupiers and purchasers are expected to only constitute 23 per cent of those households in multi-unit dwellings under this Scenario.

Table 1.47: Estimated Change in Tenure based on Scenario 5c estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Fully Owned	18,298	32.5%	23,622	30.9%	5,324	-1.6%
Being Purchased	20,976	37.2%	26,746	35.0%	5,770	-2.2%
Rented from State Housing Authority	2,536	4.5%	4,153	5.4%	1,617	0.9%
Rented from Other Sources	10,746	19.1%	16,408	21.5%	5,662	2.4%
Other Tenure	1,207	2.1%	1,745	2.3%	538	0.2%
Not Stated	2,582	4.6%	3,703	4.8%	1,121	0.2%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.48: Estimated Change in Tenure by Dwelling Type based on Scenario 5c estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Fully Owned	4,259	1,065	5,324
Being Purchased	4,983	787	5,770
Rented from State Housing Authority	325	1,292	1,617
Rented from Other Sources	1,738	3,925	5,662
Other Tenure	225	313	538
Not Stated	489	632	1,121
Total	12,019	8,013	20,032

Income Mix Projections

Between 2001 and 2019 under Scenario 5c assumptions we would expect an increase of 3,817 high income households, 3,509 very low income households, 3,393 moderate income households and just over 2,000 low and low-moderate income households (Table 1.49). The relative proportions of the various income groups are marginally different to those produced under the other two scenarios, but with a lower shift away for higher income groups. Very low income households will account for 14 per cent of all households, while very high income households would represent 8 per cent of the total, only marginally different to Scenario 5a.

Under this Scenario only 50 per cent of low income households and 45 per cent of low-moderate income households will reside in multi-unit dwellings, slightly lower than the percentages expressed in other Scenarios.

Table 1.49: Estimated Change in Household Income based on Scenario 5c estimates, 2001-2019

	2001	%	2019	%	Difference 2001-2019	Percentage Point Change
Very low (Less than \$400)	7,358	13.2%	10,867	14.2%	3,509	1.0%
Low (\$400-\$599)	5,215	9.3%	7,303	9.6%	2,088	0.3%
Low-moderate (\$600-\$799)	5,413	9.6%	7,460	9.8%	2,047	0.2%
Moderate (\$800-\$1,199)	10,359	18.3%	13,752	18.0%	3,393	-0.3%
High (\$1,200-\$1,999)	13,116	23.1%	16,933	22.2%	3,817	-0.9%
Very high (\$2,000 or more)	4,969	8.7%	6,300	8.2%	1,332	-0.5%
Not Stated	9,915	17.8%	13,762	18.0%	3,847	0.2%
Total	56,345	100.0%	76,377	100.0%	20,032	

Table 1.50: Estimated Change in Household Income by Dwelling Type based on Scenario 5c estimates, 2001-2019

	Separate Houses	Multi-Unit Dwellings	Total
Very low (Less than \$400)	1,301	2,208	3,509
Low (\$400-\$599)	1,042	1,046	2,088
Low-moderate (\$600-\$799)	1,118	929	2,047

Urban Growth Management in Penrith Stage 2 Report

Moderate (\$800-\$1,199)	2,297	1,096	3,393
High (\$1,200-\$1,999)	3,053	764	3,817
Very high (\$2,000 or more)	1,191	141	1,332
Not Stated	2,018	1,829	3,847
Total	12,019	8,013	20,032

1.8 PART 1: SUMMARY AND CONCLUSIONS

Introduction

Part 1 of this report has tested out seven different models of the future dwelling mix for Penrith, with a range of total dwelling outcomes and different house:multi-unit mix options. The aim has been to estimate the likely impact on the social profile of the Penrith area assuming current household, income and tenure profiles of the main dwelling types hold constant.

The seven Scenarios were:

- Scenario 1: Dwelling, household, tenure and income profiles based on ABS household projections to 2019 (based on an 85:15 house to multi-unit mix).
- Scenario 2: Dwelling, household, tenure and income profiles based on Historic Household Change Projections (based on a 77:22 house to multi-unit mix).
- Scenario 3: Suburb level projections based on recent development approval trends (based on a 50:50 house to multi-unit mix).
- Scenario 4: Projections based on Penrith Council current dwelling estimates for Urban Release Areas (based on a 26:74 house to multi-unit mix).
- Scenario 5a: Projections based on Penrith Council current dwelling estimates assuming 50 per cent of new dwellings are separate houses and 50 per cent are multi-unit dwellings.
- Scenario 5b: Projections based on Penrith Council current dwelling estimates assuming 40 per cent of new dwellings are separate houses and 60 per cent are multi-unit dwellings.
- Scenario 5c: Projections based on Penrith Council current dwelling estimates assuming 60 per cent of new dwellings are separate houses and 40 per cent are multi-unit dwellings.

Summary of main findings

Table 1.51 sets out a summary of the main findings from the various scenarios, with the overall impact of each scenario on the dwelling, household, tenure and income profile for the Penrith area in 2019. The following points can be made about these figures:

- The outturn numbers of dwellings/households varies from 75,277 for Scenario 3, based on recent DA approval rates, to 82,529 for the ABS household projection based Scenario 1. There are, therefore, several valid projection totals that might provide a guide to the likely dwelling outcomes over the next 20 years, assuming current planning policy settings remain constant.

- Within these total figure, the scenarios tests produced dwelling mixes that ranged from the prevailing (2001-based) mix of 87 per cent separate houses and 13 per cent multi-unit dwellings under Scenario 1 to a significantly different 71 to 29 per cent split under Scenario 4, which used Council's current planned dwelling mix targets for Urban Release Areas.
- Under the 'no change' Scenario 1, the number of multi-dwellings would increase by 3,326 dwellings, or 44 per cent. Under Scenario 4 the increase in multi-units would be 14,862, or almost 200 per cent.
- In terms of household profiles, households comprising couples and children remain the dominant household type in 2019 under all the scenarios tested. This group will retain a major presence in the area. Indeed, the proportion of family households with children varies only between 38 and 44 per cent at the extremes of the scenarios tested here. Clearly, the preponderance of separate dwellings in the existing stock and the current predominance on families in the area will remain a major defining factor in Penrith for some decades to come, assuming current trends.
- However, Council's current development mix, guided by prevailing State planning policy, will have a greater impact on the mix of households in the Penrith area. Scenario 4, which tests this outcome assuming a development outcome of 74:26 percent ratio of multi-units to separate house, results in a lower mix of couple households with or without children, and a much greater shift to single person households than the other scenarios. At the same time, there would be a proportionally greater shift to households renting privately and on lower incomes than other options.
- Trends based on the number of development approvals for the five years to 2003 suggest a greater rate of renewal or greenfield development will be needed over the next two decades to meet Council's own planning targets, let alone provide enough accommodation to meet the ABS household projections. In other words, development activity needs to increase across the area.

The geographical impact of densification

It might be reasonably argued that given the current predominance of separate houses in Penrith, even after two decades of higher density development, the impact of the various development mix options on the social profile of Penrith will be marginal. The overall social composition of the area will only show a modest amount of change.

However, these changes will not be distributed evenly over the whole Council area. The geography of the social impacts needs most careful consideration. Under current zoning and prevailing development activity (as evidenced by DA trends), the majority of the new multi-unit development would be concentrated in four suburbs which between themselves would account for almost three quarters (72 per cent) of new multi-unit development: Jamisontown, Kingswood, Penrith and St Mays. Four other suburbs would accommodate most of the remaining increase of higher density housing: Oxley Park, Emu Plains, Cambridge Park and Werrington, together accounting for 20 per cent.

On the other hand, planned development under the Council's Urban Release Area projections in some of the new Greenfield sites includes significant numbers of higher density housing. If this takes place, then there is a possibility of spreading the impact of higher density development more broadly across the urban area, with North Penrith Urban Area, Penrith Lakes and the ADI all containing a sizeable higher density component. Nevertheless, even under these proposals, almost half of the planned higher density occurs in a limited number of older suburbs and much of the Penrith area will remain low density. The danger is that high density concentrations in certain locations will offer the only alternative for those not wishing or unable to live in lower density suburbs.

What is clear is that, on current dwelling profiles, a significant increase in multi-unit development will be accompanied by an increase in lower income, smaller households renting from a private landlord. If the prevailing trend for new higher density development to pass principally into the investment market continues, then this will be an inevitable outcome. This may be seen to be a positive gain for more affordable housing for groups who are unlikely to compete with the higher cost separate housing currently being developed in the area.

On the other hand, it may be that promoting greater densification in some of the lower value areas already zoned for higher densities where there are already indications of a concentration of households with disadvantages (excluding the public housing areas) may only exacerbate these problems in the longer run. Once zoned for higher density, the market has only one signal it can respond to. All new development will take place to the highest density permitted. Just how far redevelopment will take place in areas zoned for high density housing is difficult to predict and will depend entirely on the predilections of the market, but the logic is that all available land will be redeveloped eventually. It may be that a more interventionist approach to manage higher density renewal in these areas may be necessary to avoid the negative social outcomes of a build up of lower income concentrations.

However, there is every possibility the new greenfield higher density development would be marketed at a home buyer market, for example, for older people trading down from a larger house, or for those looking for a town centre lifestyle in the case of the North Penrith redevelopment area. While there will certainly be demand from smaller households in Penrith, the current position is that the great majority of smaller (couple only and lone person) households still live in separate housing. This may, in part reflect the number of older couples whose children have left home, or the fact that there is a large private rental market in the separate house sector in Penrith, with relatively affordable rents (in relation to the rest of Sydney). Whether the provision of smaller housing in these new development areas will assist the more efficient use of stock by smaller households remains to be seen.

What happens to the dwellings they vacate in the process will also be important to monitor. For example, the provision of higher density good quality housing in new development or redevelopment areas could assist in freeing up some of the older low density suburbs for renewal if it were to be targeted at local older home owners. On the other hand, the provision of such opportunities might simply speed up the redevelopment of older areas to higher density as older home owners in these areas

move out to take advantage of housing opportunities in the newer suburbs that, under prevailing development approach, are effectively barred to them (there are few older or smaller households in the newest suburban developments)

A couple of caveats should also be stressed. This analysis ignores any changes that will occur in the existing stock, some of which will be affected by the rate and location of any new development and the mix of that development. As we have noted, a more rapid rate of densification in the older suburbs due to a market upturn might promote an even greater rate of change as the existing population moves away. It also assumes future development in new areas is known quantity. And the analysis crucially assumes that prevailing household, tenure and income propensities between dwelling types hold constant. As we have suggested, this might not be the case. Market of newly developed higher density housing, especially in Penrith town centre and on the new Greenfield developments might target new groups of the population that have are in different socio-demographic groupings.

There are many unknowns, especially in the way the market will behave over the next two decades (and all these changes rely on the market to drive them). Nevertheless, the scenario testing exercise presented in this report offers some indications as to what the likely social outcomes of a range of development and redevelopment options might have on Penrith's population under prevailing conditions. As we argued in our earlier report for Council, it may be that policies that encourage a broader spread of higher density housing, appropriate to the local area and planned to high urban design standards, may be preferable in spreading the 'load' of densification rather than the current policy of concentration in a limited number of broadly zoned areas. Such an alternative would need to be carefully appraised if it were to be adopted, however. The local impacts of higher density renewal in the older areas of Penrith and implications for local area planning are explored in more details in the Part 2 of the report.

Table 1.51: Summary of Changes to Household Type, Tenure and Income based on the Different Scenarios for Penrith

	Base Case 2001	Scenario 1 2019	Scenario 2 2021	Scenario 3 2019	Scenario 4 2019	Scenario 5a 2019	Scenario 5b 2019	Scenario 5c 2019
New dwelling mix (% separate houses to % multi-units)	85:15	85:15	77:23	50:50	26:74	50:50	40:60	60:40
Separate Houses	48,813 (87%)	70,368 (87%)	66,094 (85%)	58,293 (77%)	53,983 (71%)	58,829 (77%)	56,826 (74%)	60,832 (80%)
Multi-Unit Dwellings	7,532 (13%)	10,858 (13%)	12,077 (15%)	16,984 (23%)	22,394 (29%)	17,548 (23%)	19,551 (26%)	15,545 (20%)
Total Dwellings	57,249	82,529	79,601	75,277	76,377	76,377	76,377	76,377
Increase 2011 – 2019	n/a	25,280	22,352	18,789	20,032	20,032	20,032	20,032
Household Mix Projections								
<i>Couple family with Children</i>	43.9%	43.9%	43.1%	41.2%	38.4%	40.7%	39.7%	41.7%
<i>Couple family without children</i>	21.0%	21.0%	20.9%	19.6%	19.9%	20.4%	20.2%	20.6%
<i>One parent family</i>	13.8%	13.8%	13.9%	13.3%	14.6%	14.3%	14.5%	14.2%
<i>Lone person households</i>	16.0%	16.0%	16.7%	18.0%	20.5%	18.6%	19.4%	17.8%
<i>Other</i>	5.2%	5.2%	5.5%	7.9%	6.6%	6.0%	6.2%	5.8%
Tenure Mix Projections								
<i>Fully Owned</i>	32.4%	32.4%	31.9%	29.3%	28.9%	30.3%	29.8%	30.9%
<i>Being Purchased</i>	36.7%	36.7%	36.0%	35.3%	32.2%	34.2%	33.4%	35.0%
<i>Rented from State Housing Authority</i>	4.4%	4.4%	4.7%	5.1%	6.6%	5.8%	6.1%	5.4%
<i>Rented from Other Sources</i>	19.5%	19.5%	20.2%	23.0%	24.6%	22.4%	23.3%	21.5%
<i>Other/Not Stated</i>	7.0%	7.0%	7.2%	7.3%	7.7%	7.2%	7.4%	7.1%
Income Mix Projections								
<i>Very low (Less than \$400)</i>	13.2%	13.2%	13.6%	15.1%	15.7%	14.7%	15.1%	14.2%
<i>Low (\$400-\$599)</i>	9.3%	9.3%	9.4%	10.1%	10.0%	9.7%	9.8%	9.6%
<i>Low-moderate (\$600-\$799)</i>	9.6%	9.6%	9.6%	10.2%	10.0%	9.8%	9.9%	9.8%
<i>Moderate (\$800-\$1,199)</i>	18.3%	18.3%	18.1%	18.8%	17.5%	17.9%	17.7%	18.0%
<i>High (\$1,200-\$1,999)</i>	23.1%	23.1%	22.7%	23.5%	20.7%	21.8%	21.3%	22.2%
<i>Very high (\$2,000 or more)</i>	8.7%	8.7%	8.6%	8.8%	7.5%	8.0%	7.8%	8.2%
<i>Not Stated</i>	17.8%	17.8%	17.9%	13.6%	18.6%	18.2%	18.3%	18.0%

Note: Excludes 'Other Dwellings' and 'Not Stated' Dwelling categories.

APPENDIX 1: BASE CASE DATA TABLES

Table A1: Dwelling Type by Household Type in Penrith, 2001 (Cell percentages)

Cell percentages	Separate Houses	Semi Detached Dwellings	Flats in a block of less than 4 storeys	Flats in a block of 4 or more storeys	Other/Not Stated	Total
Couple family with children	41.9	1.1	0.4	0.0	0.4	43.9
Couple family without children	18.8	1.2	0.7	0.0	0.3	21.0
One parent family	11.3	1.6	0.7	0.1	0.1	13.8
Lone person households	10.0	2.2	3.1	0.2	0.6	16.0
Other	3.3	0.9	0.8	0.0	0.2	5.2
Total	85.3	7.0	5.8	0.4	1.6	100.0

Table A2: Dwelling Type by Household Type in Penrith, 2001 (Column percentages)

Column percentages	Separate Houses	Semi Detached Dwellings	Flats in a block of less than 4 storeys	Flats in a block of 4 or more storeys	Other/Not Stated	Total
Couple family with children	49.2	16.5	7.5	8.0	23.1	43.9
Couple family without children	22.1	16.6	12.9	9.2	17.7	21.0
One parent family	13.2	22.7	12.4	18.5	9.2	13.8
Lone person households	11.7	31.2	53.4	54.2	35.4	16.0
Other	3.8	13.1	13.8	10.0	14.6	5.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Table A3: Dwelling Type by Tenure in Penrith, 2001 (Cell percentages)

Cell percentages	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Fully Owned	30.2	0.9	0.9	0.4	32.4
Being Purchased	35.3	0.8	0.5	0.1	36.7
Rented from Public Landlord	2.3	1.2	0.9	0.0	4.4
Rented from Other Sources	12.3	3.4	3.0	0.7	19.5
Other Tenure	1.6	0.2	0.3	0.2	2.3
Not Stated	3.5	0.4	0.6	0.2	4.7
Total	85.3	7.0	6.2	1.6	100.0

Table A4: Dwelling Type by Tenure in Penrith, 2001 (Column percentages)

Column percentages	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Fully Owned	35.4	12.5	14.2	25.6	32.4
Being Purchased	41.5	11.8	7.7	5.9	36.7
Rented from Public Landlord	2.7	17.7	14.3	0.0	4.4
Rented from Other Sources	14.5	48.9	49.1	43.3	19.5
Other Tenure	1.9	2.8	5.1	11.9	2.3
Not Stated	4.1	6.4	9.5	13.4	4.7
Total	100.0	100.0	100.0	100.0	100.0

Table A5: Dwelling Type by Weekly Household Income in Penrith, 2001 (Cell percentages)

Cell percentages	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Less than \$400	9.2	1.6	2.0	0.4	13.2
\$400-\$599	7.4	0.8	0.9	0.2	9.3
\$600-\$799	7.9	0.8	0.7	0.1	9.6
\$800-\$1,199	16.3	1.1	0.7	0.2	18.3
\$1,200-\$1,999	21.7	0.9	0.3	0.2	23.1
\$2,000 or more	8.4	0.2	0.0	0.1	8.7
Not Stated	14.3	1.6	1.4	0.5	17.8
Total	85.3	7.0	6.2	1.6	100.0

Table A6: Dwelling Type by Household Income in Penrith, 2001 (Column percentages)

Column percentages	Separate House	Semi Detached Dwellings	Flats/Units	Other	Total
Less than \$400	10.8	22.7	33.0	23.3	13.2
\$400-\$599	8.7	11.9	14.3	11.4	9.3
\$600-\$799	9.3	11.4	11.9	7.7	9.6
\$800-\$1,199	19.1	15.5	11.6	11.2	18.3
\$1,200-\$1,999	25.4	13.1	5.5	12.2	23.1
\$2,000 or more	9.9	2.7	0.7	4.4	8.7
Not Stated	16.8	22.7	23.0	29.8	17.8
Total	100.0	100.0	100.0	100.0	100.0

PART 2

2 THE SOCIO-ECONOMIC CONSEQUENCES OF ALTERNATIVE HOUSING POLICIES IN OLDER HOUSING AREAS

2.1 INTRODUCTION

Part 2 of this report examines the socio-economic consequences of urban renewal in the older areas of Penrith in more detail. The research here begins with an exploration of the impacts of projected higher density renewal under the current zoning framework in two established areas in Penrith – Oxley Park and South Penrith, both in social terms and visually, in terms of the likely urban design outcomes. This is based on a land use survey of all the residential blocks in the chosen case study areas. The future social profile of these areas is projected assuming a 30% take up of blocks for renewal under current zoning arrangements and the associated visual outcome of this process is also presented.

After briefly considering what recent population trends imply for the future population in each suburb, the analysis then turns to focus on the characteristics of the higher density sector in Penrith, in particular, its socio-economic profile and the source of demand for this kind of housing. This analysis in turn informs the discussion of the likely outcomes of higher density renewal in Penrith and appropriate strategies for managing the growth of this sector presented in the concluding section.

2.2 THE LOCAL IMPACTS OF URBAN RENEWAL

In order to assess the impacts of higher density renewal at the local scale, a detailed analysis of Oxley Park and South Penrith suburbs was undertaken. This analysis involved an initial intensive land use survey of the two areas to determine current uses and building types. This section presents the results of this exercise and leads into the analysis in the following section of projected impacts. The survey also illustrates a simple method by which Council could develop a detailed residential land use database for monitoring and assessing renewal activity into the future.

The residential land use survey was conducted in October 2004 through a ‘drive-by’ survey of all residential properties in the Oxley Park and South Penrith case study areas (Figures 2.2 and 2.3 indicate the case study areas). The survey data on dwelling characteristics (dwelling type, building materials, properties for sale or lease) was then matched to the land use cadastre and residential zoning map for the area. In this way, a comprehensive land use database was developed that could be mapped as well as interrogated by statistical analysis.

Housing Type

Oxley Park comprised 714 blocks or parcels of land of which 696 contained some type of housing structure (Table 2.1 and Figure 2.1). Some 90% of the blocks had separate houses, whilst multi-units accounted for 6% of the remaining residential blocks and dual-occupancy accounted for 2% of these blocks. The remaining 2% were vacant awaiting redevelopment. Higher density redevelopment had taken place

in a number of clusters, some associated with the larger blocks, but also around walk up flats close to Ridge Park off the Great Western Highway and the emerging town house strip at the eastern end of Brisbane Street. There is also evidence that several medium density redevelopments have involved the combination of two or three single house plots to allow larger number of dwellings.

There were significantly more residential parcels in the five South Penrith collector districts surveys for this study than in Oxley Park. Of the 1168 blocks in the South Penrith case study areas with housing on them, 1154 (99%) had separate houses, whilst only 4 blocks (0.3%) were dual occupancy properties and 7 blocks (0.6%) were multi-unit blocks. These data are mapped in Figures 2.2 and 2.3.

Table 2.1: Housing types on blocks of land in Oxley Park and South Penrith, 2004

Housing type	Oxley Park		South Penrith	
	Number	%	Number	%
Separate House	641	89.8%	1,154	98.8%
Dual Occupancy	13	1.8%	4	0.3%
Multi-unit	42	5.9%	7	0.6%
Vacant	18	2.5%	3	0.3%
Total	714	100%	1,168	100%

*Combined blocks have been included as one block

Figure 2.1: Housing types on blocks of land in Oxley Park and South Penrith

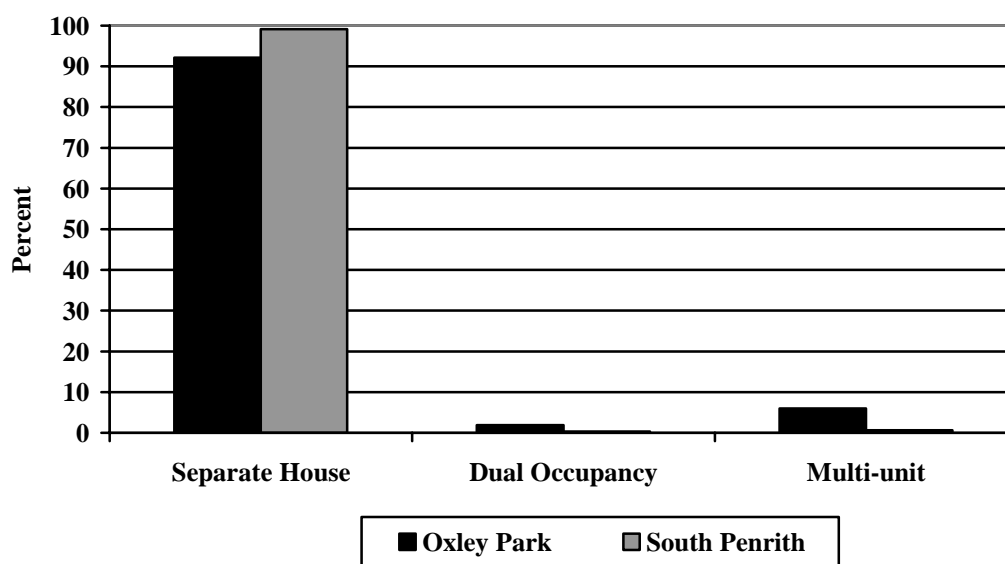


Figure 2.2: Dwelling type of blocks in Oxley Park, 2004

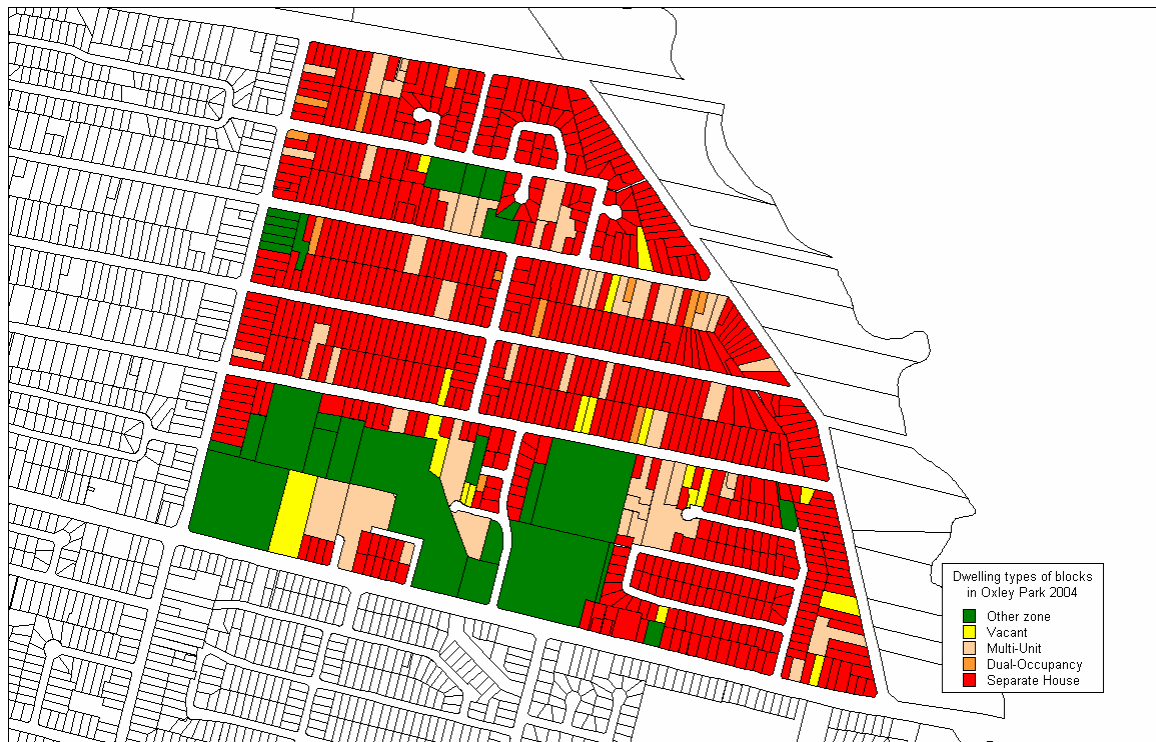


Figure 2.3: Dwelling types of blocks in South Penrith, 2004



Building materials of separate houses

Building materials varied significantly between the two suburbs. For just over half of the separate houses in Oxley Park (53.4% or 342), the main building material was brick, whilst in South Penrith, brick buildings accounting for 80.7% or 931 of the separate houses (Table 2.2, Figure 2.4). Weatherboard was used as the main building material in 32% (205) of separate houses in Oxley Park compared to only 11.5% or 133 separate houses in South Penrith. The main building material for 14.7% (94) of the separate houses in Oxley Park was fibro. In South Penrith however, only 7.8% (90) of the separate houses were fibro.

Table 2.2: Separate house types in Oxley Park and South Penrith

Separate House type	Oxley Park		South Penrith	
	Number	%	Number	%
Brick	342	53.4%	931	80.7%
Weatherboard	205	32%	133	11.5%
Fibro	94	14.7%	90	7.8%
Total	641	100.0%	1154	100%

Figure 2.4: Main building materials of separate house types in Oxley Park and South Penrith, 2004

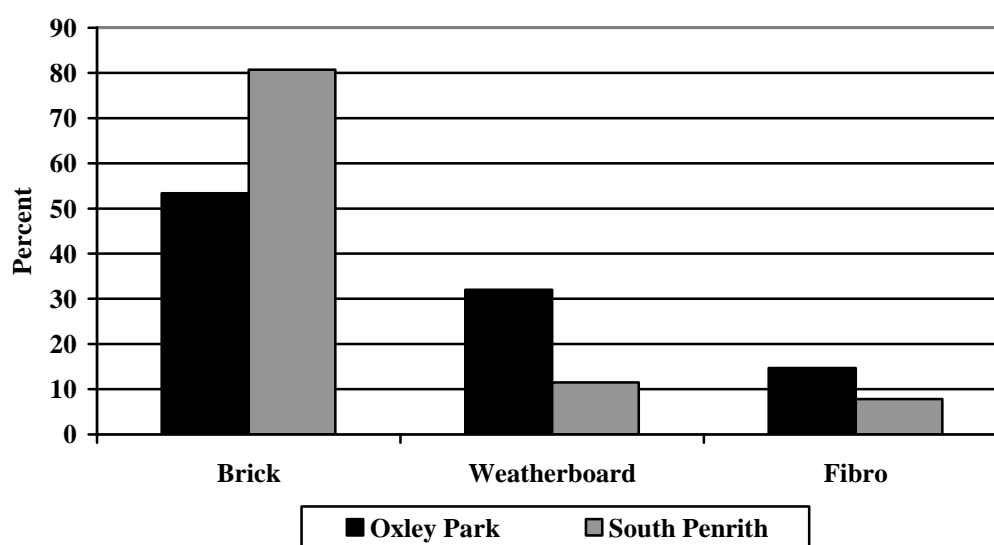


Figure 2.5: Main building materials of separate houses in Oxley Park, 2004



Figure 2.6: Main building materials of separate houses in South Penrith, 2004



Multi-Unit Blocks

Within Oxley Park there were 310 units covering 42 blocks of land. This gave an average of 7.4 units per multi-unit block, with the average unit size of 328.4m². The minimum unit size in Oxley Park was 179.9m² whilst the maximum unit size was 670.0m². A much smaller number of units were reported in South Penrith, with only 41 units on 7 multi-unit blocks, with the number of units per block averaging 5.9. Unit sizes were much smaller in South Penrith in comparison to Oxley Park, with the minimum unit size being 146.8m² and the maximum size being 313.8m². The mean unit size in South Penrith was consequently smaller at 193.9m².

Table 2.3: Multi-unit blocks in Oxley Park and South Penrith

Multi-unit blocks	Oxley Park	South Penrith
Number of multi-unit blocks included	42	7
Number of units included	310	41
Mean no. of units in multi-unit block	7.38	5.86
Minimum unit size	179.9m ²	146.85m ²
Maximum unit size	669.95m ²	313.78m ²
Mean unit size	328.4m ²	193.88m ²

* Combined blocks have been included in calculations

Zoning

The differences in the mix of dwelling types in each area reflected different zoning codes. South Penrith was zoned 2b, which permits only low density development, including single detached housing and low rise dual occupancy development. Here, the only higher density housing appears to have predated the designation of zoning. In contrast, much of Oxley Park is zoned 2c, which permits low-medium density development. Properties in this zone can be single detached housing, dual occupancy or of medium density development (i.e. townhouses and villa units).

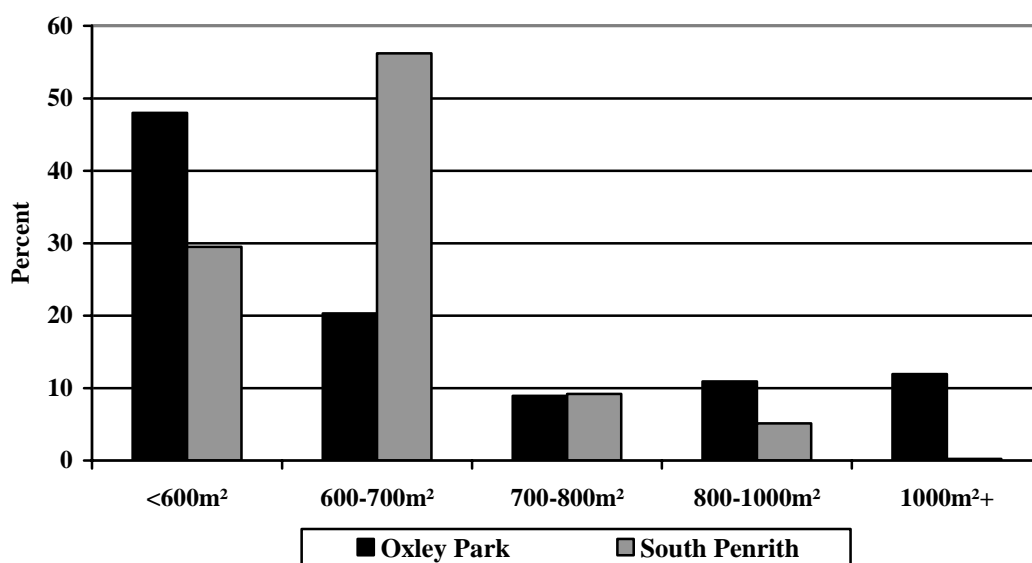
2b Zoned Areas

In Oxley Park, 28% (197) of blocks were zoned as 2b, with almost half of these (48.7%) being less than 600m². Blocks sized 600-700m² and 700-800m² made up 20.8% (41) and 8.1% (16) of 2b zoned blocks respectively. There was a significant number of relatively large 2b zoned blocks in Oxley Park. Blocks sized 800-1000m² and 1000m² or more accounted for 10.2% (20) and 12.2% (24) respectively (Table 2.4). In South Penrith, only 29.5% (344) of 1168 2b zoned blocks were less than 600m², whilst over half (656) of the 2b zoned blocks were sized between 600m² and 700m². Only 15% (168) of 2b zoned blocks in South Penrith were sized over 700m² (and only 2 were over 1000m².)

Table 2.4: 2b zoned blocks in Oxley Park and South Penrith

2b zoned blocks (size)	Oxley Park		South Penrith	
	Number	%	Number	%
< 600m ²	96	48.7%	344	29.5%
600-700m ²	41	20.8%	656	56.2%
700-800m ²	16	8.1%	107	9.2%
800-1000m ²	20	10.2%	59	5.1%
1000m ² +	24	12.2%	2	0.2%
Total	197	100%	1168	100%

Figure 2.7: Comparison of 2b zoned block sizes in Oxley Park and South Penrith



Turning to the building materials of 2b zoned dwellings, in Oxley, there were 93 separate brick houses, 10 separate fibro houses and 77 weatherboard houses, with the remaining properties being 9 multi-unit blocks and 8 vacant blocks of land. In South Penrith in 2b zoned blocks, there were 931 separate brick houses, 90 fibro houses and 133 weatherboard. There were also 4 dual occupancies, 7 multi-unit blocks and 3 vacant lots.

Table 2.5: Property type on 2b zoned blocks in Oxley Park and South Penrith

Property Type	Oxley Park	South Penrith
Separate House-Brick	93	931
Separate House-Fibro	10	90
Separate House-Weatherboard	77	133
Dual Occupancy	0	4
Multi-Unit	9	7
Vacant	8	3
Total	197	1168

2c Zoned Blocks

There was no 2c zoning in South Penrith. In contrast, 2c zoning in Oxley Park was extensive. Many of the large blocks in Oxley Park were zoned as 2c, with 41.6% (215) of the 517 2c blocks being between 1000m² and 1200m² and 9.9% (51) being 1200m² and over (Table 2.6). Blocks less than 600m² accounted for only 14.9% (77) of 2c zoning in Oxley Park, while 600-700m² blocks accounted for 15.1% (78) and 700-800m² for 6.8% (35). Relatively large blocks in the 800-1000m² range represented 11.8% (61) of 2c zoned blocks.

Table 2.6: 2c zoned blocks in Oxley Park

2c zoned blocks (size)	Number	%
< 600m ²	77	14.9%
600-700m ²	78	15.1%
700-800m ²	35	6.8%
800-1000m ²	61	11.8%
1000-1200m ²	215	41.6%
1200m ² +	51	9.9%
Total	517	100%

The build type of properties that occupied the 2c zoned blocks in Oxley Park varied considerably, with a total of 517 blocks occupied with housing, or having the potential for housing (vacant). Brick separate houses represented 249 properties, whilst 84 properties were fibro separate houses and 128 were weatherboard separate houses (Table 2.7). There were 33 blocks (including combined blocks) on which there were multi-units, whilst on 13 blocks there were dual occupancies, leaving 10 blocks that were vacant.

Table 2.7: Property type on 2c zoned blocks in Oxley Park

Dwelling Type	Oxley Park
Separate House-Brick	249
Separate House-Fibro	84
Separate House-Weatherboard	128
Dual Occupancy	13
Multi-Unit	33
Vacant	10
Total	517

Properties for Sale and Lease

When the drive by was being conducted a record was kept as to whether there was a 'for lease' or 'for sale' sign visible at the property. There were 24 properties for sale and 3 properties for lease in Oxley Park. Separate houses represented the majority of those properties with 17 separate houses for sale and 2 separate houses for lease. There was only 1 dual-occupancy property for sale, whilst 5 multi-units were for sale and 1 for lease. Furthermore, 1 vacant block of land was for sale. In South Penrith there were 23 separate houses for sale, but only 1 for lease. There were no dual occupancy properties for sale or lease and only 1 multi-unit for sale and 1 for lease. There were no vacant properties for sale or for lease.

An interesting feature of Figure 2.8 is the cluster of sales in the eastern Brisbane Street town house strip, including three houses adjacent to new multi-unit developments. It is likely these house plots will undergo redevelopment to multi-unit dwellings as a result. It is also evidence that house owners in areas of multi-unit development appear to be deciding to "vote with their feet" in reaction to such redevelopment, and possibly in response to a perception that the redevelopment has led to an increase in the values of their property.

Table 2.8: Tenure type of properties for sale/lease in Oxley Park and South Penrith

Tenure type	Oxley Park		South Penrith	
	For Sale	For Lease	For Sale	For Lease
Separate House	17	2	23	1
Dual Occupancy	1	0	0	0
Multi-unit	5	1	1	1
Vacant	1	0	0	0
Total	24	3	24	2

Figure 2.8: Properties for sale or lease in Oxley Park (Penrith), 2004



Figure 2.9: Properties for sale and lease in South Penrith, 2004



Comment

The analysis of distribution of redevelopment activity in Oxley Park illustrates a interesting issue. The concentration of villa and townhouse redevelopment activity and associated house sales along the eastern end of Brisbane Street suggests that a 'block busting' effect is taking place in this area. Here, redevelopment of blocks of land proceeds along a strip as developers move in, home owners either move out in reaction to the redevelopment process, or wish to cash in on perceived higher property values resulting from adjacent redevelopment, or are approached by developers to sell out. Either way, vacancies occur along the strip and redevelopment proceeds in a 'domino' effect. This is very much the way higher density redevelopment in places like Fairfield and Lakemba took place in the past, resulting in strips of walk-up flats. A similar process, and presumably outcome, is happening here

It seems clear from the analysis of the block size distribution of the two residential density zones that each of the 2b and 2c zones contain a significant overlap in terms of the sizes of residential blocks. For example, in the Oxley Park area, 15% of blocks zoned 2c were under 600m², accounting for 77 blocks in all. On the other hand, 61 blocks in South Penrith were over 800m². The former would presumably be unsuitable for higher density zoning without site amalgamation, while the latter might be suitable for higher density housing of some form. Whether a more fine-tuned approach to zoning blocks for higher density housing might be possible based on block size and capacity to provide a more appropriate zoning framework should be considered by Council, thereby allowing more dispersed redevelopment of higher density housing across these suburbs, rather than concentrated in certain areas.

The analysis of the building materials used in each area prompts consideration of the need for better understanding of the quality of the stock zoned for redevelopment. It might be considered that fibro and weatherboard houses may have shorted life cycles than those made of brick, or be more suitable for redevelopment due to poorer build quality and sustainability features. It may be worthwhile considering whether this factor might be used to guide redevelopment decisions.

Finally, the use of the drive-by survey of the kind completed for this analysis should be considered by Council for other areas subject to renewal pressure in order to improve the quality of the property data held on the City's housing stock on a cadastre basis. Such information would greatly aid decisions concerning future redevelopment proposal for the older parts of the City. Once completed, it could be automatically updated for new dwelling approvals and completions as they occur.

2.3 ANALYSIS OF THE FUTURE SOCIAL PROFILE FOR OXLEY PARK AND SOUTH PENRITH

Introduction

The current Residential Plan for Penrith assumes that the likely take up rate of redevelopment in suburbs zoned for higher density will be 30% over the lifetime of the Plan. This section presents an analysis of the likely physical and social outcomes of redevelopment to this level in the two case study areas, given the current social and tenure profiles of higher density housing in both suburbs. The aim, therefore, is to give an indication for each area of what might happen to each community from higher density redevelopment currently allowed for under the Residential Plan.

The analysis first sets out an estimate of the dwelling numbers resulting from a 30% redevelopment rate. It then provides estimates of the social outcomes in terms of a limited set of indicators: the age of household reference person (the person who is listed first on the census form), household type, household income, dwelling tenure and car ownership numbers for each area. The third section sets out a graphic illustration of the likely outcomes of renewal in urban design terms, with computer generated 3-D profiles of each areas assuming a random distribution of development across each area to 30% of available blocks.

The baseline data for this analysis are set out in Tables 2.9 and 2.10. These show the distribution of residential blocks and dwelling numbers in the two case study areas by dwelling type and planning zone. In all, 180 zone 2b blocks and 461 zone 2c blocks are available for higher density redevelopment in Oxley park (i.e. they are occupied by single dwellings), as are 1,154 single house blocks in South Penrith.

Table 2.9: Residential parcels of land in Oxley Park and South Penrith by housing type by zoning

	Oxley Park			South Penrith		
	Zone 2B	Zone 2C	Total	Zone 2B	Zone 2C	Total
Separate House (Brick)	93	249	342	931	0	931
Separate House (Fibro)	10	84	94	90	0	90
Separate House (Weatherboard)	77	128	205	133	0	133
<i>Separate Houses</i>	<i>180</i>	<i>461</i>	<i>641</i>	<i>1,154</i>	<i>0</i>	<i>1,154</i>
Multi-Unit Dwellings	9	33	42	7	0	7
Dual Occupancy	0	13	13	4	0	4
Vacant	8	10	18	3	0	3
Total	197	517	714	1,168	0	1,168

Table 2.10: Number of dwellings in Oxley Park and South Penrith by housing type by zoning

	Oxley Park			South Penrith		
	Zone 2B	Zone 2C	Total	Zone 2B	Zone 2C	Total
Separate House (Brick)	93	249	342	931	0	931
Separate House (Fibro)	10	84	94	90	0	90
Separate House (Weatherboard)	77	128	205	133	0	133
<i>Separate Houses</i>	<i>180</i>	<i>461</i>	<i>641</i>	<i>1,154</i>	<i>0</i>	<i>1,154</i>
Multi-Unit Dwellings	103	207	310	41	0	41
Dual Occupancy	0	26	26	8	0	8
Vacant	8	10	18	3	0	3
Total	291	704	995	1,206	0	1,206

The Projected Number of Dwellings based on a 30% take-up rate

This section presents estimates the future number of dwellings that may be built in the Oxley Park and South Penrith areas under current zoning regulations based on a conversion or take-up rate of 30%. That is, 30% of the existing separate houses and vacant blocks will be developed to the “full” residential potential (including all currently vacant blocks).

South Penrith

In South Penrith all the case study areas are zoned 2b. Here we assume that 30% of the separate house and vacant lots in South Penrith will be redeveloped by dual occupancies only (i.e. 2 dwellings per lot), amounting to 347 blocks in all. The total number of dwellings in our South Penrith case study area would increase from 1206 to 1550, a net increase of 344 dwellings or 29% (Table 2.11).

Oxley Park

Currently in Oxley Park there are 188 lots with separate houses or are vacant that are zoned 2b. For this exercise we will assume that 30% (56 blocks) will be developed as dual occupancies (i.e. 112 dwellings). In addition, 471 lots in Oxley Park with separate houses or vacant are currently zoned 2c. At a 30% take-up rate we assume that 141 blocks will be redeveloped at higher density, mainly for villas and town houses. Based on the current mix in this 2c zone of 70% multi-units (with an average of 7.4 units per block) and 30% dual occupancy (i.e. 2 dwellings on the one block) we estimate that 99 blocks will developed as multi-unit (733 dwellings) and 42 blocks as dual occupancy (84 dwellings). The total number of dwellings in Oxley Park based on a 30% take-up rate will therefore increase from 995 to 1727, a net increase of 732 dwellings or 74% (Table 2.11)³. Here, the bulk of the increase will be in the form of villas and town houses.

Redevelopment above 30%?

By way of illustration of the detailed changes in dwelling type in each area, Table 2.11a shows the numbers of existing and projected dwelling numbers for each area after 30% redevelopment rate as outlined above. In addition, the impact of a 50%

³ The total dwelling numbers in table 3 have assumed that one dwelling would need to be removed for a multi-unit or dual occupancy to proceed.

redevelopment rate – by no means unrealistic given other similarly zoned areas in Western Sydney – is also provided by way of a comparison in Table 2.11b. It is worth noting that even at 30% redevelopment, the proportion of houses in the total stock of each area fall substantially, from 64% to 27% in Oxley Park and from 96% to 52% in South Penrith. At a 50% redevelopment rate, the proportion of houses falls to just 15% in Oxley Park and to 32% in South Penrith. These figures illustrate how rapidly the balance of dwelling stock changes once redevelopment accelerates. In the process, the built form of each suburb will have changed dramatically. The social changes discussed above are, of course, amplified substantially at these higher levels of change

Table 2.11a: Estimated number of total dwellings in Oxley Park and South Penrith based on a 30% redevelopment rate

	South Penrith				Oxley Park			
	Dwellings				Dwellings			
Current dwelling type	Current	Projected	Change	% Change	Current	Projected	Change	%
Separate Houses	1,154	807	-347	-30%	641	462	-179	-28%
Dual Occupancy	8	702	+694	+8675%	26	222	+196	+754%
Multi-Unit Dwellings	41	41	0	0%	310	1,043	+733	+237%
Vacant	3	0	-3	-100%	18	0	-18	-100%
Total	1,206	1,550	+344	+29%	995	1,727	+732	+74%

Table 2.11b: Estimated number of total dwellings in Oxley Park and South Penrith based on a 50% redevelopment rate

	South Penrith				Oxley Park			
	Dwellings				Dwellings			
Current dwelling type	Current	Projected	Change	% Change	Current	Projected	Change	%
Separate Houses	1,154	577	-577	-50%	641	330	-311	-49%
Dual Occupancy	8	1,162	+1,154	+n/a	26	355	+329	+1,265%
Multi-Unit Dwellings	41	41	0	0%	310	1,530	+1,220	+394%
Vacant	3	0	-3	-100%	18	0	-18	-100%
Total	1,206	1,780	+574	+46%	995	2,215	+1,220	+123%

Social Impacts of a 30% take-up rate in Oxley Park and South Penrith

Using the dwelling numbers estimated above from a 30% redevelopment scenario, this section analyses the social and economic changes that would occur if the new dwellings were occupied by similar people to those who currently live in these kinds of dwellings. That is, based on the current characteristics of individuals who live in South Penrith and Oxley Park, what will the ‘new’ social profile look like if these areas are redeveloped at a 30% take-up rate. For this exercise we have used the current profile of households who live in separate house and multi-unit dwellings⁴ from the 2001 Census and projected these forward using the new dwelling numbers above (see Tables 2.12 and 2.13). As noted above, a limited range of census based indicators is used to provide an outline of the impacts on the community.

⁴ In this instance, we have used the current profile of flats and semi-detached dwellings from the Census to mean the same as multi-unit dwellings and dual occupancies from our survey. We refer to these categories collectively as multi-unit dwellings. Separate houses from the Census represent separate houses from our survey.

South Penrith

Age: There will be a move away from persons aged 35-64, despite a small absolute increase, and a shift towards those aged 25-34 and 65 years and over. The number of persons aged 15-24 will increase, although proportionally it will remain about the same. Overall, the number of persons aged 35-64 will increase by 62, but the number of persons aged 25-34 and 65 years and over will increase by 117 and 107 respectively. People aged below 35 will increase by over a half (56%) and those over 65 by 66%..

Tenure: The increase in multi-unit dwellings means the number of home owners and buyers falls (by 70 households), while the numbers of renters more than doubles, particularly private renters (by 244 households). These changes have a significant impact on the overall tenure profile of the area, with private renters increasing from 14% of the total to 27%.

Income: The increase in multi-unit housing means a shift to households with lower incomes. The predictions show a doubling of the numbers of households with incomes under \$400 (194 households or 124%) with a 15% loss of households earning over \$2,000 per week.

Household Type: Perhaps one of the largest changes based on a 30% redevelopment rate in South Penrith will be a shift towards lone person and single parent family households. Lone person households are expected to more than double in number by 222 (from 15% to 26%), while single parent households will increase by 105 (from 14% to 18%). Conversely, there will be a significant shift away from couple families with children (-16%) and couples without children (-3%).

Car ownership: Under the assumptions built in to this scenario, it is anticipated that the number of motor vehicles will increase in South Penrith by 537, or 29%.

Oxley Park

Age: As in South Penrith, the increase in multi-unit housing in Oxley Park will lead to a younger age profile in the local community. In this case, the number of people aged under 35 more than doubles, and the percentage share increases from 27% to 34%. The proportion aged between 35 and 44 also increases, but at a much lower rate. In comparison, the proportion of people aged over 45 years falls, although the numbers increase absolutely.

Tenure: While there are small increases in the numbers of home owners and buyers, they are much less than the increase in renters. Overall, there will an increase of 474 households who are renting privately, a shift from 29% to 44% of the total. Proportionally, home owners and buyers decline by 12 percentage points and 7 percentage points respectively.

Income: Oxley Park has a lower income profile than South Penrith, partly a reflection of the fact that its age profile has higher proportions of both older and younger people. As a result, the shift to multi-unit housing results in less severe impact on incomes here. In fact, the switch to higher density will increase the proportions of those in the range \$500 to \$700 per week. Nevertheless, the numbers

of lower income households earning under \$400 per week increase at a faster rate than those at the top end (over \$1000 per week). Once again, there is a proportional shift away from higher income earners.

Household Type: Similarly to South Penrith, there will be a shift away from couple families towards lone person and single parent families. While couples with children and couples without children are expected to increase (by 116 and 108 respectively), the increase in lone person households and single parent families is expected to be much larger (190 and 252 respectively), doubling the numbers of these two groups in the area. Proportionally, this represents a 7 percentage point decrease in couples with children and a 2 percentage point decrease in couples without children, while lone person households and single parent families are expected to increase by 3 percentage points and 6 percentage points respectively.

Car ownership: The number of motor vehicles is anticipated to increase by 996 under this scenario, a 74% increase on current numbers, 1,353 to 2,349.

Comment

Using current planning regulations and assumptions, the redevelopment of South Penrith can be expected to be limited to dual occupancies. But in Oxley Park, the higher density zoning of much of the area means that medium density housing will be the predominant new housing type, in the form of villas and town houses. The overall impact of redevelopment results in a 29% increase in dwelling numbers in the six collector districts used for the case study in South Penrith, assuming that dual occupancy results in a doubling of dwelling numbers on those sites redeveloped. The proportion of separate houses falls from almost 100% to just over half.

The much higher density permitted in Oxley Park results a more substantial 74% increase in overall dwelling numbers (we have assumed a replacement ratio of just over seven new dwellings for one existing one in this suburb). Here, the proportion of separate houses falls from two thirds to just over a quarter, making this dwelling type by far the minority housing type in the area. The redevelopment process therefore results in a major shift in the balance of the built form from low density separate houses to medium and higher density housing in both areas, even at the 30% redevelopment rate allowed for in the current Penrith Residential Strategy.

In both cases, this higher density redevelopment results in a marked shift to private renting. As a result, there will be an increase in single person and lone parent households, a relative decline in couples with children, an increase in those on moderate to low incomes (especially in South Penrith), and households headed by someone aged under 35 years old. In South Penrith, the increase in dual occupancies also means a higher proportion of older people over 65. In Oxley Park, there is an increase in moderate income households associated with villa and town house development, although once again, the increase in those on lower incomes is greater than those on higher incomes.

Car numbers will increase in proportion with numbers of dwellings. Assuming there is no change in the propensity of people in the new higher density housing to own and use cars compared to those already living in these areas (and given their location in

relation to available public transport, there is no reason to think these propensities will change), then car usage will increase substantially in both areas. The impact will be most significant in Oxley Park, with a three quarter increase in car numbers.

However, this scenario has only assumed a 30% redevelopment rate, and a steady state among the remaining houses. Several points can be made here. In other parts of Western Sydney where zoning for higher density has been permitted over a number of decades, much higher redevelopment rates have been experienced. Indeed, these are approaching 100% in some areas. Once zoned, there is no obvious 'natural' limit to redevelopment until 100% of lots has been worked over. It is much more likely that once redevelopment reaches a critical threshold or tipping point when higher density is perceived to have become the dominant built form in the neighbourhood, a much more rapid escalation of redevelopment might be expected. As we have shown, the proportion of separate houses falls to half in Penrith South and to only a quarter in Oxley Park with just a 30% redevelopment rate, so this threshold might not be that high. The remaining house owners may then be more likely to sell out to developers before the process proceeds too much further or as houses become harder to sell, and therefore relatively devalued, again prompting their more likely sale for redevelopment. The fact that there already appears to be a process of 'block busting' going on in Canberra Street suggests this is a process that could happen.

It follows that the social impacts of a more extensive redevelopment process will be much more pronounced than those reported here. For example, at 50% redevelopment, car numbers would escalate to over 3,000 in Oxley Park, assuming current car ownership rate remain static. A higher income community would certainly increase this number.

Table 2.12: A socio-economic profile of households in South Penrith and Oxley Park based on the redevelopment of the areas with a 30% take of multi-unit dwellings

South Penrith	Current Number			Estimated Number Based on a 30% redevelopment rate			Change			
	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	% Change
AGE OF REFERENCE PERSON										
15-24	44	3	47	31	43	74	-13	40	27	57.4
25-34	199	13	212	139	190	329	-60	177	117	55.2
35-44	231	9	239	161	130	291	-70	121	52	21.8
45-54	310	7	317	216	107	323	-94	100	6	1.9
55-64	202	5	207	141	70	211	-61	65	4	1.9
65 and over	153	11	163	106	163	270	-47	152	107	65.6
Inadequately Described	18	3	21	13	40	53	-5	37	32	152.4
Total	1,157	49	1,206	807	743	1,550	-350	694	344	28.5
TENURE TYPE										
Fully Owned	509	9	518	355	137	492	-154	128	-26	-5.0
Being Purchased	422	6	428	294	90	384	-128	84	-44	-10.3
Rented - State/Territory Housing Authority	31	7	38	22	110	132	-9	103	94	247.4
Rented - Other landlord	149	20	170	104	310	414	-45	290	244	143.5
Rented - Landlord Not stated	3	1	4	2	10	12	-1	9	8	200.0
Other tenure type	14	2	15	9	23	33	-5	21	18	120.0
Tenure type Not stated	29	4	33	20	63	84	-9	59	51	154.5
Total	1,157	49	1,206	807	743	1,550	-350	694	344	28.5

Urban Growth Management in Penrith Stage 2 Report

	Current Number			Estimated Number Based on a 30% take-up rate			Change			
	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	% Change
HOUSEHOLD INCOME										
Less than \$200	33	4	36	23	57	79	-10	53	43	119.4
\$200-\$299	44	8	52	31	123	154	-13	115	102	196.2
\$300-\$399	63	5	68	44	73	117	-19	68	49	72.1
\$400-\$499	71	3	74	50	40	90	-21	37	16	21.6
\$500-\$599	52	2	54	36	37	73	-16	35	19	35.2
\$600-\$699	56	3	59	39	47	86	-17	44	27	45.8
\$700-\$799	53	3	56	37	43	80	-16	40	24	42.9
\$800-\$999	112	3	115	78	47	125	-34	44	10	8.7
\$1,000-\$1,199	108	3	111	75	43	119	-33	40	8	7.2
\$1,200-\$1,499	133	4	136	92	53	146	-41	49	10	7.4
\$1,500-\$1,999	165	5	170	115	70	185	-50	65	15	8.8
\$2,000 or more	122	1	123	85	20	105	-37	19	-18	-14.6
Partial or all incomes not stated	145	6	151	101	90	191	-44	84	40	26.5
Total	1,157	49	1,206	807	743	1,550	-350	694	344	28.5
HOUSEHOLD TYPE										
Couple family with children	512	5	517	357	77	434	-155	72	-83	-16.1
Couple without children	275	5	280	192	80	272	-83	75	-8	-2.9
Single Parent family	156	11	167	109	163	272	-47	152	105	62.9
Other family	11	1	13	8	17	25	-3	16	12	92.3
Lone Person Household	163	19	182	114	290	404	-49	271	222	122.0
Group Household	22	3	25	15	50	65	-7	47	40	160.0
Visitor only household	4	1	5	3	10	13	-1	9	8	160.0
Other not classifiable household	14	4	18	10	57	66	-4	53	48	266.7
Total	1,157	49	1,206	807	743	1,550	-350	694	344	28.5
NUMBER OF MOTOR VEHICLES			1,881			2,418			537	28.5

Urban Growth Management in Penrith Stage 2 Report

Oxley Park	Current Number			Estimated Number Based on a 30% take-up rate			Change			
	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	% Change
AGE OF REFERENCE PERSON										
15-24	33	41	74	23	153	176	-10	112	102	137.8
25-34	107	88	195	75	330	405	-32	242	210	107.7
35-44	119	75	195	84	284	367	-35	209	172	88.2
45-54	140	45	185	98	169	267	-42	124	82	44.3
55-64	117	35	151	82	130	212	-35	95	61	40.4
65 and over	129	45	174	90	169	259	-39	124	85	48.9
Inadequately Described	14	8	22	10	31	41	-4	23	19	86.4
Total	659	336	995	462	1,265	1,727	-197	929	732	73.6
TENURE TYPE										
Fully Owned	309	59	368	217	222	439	-92	163	71	19.3
Being Purchased	192	39	230	134	146	280	-58	107	50	21.7
Rented - State/Territory Housing Authority	8	41	49	6	153	159	-2	112	110	224.5
Rented - Other landlord	106	183	290	74	690	764	-32	507	474	163.4
Rented - Landlord Not stated	4	0	4	3	0	3	-1	0	-1	-25.0
Other tenure type	8	0	8	5	0	5	-3	0	-3	-37.5
Tenure type Not stated	32	14	46	22	54	76	-10	40	30	65.2
Total	659	336	995	462	1,265	1,727	-197	929	732	73.6

Urban Growth Management in Penrith Stage 2 Report

	Current Number			Estimated Number Based on a 30% take-up rate			Change			
	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	Separate Houses	Multi-Unit Dwellings	Total	% Change
HOUSEHOLD INCOME										
Less than \$200	25	12	38	18	46	64	-7	34	26	68.4
\$200-\$299	45	26	72	32	100	131	-13	74	59	81.9
\$300-\$399	60	35	95	42	130	173	-18	95	78	82.1
\$400-\$499	45	24	70	32	92	124	-13	68	54	77.1
\$500-\$599	33	33	65	23	123	146	-10	90	81	124.6
\$600-\$699	44	31	75	31	115	146	-13	84	71	94.7
\$700-\$799	27	12	39	19	46	65	-8	34	26	66.7
\$800-\$999	69	45	113	48	169	217	-21	124	104	92.0
\$1,000-\$1,199	57	24	82	40	92	132	-17	68	50	61.0
\$1,200-\$1,499	58	16	75	41	61	102	-17	45	27	36.0
\$1,500-\$1,999	60	20	81	42	77	119	-18	57	38	46.9
\$2,000 or more	38	6	44	26	23	49	-12	17	5	11.4
Partial or all incomes not stated	97	51	148	68	192	260	-29	141	112	75.7
Total	659	336	995	462	1,265	1,727	-197	929	732	73.6
HOUSEHOLD TYPE										
Couple family with children	252	69	321	177	261	437	-75	192	116	36.1
Couple without children	147	55	202	103	207	310	-44	152	108	53.5
Single Parent family	99	102	201	69	383	453	-30	281	252	125.4
Other family	11	8	19	8	31	39	-3	23	20	105.3
Lone Person Household	118	81	199	82	307	389	-36	226	190	95.5
Group Household	19	6	25	13	23	36	-6	17	11	44.0
Visitor only household	3	0	3	2	0	2	-1	0	-1	-33.3
Other not classifiable household	11	14	26	8	54	62	-3	40	36	138.5
Total	659	336	995	462	1,265	1,727	-197	929	732	73.6
NUMBER OF MOTOR VEHICLES			1,353			2,349			996	73.6

Table 2.13: A socio-economic profile of households in South Penrith and Oxley Park based on the redevelopment of the areas with a 30% take of multi-unit dwellings (%)

	South Penrith			Oxley Park		
	Current Proportion	Estimated Proportion Based on 30% take-up rate	Percentage Point Change	Current Proportion	Estimated Proportion Based on 30% take-up rate	Percentage Point Change
AGE OF REFERENCE PERSON						
15-24	3.9%	4.8%	0.9%	7.4%	10.2%	2.8%
25-34	17.6%	21.2%	3.6%	19.6%	23.5%	3.9%
35-44	19.8%	18.8%	-1.0%	19.6%	21.3%	1.7%
45-54	26.3%	20.8%	-5.4%	18.6%	15.5%	-3.1%
55-64	17.2%	13.6%	-3.6%	15.2%	12.3%	-2.9%
65 and over	13.5%	17.4%	3.9%	17.5%	15.0%	-2.5%
Inadequately Described	1.7%	3.4%	1.7%	2.2%	2.4%	0.2%
Total	100.0%	100.0%		100.0%	100.0%	
TENURE TYPE						
Fully Owned	43.0%	31.7%	-11.2%	37.0%	25.4%	-11.6%
Being Purchased	35.5%	24.8%	-10.7%	23.1%	16.2%	-6.9%
Rented - State/Territory Housing Authority	3.2%	8.5%	5.4%	4.9%	9.2%	4.3%
Rented - Other landlord	14.1%	26.7%	12.6%	29.1%	44.2%	15.1%
Rented - Landlord Not stated	0.3%	0.8%	0.4%	0.4%	0.2%	-0.2%
Other tenure type	1.2%	2.1%	0.9%	0.8%	0.3%	-0.5%
Tenure type Not stated	2.7%	5.4%	2.7%	4.6%	4.4%	-0.2%
Total	100.0%	100.0%		100.0%	100.0%	

Urban Growth Management in Penrith Stage 2 Report

	South Penrith			Oxley Park		
	Current Proportion	Estimated Proportion Based on 30% take-up rate	Percentage Point Change	Current Proportion	Estimated Proportion Based on 30% take-up rate	Percentage Point Change
HOUSEHOLD INCOME						
Less than \$200	3.0%	5.1%	2.1%	3.8%	3.7%	-0.1%
\$200-\$299	4.3%	9.9%	5.6%	7.2%	7.6%	0.3%
\$300-\$399	5.6%	7.5%	1.9%	9.5%	10.0%	0.5%
\$400-\$499	6.1%	5.8%	-0.3%	7.0%	7.2%	0.1%
\$500-\$599	4.5%	4.7%	0.2%	6.5%	8.5%	1.9%
\$600-\$699	4.9%	5.5%	0.7%	7.5%	8.5%	0.9%
\$700-\$799	4.6%	5.2%	0.5%	3.9%	3.8%	-0.2%
\$800-\$999	9.5%	8.1%	-1.5%	11.4%	12.6%	1.2%
\$1,000-\$1,199	9.2%	7.7%	-1.5%	8.2%	7.6%	-0.6%
\$1,200-\$1,499	11.3%	9.4%	-1.9%	7.5%	5.9%	-1.6%
\$1,500-\$1,999	14.1%	11.9%	-2.2%	8.1%	6.9%	-1.3%
\$2,000 or more	10.2%	6.8%	-3.4%	4.4%	2.8%	-1.6%
Partial or all incomes not stated	12.5%	12.3%	-0.2%	14.9%	15.1%	0.2%
Total	100.0%	100.0%		100.0%	100.0%	
HOUSEHOLD TYPE						
Couple family with children	42.9%	28.0%	-14.9%	32.3%	25.3%	-7.0%
Couple without children	23.2%	17.5%	-5.7%	20.3%	18.0%	-2.4%
Single Parent family	13.8%	17.5%	3.7%	20.2%	26.2%	6.0%
Other family	1.1%	1.6%	0.5%	1.9%	2.3%	0.3%
Lone Person Household	15.1%	26.1%	11.0%	20.0%	22.5%	2.5%
Group Household	2.1%	4.2%	2.1%	2.5%	2.1%	-0.4%
Visitor only household	0.4%	0.8%	0.4%	0.3%	0.1%	-0.2%
Other not classifiable household	1.5%	4.3%	2.8%	2.6%	3.6%	1.0%
Total	100.0%	100.0%		100.0%	100.0%	
NUMBER OF MOTOR VEHICLES			28.5%			73.6%

2.4 VISUALISATION OF URBAN RENEWAL

In addition to modelling the social outcomes of redevelopment of the two case study areas, a set of physical models have been generated which use Computer Aided Design software to model a 3-D image of each suburb. The aim of this urban visualisation exercise was to graphically demonstrate the impact of growth patterns over the areas of South Penrith and Oxley Park.

Three-dimensional digital models of the existing focus areas were developed by manually tracing building footprints from aerial photos onto the cadastre and extruding these to form volumes. These volumes could then be used to generate roof shapes indicative of the existing urban form. This method served to generate building volumes rapidly over a large geographic expanse - at the expense of a high level of accuracy and detail, yet clearly establishing the existing visual character of the areas. The building footprints were also imported into the GIS to augment the cadastral information gathered in the drive-by surveys and provide a base for calculating site coverage and average building footprints.

Examples of this modelling exercise are shown in Figures 2.10 to 2.19. Figures 2.18 and 19 show examples of the synthetic dwelling forms without the background cadastral or areal photographic material. This illustrates how built form representations can be varied with a high degree of realism. These are then fitted to the cadastre and areal photographs to provide a 3-D simulation of the area.

The impact of redevelopment

The CAD based model was recalibrated using a 30% redevelopment scenario for both case study suburbs under the same assumptions as set out above. Of these developed lots, up to half conformed to the existing patterns consolidating two lots into a single townhouse style development. The building envelopes represented the maximum envelopes permitted under current council guidelines: a 6m setback from the front boundary, 8m from the rear boundary and an envelope sloping up 45° from a 1.8m fence height, encompassing a building with a minimum 2.4m floor to ceiling height. Each lot could hold three townhouses with a footprint of 94 m², and a total floor area over two stories of 150 m².


The results of this exercise are shown in Figures 2.20 to 2.26. Here, the redevelopment of blocks has been allocated in a random manner. Block in South Penrith, at between 633m² to 690m², are almost half the size of the average in Oxley Park, at 1,100m². For the former we have simply assumed a doubling of dwelling numbers of redeveloped sites. For the latter, we have assumed an average of 7.4 new dwellings per redeveloped block, reflecting a mix of villa/townhouse dwellings in the 2c zone and dual occupancies in the 2b zone based on current permitted densities.


The change in site coverage resulting from higher densities is also shown in the accompanying statistics, with the average building footprint per block in Oxley Park increasing from 14% to 69% for developed sites, and those in South Penrith increasing from between 18% and 25% up to 76% per block. Not unexpectedly, the individual building footprints on the developed plots fall – from 153 m² to 100m² in Oxley Park and from between 117m² and 172m² to 94m² in South Penrith.


The impact on the streetscape can be appreciated from the visual simulations, especially in the case of Oxley Park where higher densities result in a more dominant impact of new development. Dual occupancy redevelopment has a potentially less prominent impact on the streetscape. In both cases, however, two storey development would be typical, adding more mass to the built form with potential impacts on neighbours. While the computer generated visualisations lack refinement – for example it would be possible to add details to the dwelling forms (such as doors and windows and vary the individual design of the buildings) and include garden details and trees that would soften the image – the overall impression approaches some of the streetscapes that can be found in other parts of western Sydney. If we had modelled the impact of a higher redevelopment rate – say 50% or even higher – there would have been a much greater visual (and indeed social) impact.

It might also be assumed that, in reality, clustering of the kind described in Oxley Park in section 2.2 above may well take place. Further modelling could show how a clustered redevelopment process might look in physical terms. In addition, additional development of the model to make the synthetic built forms more realistic could be undertaken if required to add further realism to the model.

A summary of the case study areas follows:

	Oxley Park: Undeveloped	
	Lots:	659
	Average lot area:	1100 m ²
	Average building footprint:	153 m ²
	Average site coverage:	14%
	Oxley Park: Developed	
	Lots developed	197
	New dwellings	620 (100m2 footprint/unit)
	Average site coverage	69% (on developed sites)

	South Penrith Area 1 : Undeveloped	
	Lots:	341
	Average lot area:	642 m ²
	Average building footprint:	117 m ²
	Average site coverage:	18%
	South Penrith Area 1 : Developed	
	Lots developed	100 (27 consolidated)
	New dwellings	219 (94m2 footprint/unit)
	Average site coverage	69% (on developed sites)

	South Penrith Area 2 : Undeveloped	
	Lots:	216
	Average lot area:	641 m ²
	Average building footprint:	139 m ²
	Average site coverage:	22%
	South Penrith Area 2 : Developed	
	Lots developed	65 (16 consolidated)
	New dwellings	152 (94m2 footprint/unit)
	Average site coverage	66% (on developed sites)

	<p>South Penrith Area 3 : Undeveloped</p> <p>Lots: 218</p> <p>Average lot area: 690 m²</p> <p>Average building footprint: 172 m²</p> <p>Average site coverage: 25%</p> <p>South Penrith Area 3 : Developed</p> <p>Lots developed 65 (27 consolidated)</p> <p>New dwellings 116 (94m2 footprint/unit)</p> <p>Average site coverage 76% (on developed sites)</p>
	<p>South Penrith Area 4 : Undeveloped</p> <p>Lots: 110</p> <p>Average lot area: 655 m²</p> <p>Average building footprint: 141 m²</p> <p>Average site coverage: 22%</p> <p>South Penrith Area 4 : Developed</p> <p>Lots developed 30 (15 consolidated)</p> <p>New dwellings 90 (94m2 footprint/unit)</p> <p>Average site coverage 60% (on developed sites)</p>
	<p>South Penrith Area 5 : Undeveloped</p> <p>Lots: 252</p> <p>Average lot area: 633 m²</p> <p>Average building footprint: 156 m²</p> <p>Average site coverage: 25%</p> <p>South Penrith Area 5 : Developed</p> <p>Lots developed 75 (19 consolidated)</p> <p>New dwellings 162 (94m2 footprint/unit)</p> <p>Average site coverage 69% (on developed sites)</p>

Figure 2.10: Superimposition of building forms over an aerial photograph of South Penrith outlining the five case study CDs

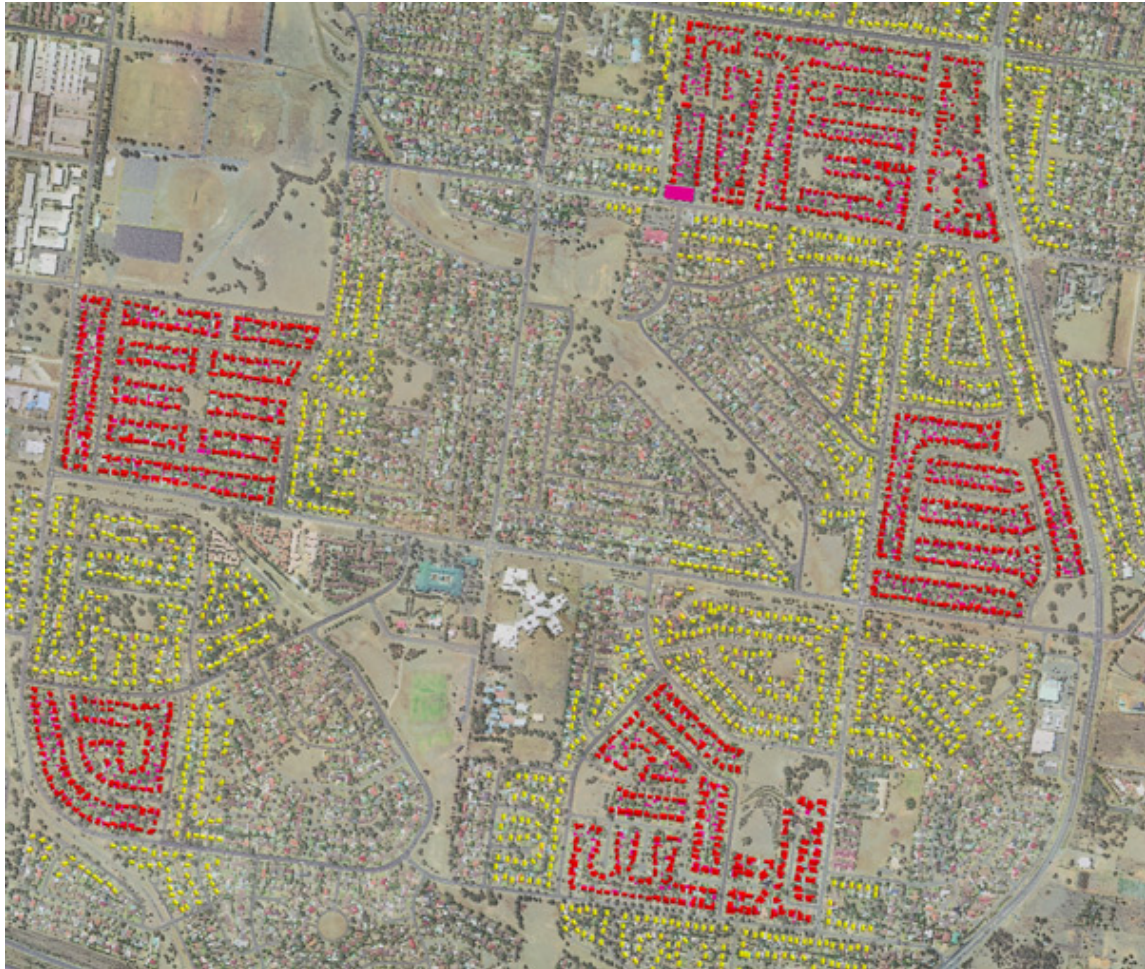


Figure 2.11: Overview of individuals CD diagrams for South Penrith

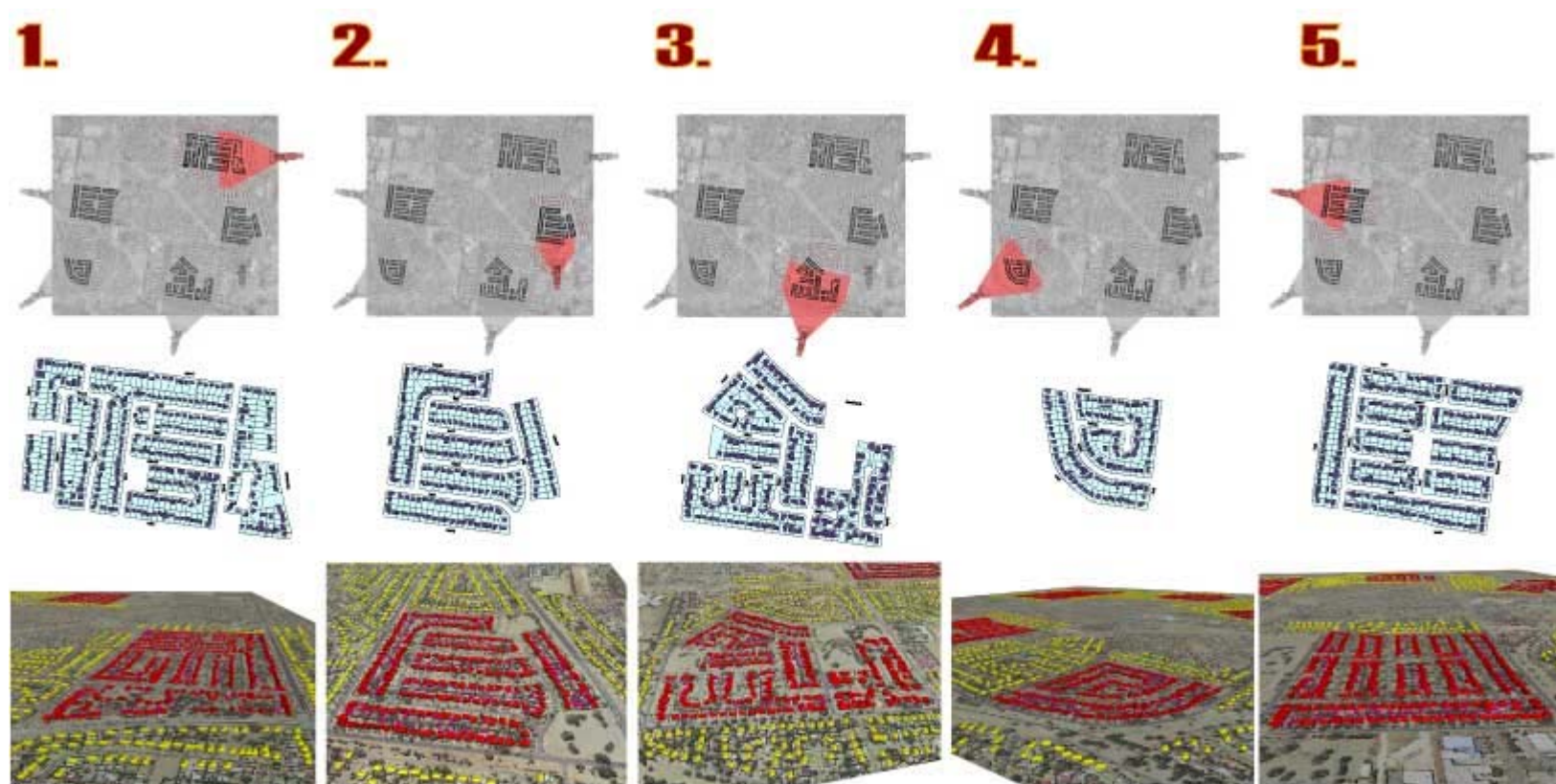


Figure 2.12: South Penrith CD 1



Figure 2.13: South Penrith CD 2



Figure 2.14: South Penrith CD 3



Figure 2.15: South Penrith CD 4

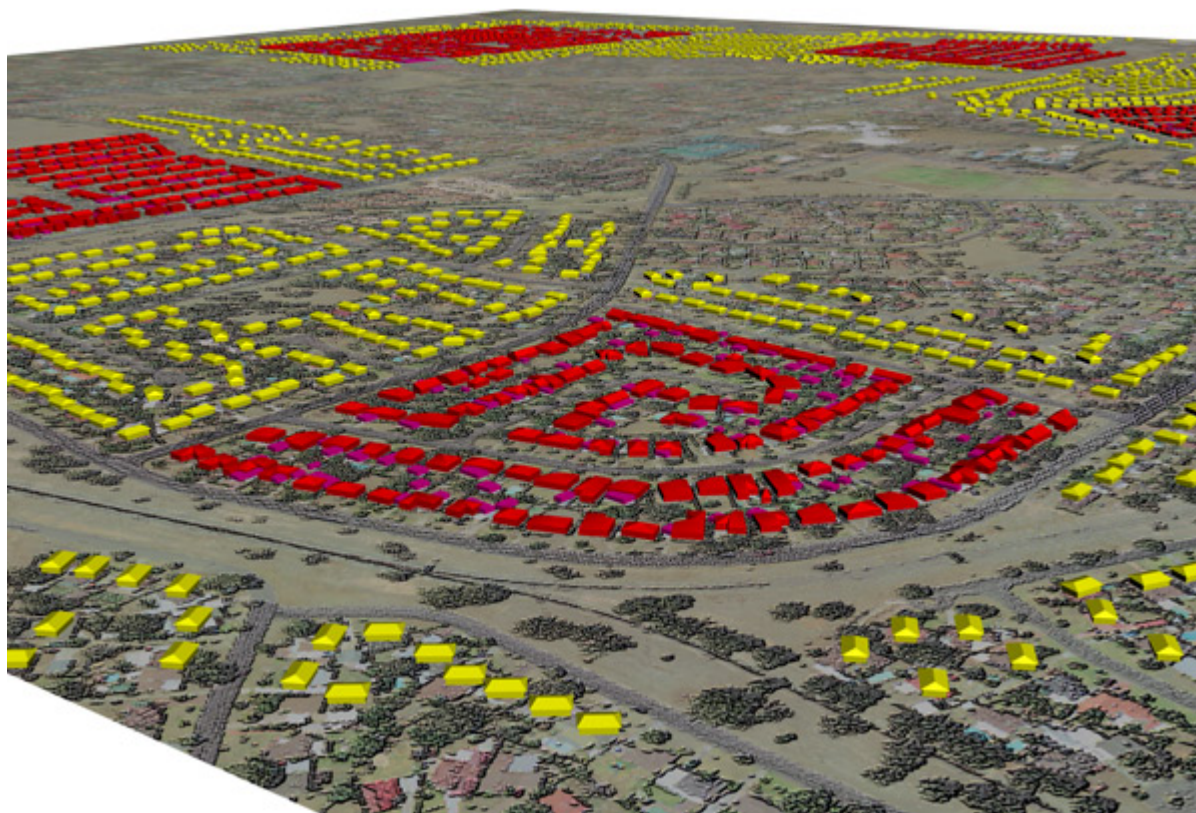


Figure 2.16: South Penrith CD 5



Figure 2.17: Superimposition of building forms over an areal photograph of the Oxley Park case study area from the east

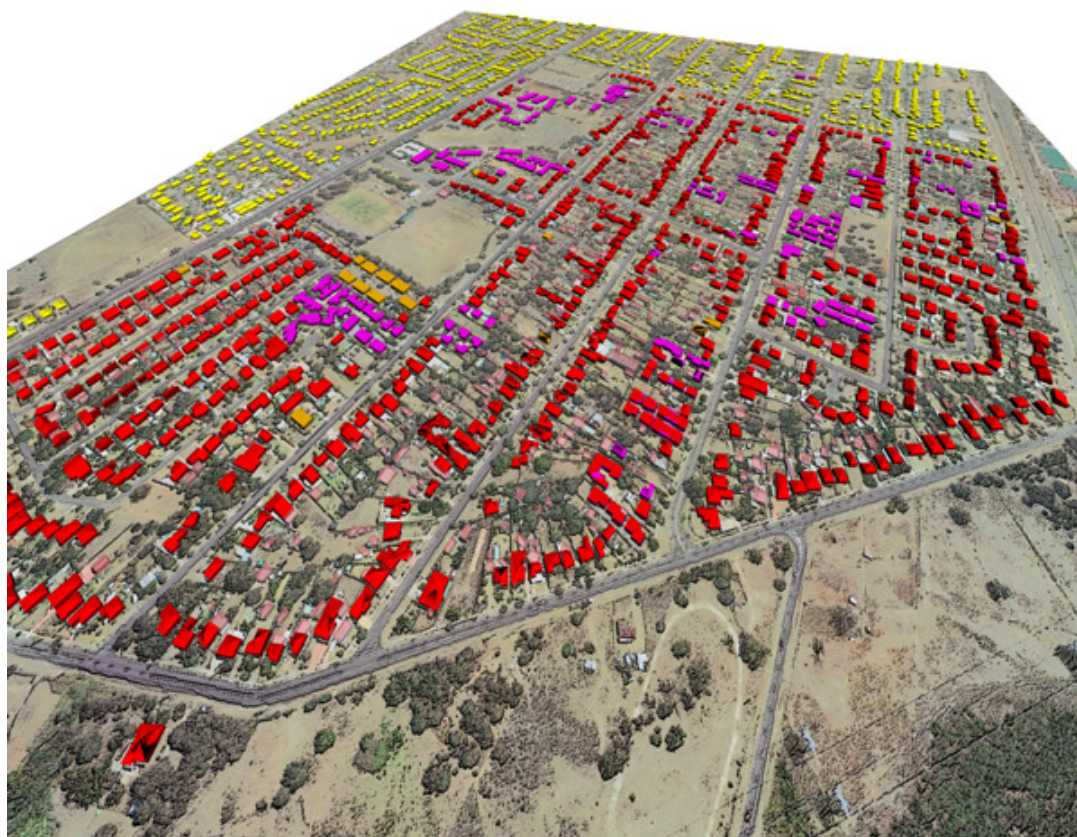


Figure 2.18: Oxley Park: Built form modelling viewed at the Canberra and Perth Street intersection from the south (current situation)

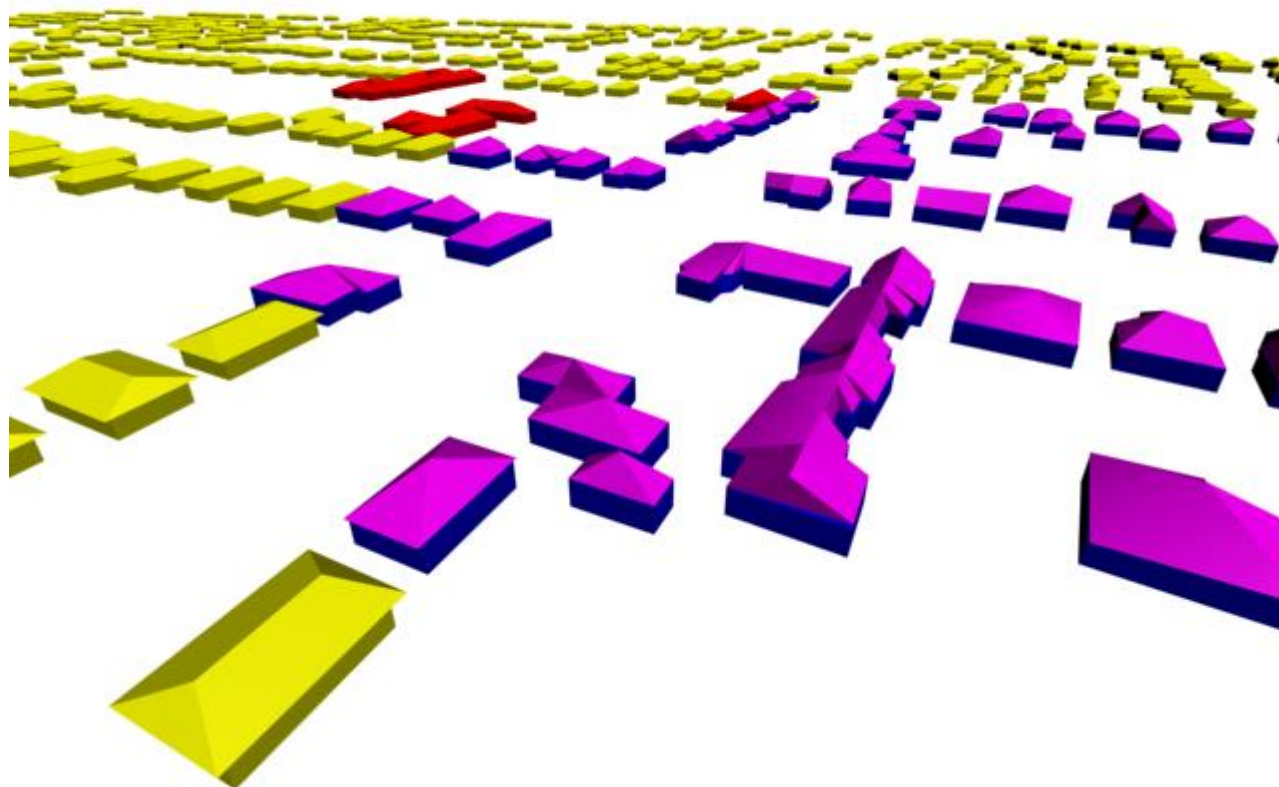


Figure 2.19: Oxley Park: Built form modelling viewed along Canberra Street from Melbourne Street (current situation)

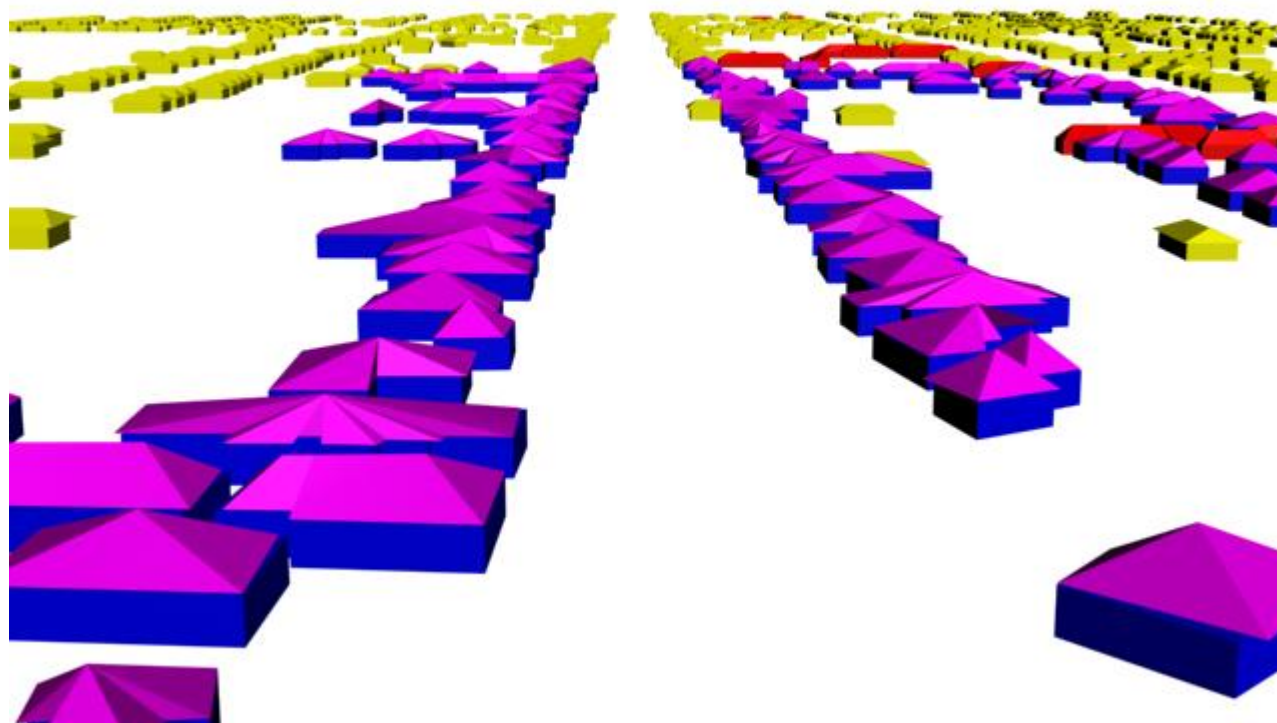


Figure 2.20: South Penrith: Case study CD area 5 undeveloped



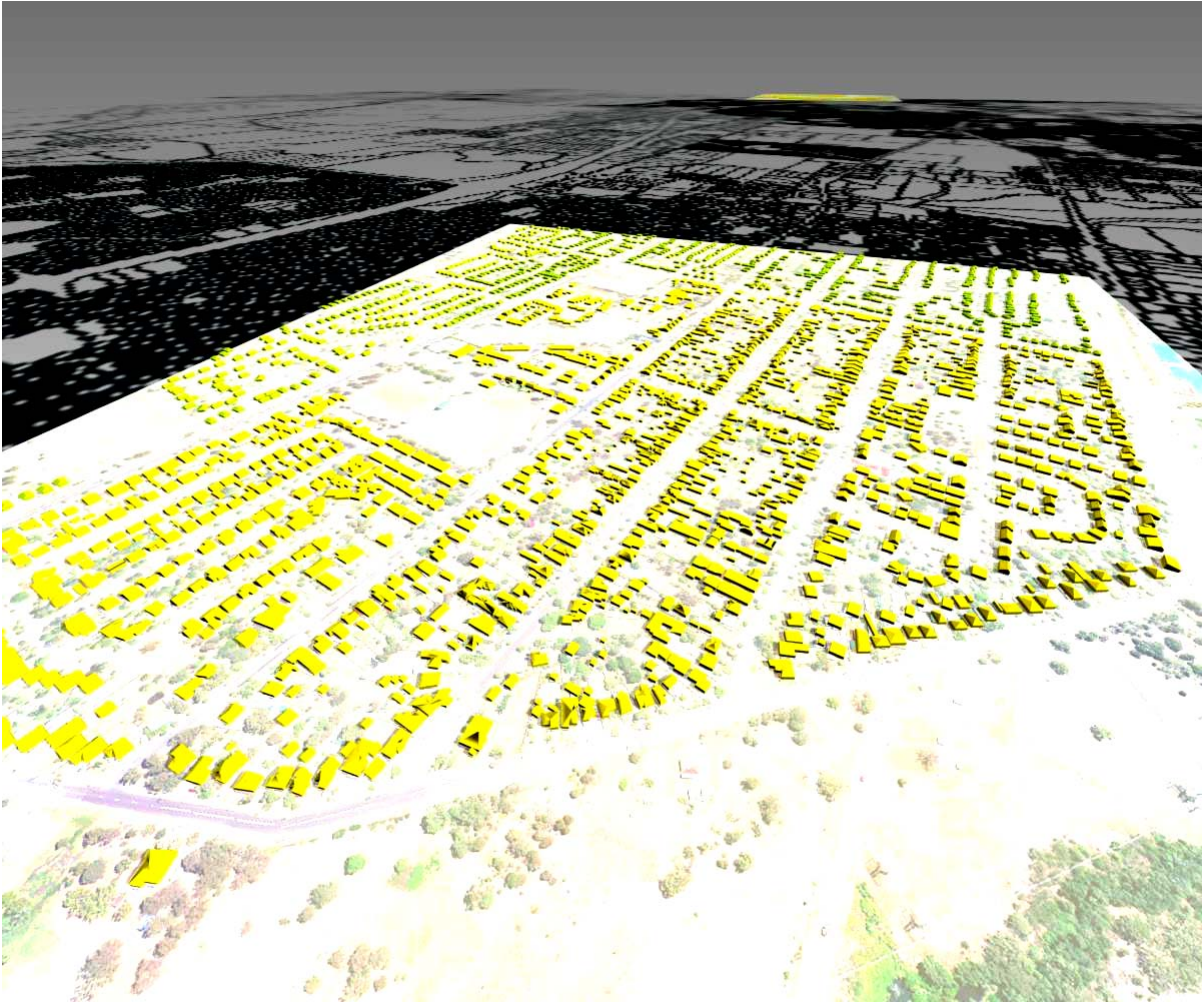
Undeveloped	
Lots	252
Average lot area	633 m2
Average building footprint	156 m2
Average site coverage	25%

Figure 2.20: South Penrith: Case study CD area 5 redeveloped to 30% capacity



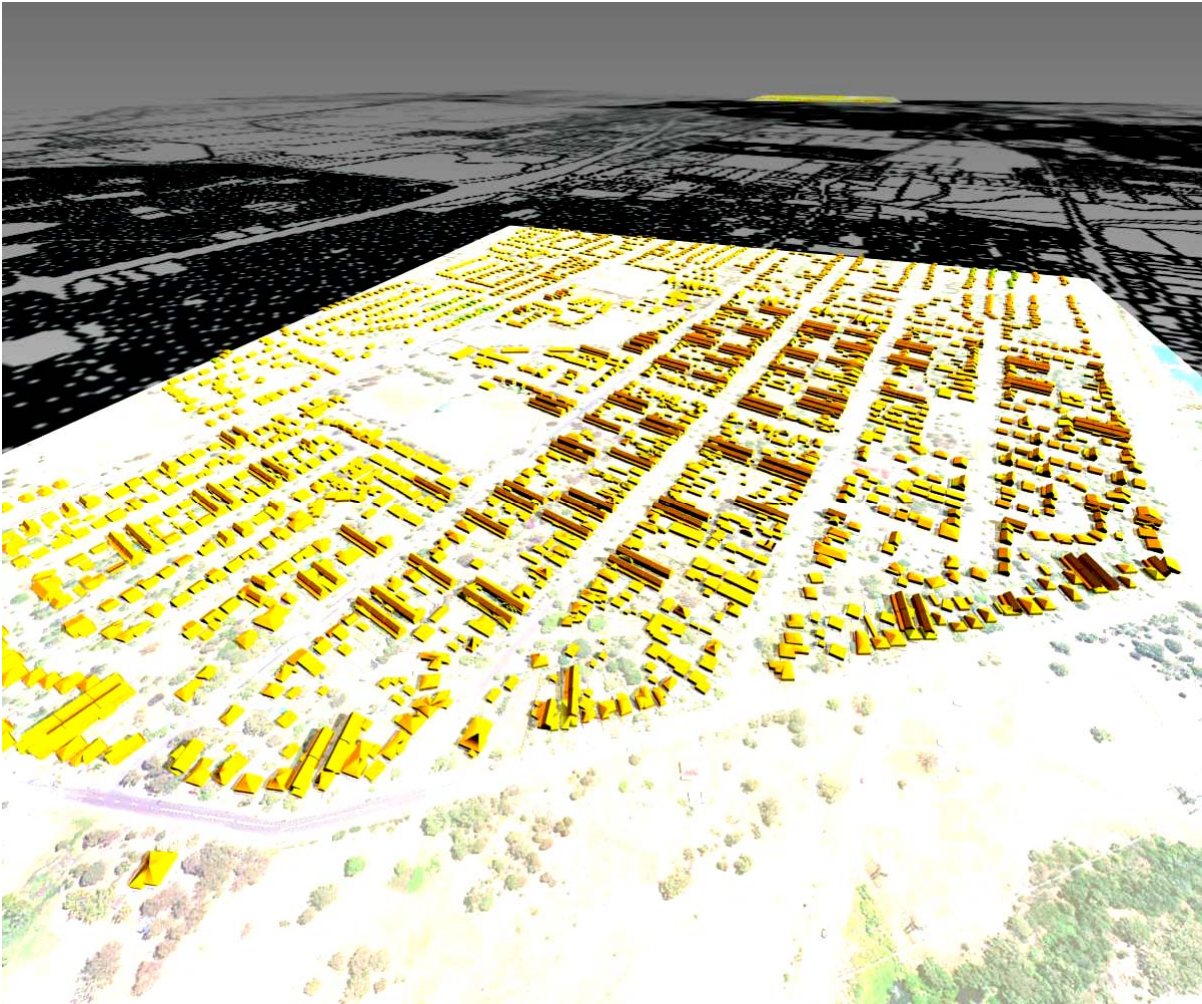
	Redeveloped
Lots developed	75
New dwellings	162
Average dwelling footprint	94m2
Average site coverage	31% on developed sites

Figure 2.21: Oxley Park: Case study area undeveloped



Undeveloped	
Lots	584
Average lot area	1100 m2
Average building footprint	153 m2
Average site coverage	14%

Figure 2.22: Oxley Park: Case study area redeveloped at 30% capacity



	Redeveloped
	181:
Lots developed	100 as multi-unit 81 as dual occs
New dwellings	620
Average dwelling footprint	100m2
Average site coverage	31% on developed sites

Figure 2.23: Impact of town house development on building footprint, Oxley Park.

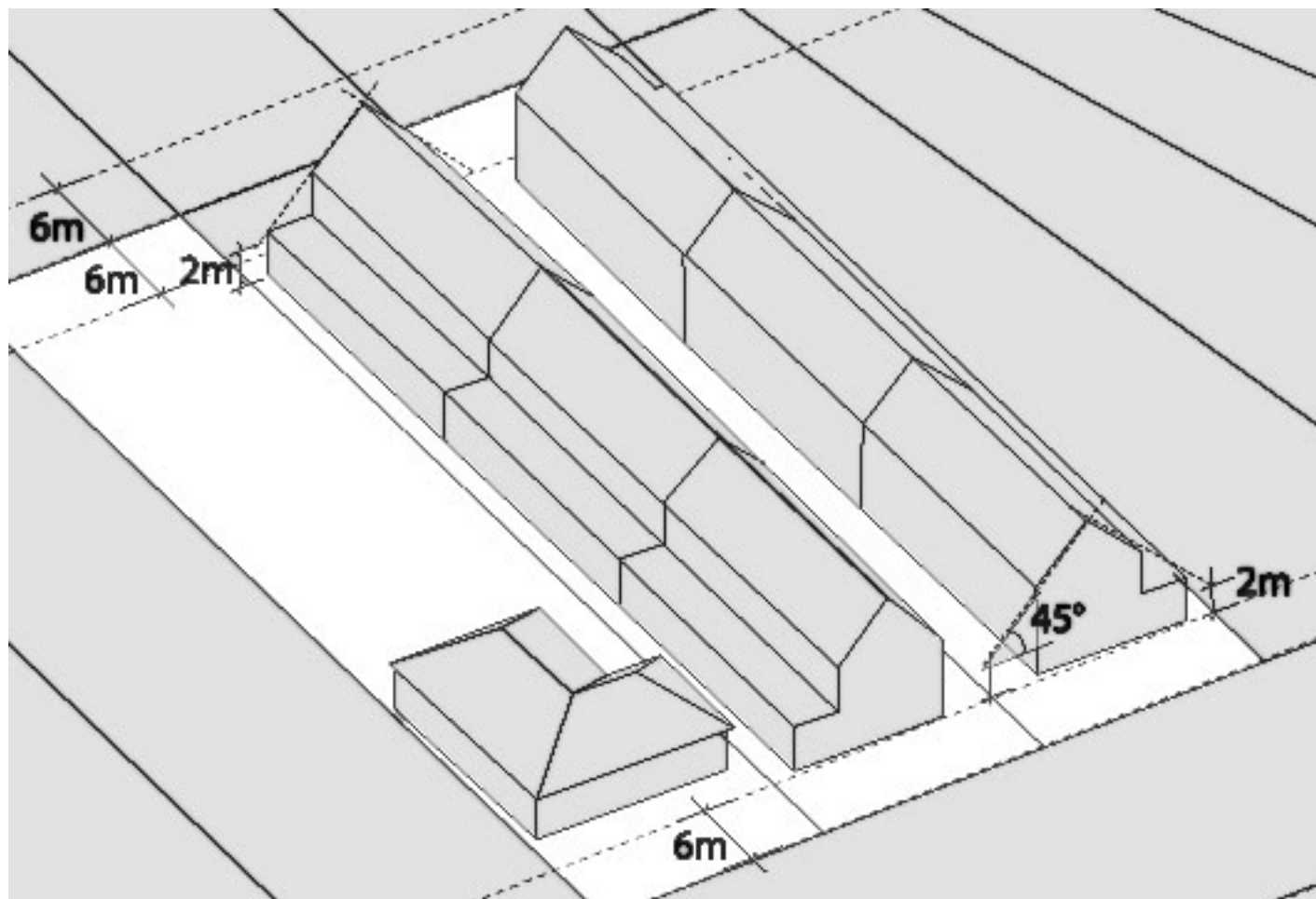


Figure 2.24: Tree top view of Oxley Park undeveloped – View 1

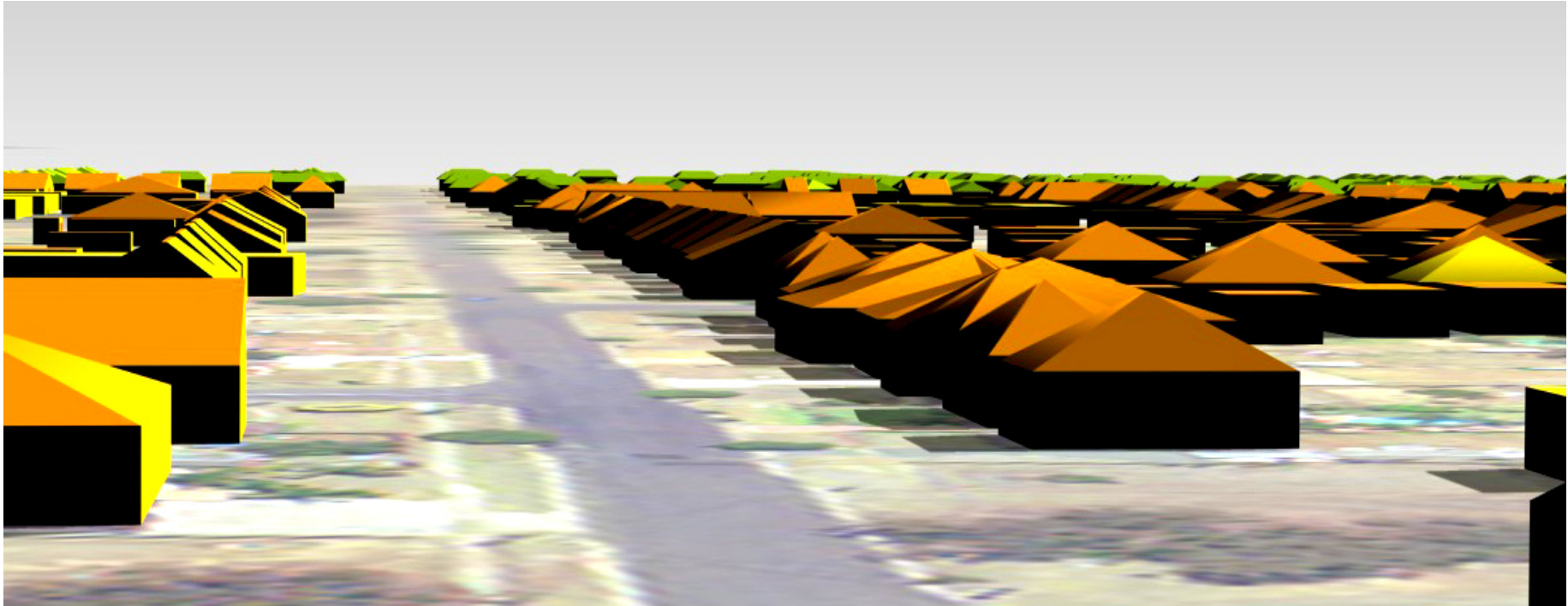


Figure 2.25: Tree top view of Oxley Park redeveloped at 30% capacity – View 1

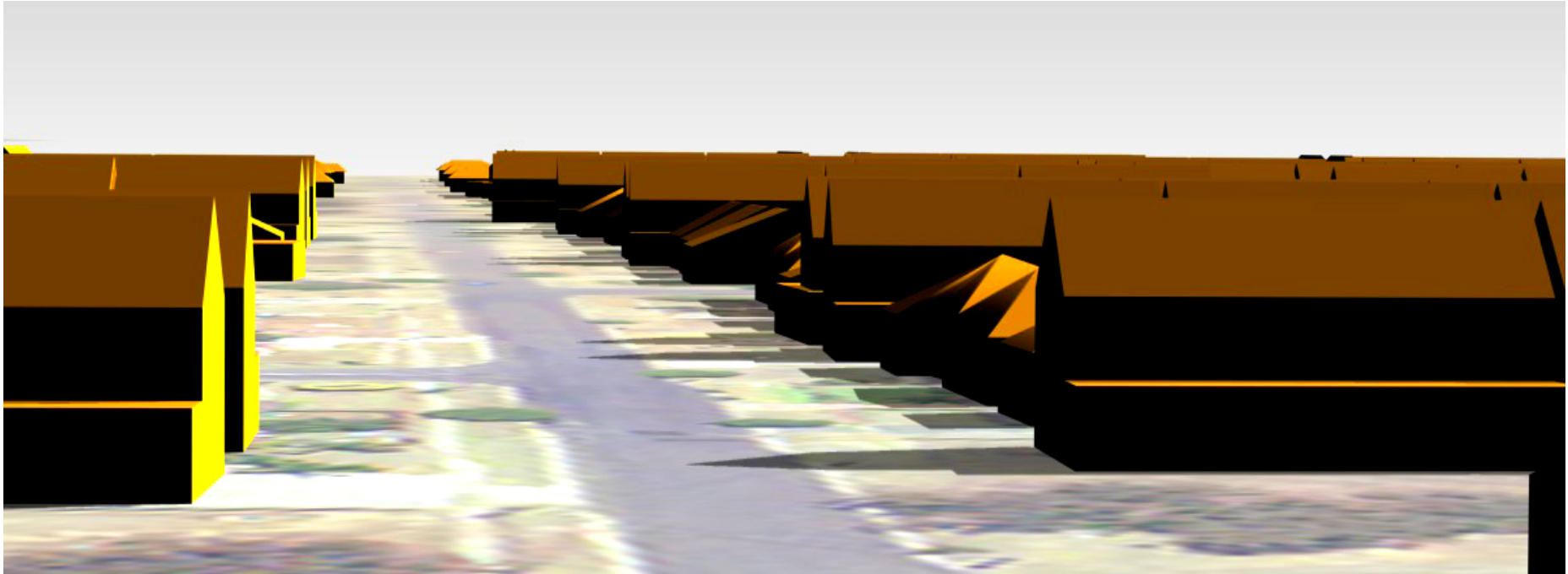


Figure 2.26: Tree top view of Oxley Park undeveloped – View 2

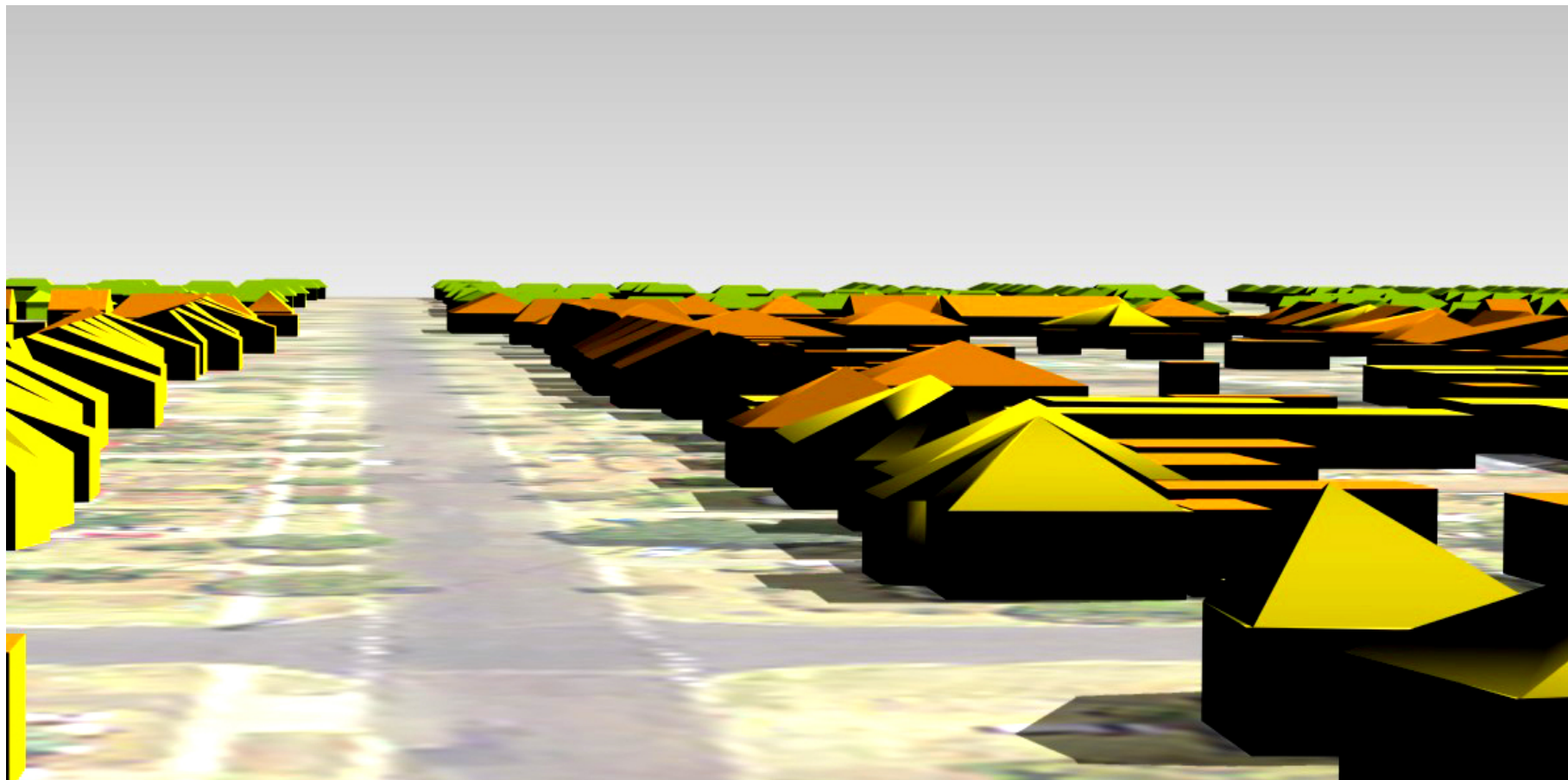


Figure 2.27: Tree top view of Oxley Park redeveloped at 30% capacity – View 2

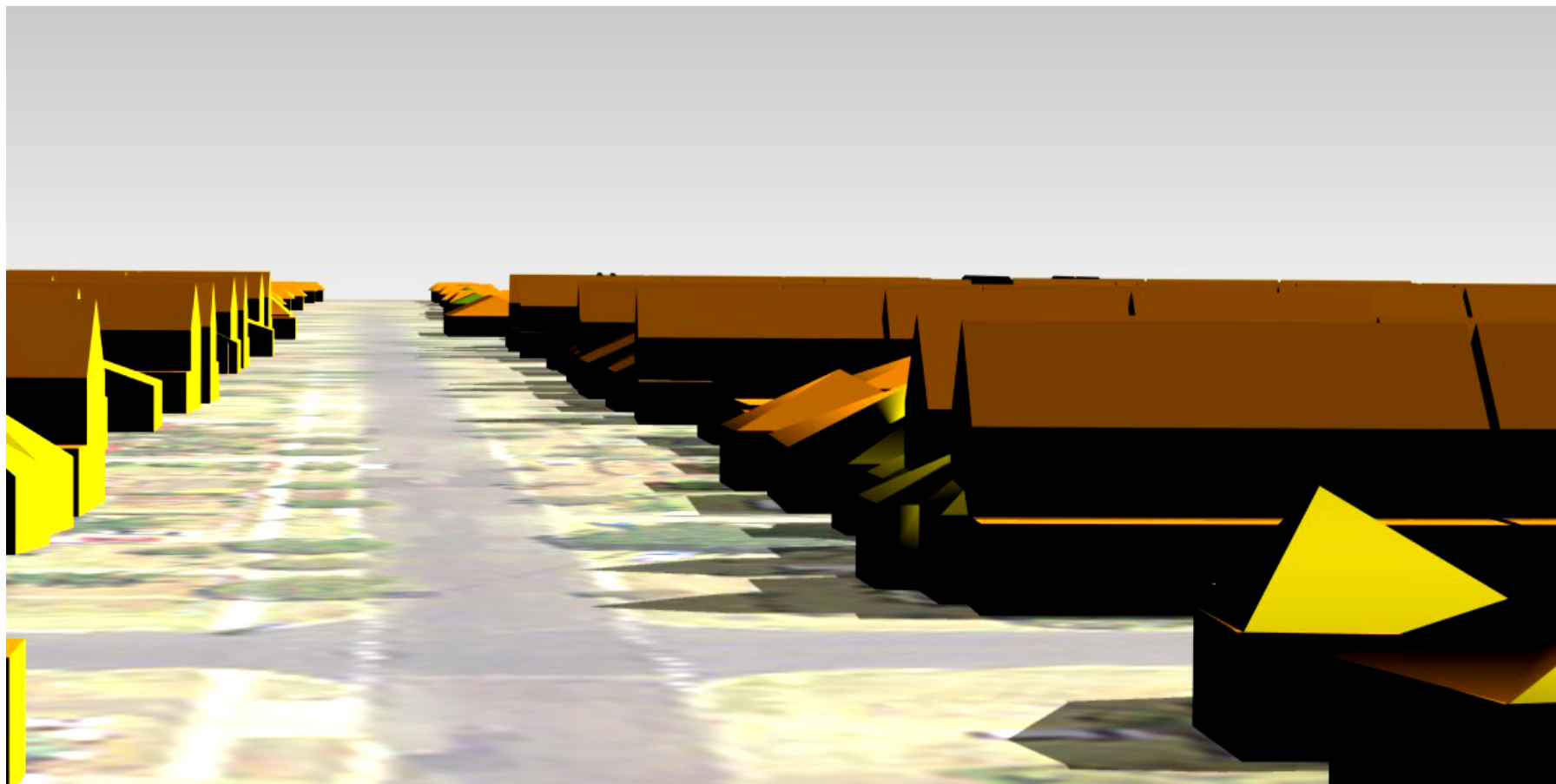


Figure 2.28: Pavement view of Oxley Park undeveloped – View 3

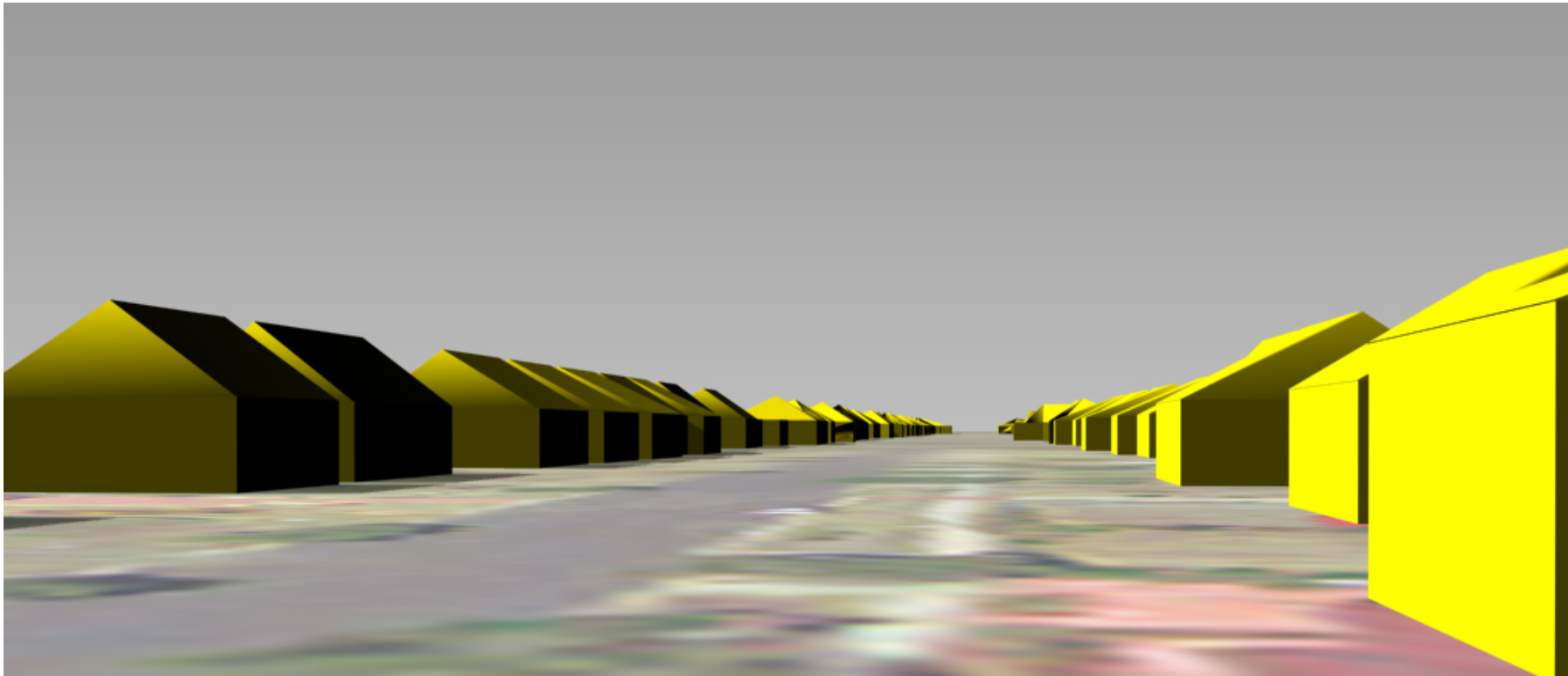
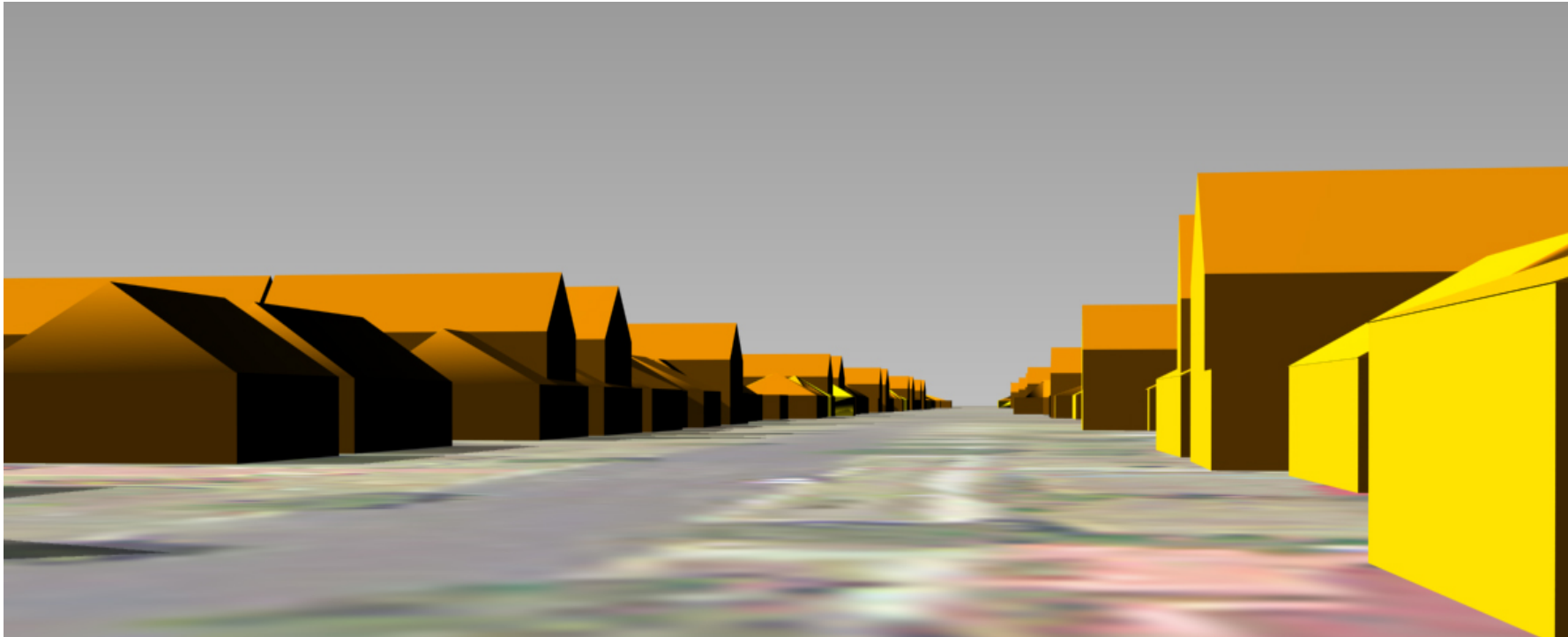


Figure 2.29: Pavement view of Oxley Park redeveloped at 30% capacity – View 2



2.5 WHAT WILL HAPPEN TO OLDER HOUSING AREAS WITHOUT URBAN RENEWAL?

Introduction

Current population and household trends were analysed in some detail at the suburb level in our previous report to Council⁵. In that analysis it was shown that some suburbs were losing both population and households as a result of both net out movement and falling household size. The question arises to what extent this level of loss might continue, given current trends. This short section presents an analysis of future household and population trends to 2071 based on changes that have occurred between 1991 and 2001, assuming there is no change to these trends and there is no significant change in terms of the redevelopment of existing suburbs to accommodate higher populations. While this is highly unlikely, it is nevertheless instructive to undertake such an exercise to highlight those parts of Penrith where population losses may have most impact on local communities and to illustrate where redevelopment will almost inevitably take place if population and household numbers fall further.

The trends in future population are presented using three methods. Firstly, an examination of changing household sizes in Penrith. Secondly, an examination of the changing number of residents in each of the suburban areas. Finally, future numbers of households are estimated using the changing number of households between 1991 and 2001. The analysis uses a concordance file from the ABS based on suburbs (or aggregation of suburbs) in Penrith. While the analysis is relatively unsophisticated, it does give an indication of the changing numbers of persons and households in areas in Penrith based on trends over the last ten years and the likely impact if these trends continue into the future.

Findings

Table 3.1 presents the number of *persons per household* between 1991 and 2071. The table analyses changing household size in suburbs in Penrith based on changes between 1991 and 2001. If the changes between 1991 and 2001 continue then by 2071, 12 of the 27 suburbs in Penrith will have an average household size of below 1 persons per household. In fact, 4 of these suburbs (Emu Plains, Kingswood, Leonay, South Penrith/Jamisontown) will have an average household size of 0 or below.

Table 3.2 examines future household trends based on the changing *number of persons* between 1991 and 2001. Under this methodology, 2 suburbs (Cambridge Park and Castlereagh) will have no population by 2051, with North St Marys and Leonay also approaching zero by 2071.

In Table 3.3, a third methodology is used to estimate future household trends in suburbs in Penrith. Here, the changing *number of households* between 1991 and 2001 is calculated, and then projected over time. Under this scenario, only one suburb –

⁵ Randolph, B. and Holloway, D. (2003) *Urban Growth in Penrith – A Research Report*, Urban Frontiers Program, University of Western Sydney.

Castlereagh – will reach zero population. However, this will be by 2021. Using this methodology Cambridge Park will also be approaching zero households by 2071.

Comment

Several suburbs appear to be trending downwards in population terms in this analysis: Castlereagh and Cambridge Park in particular, but also South Penrith/Jamisontown, Cambridge Gardens/Werrington County/Werrington Downs and North St Marys and North Penrith. On the other hand, current high growth areas are highlighted: Claremont Meadows, Cranebrook, Erskine Park, Glenmore Park and Kingswood.

While these figures are simply illustrative (indeed, are highly unlikely to proceed to the extent projected here), they highlight the very different fortunes of different Penrith suburbs if current trends continue unabated. Redevelopment in declining suburbs will undoubtedly work to halt such decline and stabilise local communities. As we have indicated in the previous section, significant redevelopment in these areas will reverse recent declines.

Table 3.1: Persons per household in Penrith suburbs, 1991-2071
Highlighted areas indicate less than one person per household

	1991	1996	2001	2011	2021	2031	2041	2051	2061	2071
Berkshire Park	3.56	4.08	4.73	5.90	7.07	8.24	9.41	10.58	11.75	12.91
Cambridge Gardens/Werrington County/Werrington Downs	3.49	3.37	3.21	2.92	2.64	2.36	2.08	1.79	1.51	1.23
Cambridge Park	3.04	2.84	2.81	2.59	2.37	2.14	1.92	1.70	1.47	1.25
Castlereagh	3.39	3.20	3.10	2.82	2.53	2.24	1.95	1.66	1.37	1.08
Claremont Meadows	3.27	3.11	3.21	3.15	3.09	3.03	2.97	2.91	2.85	2.79
Cranebrook/North Cranebrook	3.38	3.20	3.14	2.90	2.66	2.42	2.18	1.94	1.70	1.46
Emu Heights	3.29	3.21	3.15	3.01	2.87	2.73	2.59	2.45	2.31	2.17
Emu Plains	3.16	2.97	2.70	2.24	1.79	1.33	0.87	0.42	-0.04	-0.50
Erskine Park	3.39	3.65	3.53	3.67	3.80	3.94	4.08	4.22	4.36	4.50
Glenmore Park	3.28	3.10	3.18	3.08	2.97	2.87	2.77	2.67	2.57	2.47
Kemps Creek (incl Mt Vernon)	3.50	3.28	3.47	3.44	3.40	3.37	3.34	3.31	3.28	3.25
Kingswood	2.92	2.76	2.52	2.13	1.73	1.34	0.94	0.55	0.15	-0.24
Leonay	3.33	3.03	2.89	2.44	1.99	1.54	1.09	0.64	0.20	-0.25
Llandilo	3.79	3.57	3.37	2.95	2.53	2.12	1.70	1.28	0.86	0.44
Londonderry/Agnes Banks	3.27	3.07	3.03	2.78	2.54	2.30	2.05	1.81	1.56	1.32
Mulgoa (Rural Area)	3.49	3.20	3.28	3.07	2.87	2.66	2.45	2.25	2.04	1.83
Mulgoa Village	3.19	3.03	3.05	2.91	2.77	2.63	2.50	2.36	2.22	2.08
North Penrith	2.89	2.61	2.53	2.17	1.82	1.46	1.10	0.74	0.38	0.02
North St Marys	3.17	2.96	2.84	2.50	2.17	1.84	1.50	1.17	0.84	0.50
Orchard Hills/Luddenham (incl Badgerys Ck)	3.56	3.46	3.23	2.91	2.58	2.25	1.92	1.60	1.27	0.94
Penrith (suburb)	2.25	2.09	2.03	1.81	1.58	1.36	1.14	0.92	0.70	0.47
Regentville	3.22	2.93	2.88	2.54	2.19	1.85	1.51	1.17	0.83	0.48
South Penrith/Jamisontown	3.17	2.93	2.77	2.38	1.98	1.58	1.19	0.79	0.39	0.00
St Clair	3.58	3.50	3.38	3.19	3.00	2.81	2.61	2.42	2.23	2.03
St Marys/Colyton/Oxley Park	2.97	2.77	2.68	2.39	2.10	1.81	1.52	1.23	0.94	0.65
Wallacia Village	2.67	2.95	2.76	2.84	2.92	3.00	3.08	3.16	3.24	3.32
Werrington	2.82	2.69	2.56	2.29	2.03	1.77	1.50	1.24	0.98	0.72

Table 3.2: Number of Residents in Suburbs in Penrith, 1991-2071
Highlighted areas indicate negative population counts

	1991	1996	2001	2011	2021	2031	2041	2051	2061	2071
Berkshire Park	1,142	1,427	1,768	2,394	3,020	3,646	4,272	4,898	5,524	6,150
Cambridge Gardens/Werrington County/Werrington Downs	10,958	10,530	9,675	8,392	7,109	5,826	4,543	3,260	1,977	694
Cambridge Park	7,370	7,274	6,015	4,660	3,305	1,950	595	-760	-2,115	-3,470
Castlereagh	1,340	1,314	807	274	-259	-792	-1,325	-1,858	-2,391	-2,924
Claremont Meadows	1,444	3,241	3,432	5,420	7,408	9,396	11,384	13,372	15,360	17,348
Cranebrook/North Cranebrook	10,033	12,723	13,935	17,837	21,739	25,641	29,543	33,445	37,347	41,249
Emu Heights	3,237	3,322	3,260	3,283	3,306	3,329	3,352	3,375	3,398	3,421
Emu Plains	8,194	8,256	7,934	7,674	7,414	7,154	6,894	6,634	6,374	6,114
Ersine Park	5,216	6,629	6,914	8,612	10,310	12,008	13,706	15,404	17,102	18,800
Glenmore Park	1,029	8,183	16,682	32,335	47,988	63,641	79,294	94,947	110,600	126,253
Kemps Creek (incl Mt Vernon)	1,543	1,968	1,543	1,543	1,543	1,543	1,543	1,543	1,543	1,543
Kingswood	5,379	6,228	7,975	10,571	13,167	15,763	18,359	20,955	23,551	26,147
Leonay	2,778	2,555	2,468	2,158	1,848	1,538	1,228	918	608	298
Llandilo	962	938	903	844	785	726	667	608	549	490
Londonderry/Agnes Banks	3,831	3,776	3,960	4,089	4,218	4,347	4,476	4,605	4,734	4,863
Mulgoa (Rural Area)	969	1,441	1,010	1,051	1,092	1,133	1,174	1,215	1,256	1,297
Mulgoa Village	526	525	555	584	613	642	671	700	729	758
North Penrith	6,034	5,456	5,630	5,226	4,822	4,418	4,014	3,610	3,206	2,802
North St Marys	4,215	3,904	3,709	3,203	2,697	2,191	1,685	1,179	673	167
Orchard Hills/Luddenham (incl Badgerys Ck)	1,140	1,144	2,413	3,686	4,959	6,232	7,505	8,778	10,051	11,324
Penrith (suburb)	5,240	5,161	5,526	5,812	6,098	6,384	6,670	6,956	7,242	7,528
Regentville	570	777	757	944	1,131	1,318	1,505	1,692	1,879	2,066
South Penrith/Jamison town	18,533	17,177	16,542	14,551	12,560	10,569	8,578	6,587	4,596	2,605
St Clair	20,702	21,197	20,823	20,944	21,065	21,186	21,307	21,428	21,549	21,670
St Marys/Colyton/Oxley Park	19,409	19,282	19,262	19,115	18,968	18,821	18,674	18,527	18,380	18,233
Wallacia Village	813	918	1,003	1,193	1,383	1,573	1,763	1,953	2,143	2,333
Werrington	3,394	3,455	3,351	3,308	3,265	3,222	3,179	3,136	3,093	3,050

Table 3.3: Number of Households in Suburbs in Penrith, 1991-2071
Highlighted areas indicate negative household counts

	1991	1996	2001	2011	2021	2031	2041	2051	2061	2071
Berkshire Park	321	350	374	427	480	533	586	639	692	745
Cambridge Gardens/Werrington County/Werrington Downs	3,139	3,128	3,016	2,893	2,770	2,647	2,524	2,401	2,278	2,155
Cambridge Park	2,428	2,563	2,139	1,850	1,561	1,272	983	694	405	116
Castlereagh	395	411	260	125	-10	-145	-280	-415	-550	-685
Claremont Meadows	441	1,043	1,068	1,695	2,322	2,949	3,576	4,203	4,830	5,457
Cranebrook/North Cranebrook	2,968	3,971	4,437	5,906	7,375	8,844	10,313	11,782	13,251	14,720
Emu Heights	984	1,034	1,035	1,086	1,137	1,188	1,239	1,290	1,341	1,392
Emu Plains	2,596	2,784	2,939	3,282	3,625	3,968	4,311	4,654	4,997	5,340
Ersine Park	1,539	1,816	1,960	2,381	2,802	3,223	3,644	4,065	4,486	4,907
Glenmore Park	314	2,636	5,252	10,190	15,128	20,066	25,004	29,942	34,880	39,818
Kemps Creek (incl Mt Vernon)	441	600	445	449	453	457	461	465	469	473
Kingswood	1,843	2,255	3,160	4,477	5,794	7,111	8,428	9,745	11,062	12,379
Leonay	833	843	855	877	899	921	943	965	987	1,009
Llandilo	254	263	268	282	296	310	324	338	352	366
Londonderry/Agnes Banks	1,171	1,229	1,308	1,445	1,582	1,719	1,856	1,993	2,130	2,267
Mulgoa (Rural Area)	278	450	308	338	368	398	428	458	488	518
Mulgoa Village	165	173	182	199	216	233	250	267	284	301
North Penrith	2,086	2,092	2,222	2,358	2,494	2,630	2,766	2,902	3,038	3,174
North St Marys	1,329	1,317	1,307	1,285	1,263	1,241	1,219	1,197	1,175	1,153
Orchard Hills/Luddenham (incl Badgerys Ck)	320	331	746	1,172	1,598	2,024	2,450	2,876	3,302	3,728
Penrith (suburb)	2,330	2,470	2,726	3,122	3,518	3,914	4,310	4,706	5,102	5,498
Regentville	177	265	263	349	435	521	607	693	779	865
South Penrith/Jamison town	5,849	5,855	5,967	6,085	6,203	6,321	6,439	6,557	6,675	6,793
St Clair	5,786	6,053	6,152	6,518	6,884	7,250	7,616	7,982	8,348	8,714
St Marys/Colyton/Oxley Park	6,532	6,949	7,185	7,838	8,491	9,144	9,797	10,450	11,103	11,756
Wallacia Village	304	311	364	424	484	544	604	664	724	784
Werrington	1,204	1,283	1,311	1,418	1,525	1,632	1,739	1,846	1,953	2,060

2.6 WHO LIVES IN MULTI-UNIT HOUSING?

Introduction

Given the likely importance of higher density housing in Penrith, it is important to understand what kinds of demand the current higher density market caters for. While it may well change as new higher density housing is marketed to different groups, the current profile of higher density housing provides the only clue as to the overall impact on Penrith of a significant increase in such housing.

This section therefore analyses the socio-economic characteristics of multi-unit housing in Penrith using two data sets. The first examines the socio-economic profile of individuals and households who live in multi-unit developments in Penrith from the 2001 Census. The second data set analyses the socio-economic characteristics of individuals who moved into a multi-unit dwelling between 1996 and 2001 from a table specially commissioned from the Australian Bureau of Statistics (ABS).

A Socio-Economic Profile of Individuals in Multi-Unit Housing in Penrith

This section begins with a detail examination the socio-economic characteristics of individuals and households who resided in multi-unit dwellings in Penrith at the time of the 2001 Census. The analysis explores the main differences in the social profile of multi-unit dwellings and compares this against the wider Western Sydney and Sydney picture. Again, a limited range of census variable is used to develop a broad picture of the sector. Data are presented in Tables 4.1 and 4.2.

In 2001, 8,744 households accounting for 15,240 individuals lived in the multi-housing sector in Penrith. The sector accounted for 15% of all housing in Penrith at this time, but only 9% of the total population. Half these households lived in semi-detached housing, 41% lived in low rise flats and just 3% lived in high rise flats. A further 5% were classified as living in other multi-unit accommodation.

Household Type

Approximately a third of households living in flats in Penrith are families with children, compared to four in five of those who live in houses. However, this proportion is low compared to flats in Western Sydney as a whole, and for Sydney. Conversely almost half of households in flats in Penrith were single people (49%), as were 28% of those living in semi-detached housing, significantly higher than the figure for households in separate houses (11%) in Penrith and of approximately a third for the Western Sydney and Sydney as a whole. In all, a third (34%) of single person households in Penrith live in multi-unit housing.

Household income

The incomes of households in multi-unit developments in Penrith are markedly lower than those in separate houses and are also lower than the incomes for household in higher density housing in Western Sydney and Sydney. Only 23% of households in semi-detached dwellings, 11% of households in low rise flats, and 7% of households in high rise flats earned over \$1,000 per week. In fact, 34% of households who reside

in high rise flats and 33% in low rise flats in Penrith earned less than \$400 per week, compared to 20 per cent in Western Sydney and 15 per cent across Sydney. Given that a large proportion of households in the multi-unit sector are single persons (and therefore only able to generate one income) and a substantial proportion are older (see below), then the lower income profile of this sector is not surprising. But it is a factor that will need to be carefully considered in future plans for encouraging higher density housing in the Penrith.

Unemployment

Unemployment rates for residents in multi-unit dwellings in Penrith are significantly higher than the unemployment rates recorded for houses (3%). The rate reaches 7% of persons in flats, and 5% for semi-detached housing. These rates are similar to those for Western Sydney, but higher than the unemployment rate for multi-unit dwellings across Sydney (4%). Furthermore, there is a higher proportion of persons who are not in the labour force in higher density housing in Penrith compared to Western Sydney and Sydney.

Education

Interestingly, the proportion of persons in high rise flats in Penrith with a university degree⁶ (8%) is higher than that for low rise flats (7%) and semi-detached dwellings (6%) and houses (5%). This may reflect the presence of the University of Western Sydney in the area. However, the proportion of persons who reside in multi-unit dwellings in Penrith with a university degree is lower than that for Western Sydney, and significantly lower than for residents in higher density housing across Sydney.

Occupation

Multi-unit housing is less likely to house individuals employed in higher status occupations compared to comparable housing in Sydney as a whole. This is particularly true for Managers and Administrators and Associate Professionals. While the proportion of workers in multi-unit housing who are Professional workers is lower than that for Western Sydney and Sydney, the proportion who are Labourers is higher. There are also higher proportions of Intermediate Clerical, Sales and Services and Intermediate Production and Transport workers compared to Western Sydney and Sydney. There are also slightly higher proportions of persons employed as Tradespersons and Elementary Clerical, Sale and Service workers in semi-detached dwellings and low rise flats in Penrith when compared to Western Sydney and Sydney as a whole.

Age of household members

Children (aged 0-14) are less likely to live in multi-unit housing in Penrith than separate houses and also in comparison to similar higher density housing in Western Sydney, although the proportions are higher than for Sydney as a whole. While a quarter of people (25%) living in separate houses in Penrith are children, the figure is half that for those in flats (13%). However, there are proportionately more persons aged 15-34 in multi-unit dwellings compared to houses in Penrith. At the other end of the age spectrum, there are higher proportions aged over 65 years in semi-detached and flat dwellings in Penrith compared to houses.

⁶ A university degree refers to those persons with a Bachelor degree, Graduate Diploma, Graduate Certificate or Postgraduate degree.

Household mobility

The mobility of individuals in multi-unit dwellings in Penrith is high compared to the level of mobility among house dwellers in Penrith and compared to households in higher density housing in both Western Sydney and Sydney as a whole. Over half (54%) of individuals in semi-detached dwellings moved in during the five years before 2001. The equivalent figure for houses was 33%. This is a higher rate than the 46% recorded in Western Sydney and 44% recorded in Sydney. Similarly, residents in low rise flats recorded a 53% mobility rate, well above the regional and metropolitan average. In fact, only a quarter of individuals in low rise flats were residing in the same home five years before 2001. This is a very high level of mobility which, while reflecting the more recent development of some of this sector in Penrith, nevertheless is clearly related to the prevalence of private rental in this type of housing that engenders much greater turnover compared to home ownership or public rental. The higher density community is therefore a highly transient one. However, the proportion of households resident overseas five years before 2001 is much lower in Penrith's multi-unit population compared to Western Sydney and Sydney.

Country of origin

Individuals in multi-unit dwellings in Penrith are more likely to be Australian born when compared to higher density housing in Western Sydney and Sydney, but marginally more likely to be born overseas than households in houses in Penrith. Between 56% (low rise flats) and 64% (semi-detached dwellings) of persons in multi-unit dwellings in Penrith were born in Australia. The figure for houses is 69%. This compares to only one-third of persons living in flats in Western Sydney as a whole and just half of those in semi-detached dwellings. In Sydney, 55% of persons in semi-detached dwellings, 43% in low rise flats and 40% in high rise flats were born in Australia. Compared to Western Sydney and Sydney, overseas born individuals in multi-unit dwellings in Penrith are more likely to be born in the UK/Ireland or Europe and less likely to be from Asian countries or the Middle East.

Car ownership

Some 31 per cent of households in low rise flats and 36 per cent in a high rise flats do not own a car. This is much higher than the proportions recorded in Western Sydney and Sydney as a whole. Only 6% of Penrith house dwellers do not own a car. While this may reflect the emphasis given by planners to zoning multi-unit housing near prominent transport nodes, these results are much more likely to reflect the relatively lower incomes of households in these kinds of dwellings. Households in multi-unit dwellings in Penrith are also less likely to own more than 1 vehicle compared to those house dwellers and households in higher density housing in Western Sydney and Sydney.

Tenure

The multi-unit market in Penrith is essentially a rental market. Some 61% of semi-detached dwellings, 58% of low rise flats and 68% of high rise flats are rented (from either a private or public landlord). Approximately 45% of both semi-detached dwellings and low rise flats are privately rented whereas 38% of high rise flats are privately rented. The equivalent figure for houses is 14%. Some 30% of high rise flats are public rental dwellings, significantly higher than the proportion of public rented high rise units in Western Sydney and Sydney. While the proportion of rented low rise units is similar to that for Western Sydney and Sydney, the proportion of

semi-detached and high rise units being rented in Penrith is higher than that for Western Sydney and Sydney. The corollary is that the proportion of owners and purchasers in multi-unit dwellings in Penrith is much lower than that for Western Sydney and Sydney.

Dwelling size (Bedrooms)

Just over 60% of semi-detached dwellings in Penrith have 3 or more bedrooms, slightly higher than the proportions recorded across Western Sydney and Sydney. Flats are predominantly two bedroom: 74% of low rise flats having two or less bedrooms, as do 82% of higher rise flats. The proportion of 2 bed high rise units in Penrith is slightly higher than that for Western Sydney, but significantly higher than the proportion across Sydney as a whole.

Comment

Almost half of households in flats in Penrith are single people, although a third are households with children. Single people are also over-represented in semi-detached housing. A third of flat dwellers earn less than \$400 per week and less than one in ten earn over \$1,000 per week (approximately the *average* household income for Sydney). The low household incomes are, in part, related to the high number of single person households. Unemployment among flat dwellers is twice the rate among those living in houses. People living in flats are less likely to be children and more likely to be young adults or older people compared to those in houses. Mobility rates among multi-unit households are high, with over half having moved into their current home the five years before 2001. Car ownership levels were well below that of house dwellers, with a third of multi-unit households not owning a motor vehicle, a reflection of low incomes rather than choosing not to own a car. And the market is predominantly rented, with almost six in ten flats rented, compared to 14% of houses.

Compared to the multi-unit market in Western Sydney as a whole, households living in Penrith's multi-unit housing are much more likely to be single people, more likely to be on low incomes, be aged under 25, have moved in the last five years, be Australian born, rent from a private landlord and live in flats with two or fewer bedrooms. They are less likely to have a university degree or a higher status occupation, have been living overseas five years before the census, and less likely to have a car or own their home (either outright or buying) than others in the multi-unit market in Western Sydney.

The multi-unit market in Penrith therefore appears to be more socially and economically disadvantaged than the market across Sydney as a whole. This is not surprising given the relative affordability of Penrith's housing and relatively lower values and costs in the higher density market in Penrith.

Table 4.1: Selected characteristics of households and individuals by dwelling type in Penrith, 2001 (excludes individuals and households where dwelling type was not stated)

	Separate house	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Other	Total
Birthplace						
Australia	105,420	5,786	3,159	333	548	117,708
Oceania	3,159	341	251	21	13	3,883
UK/Ireland	9,263	575	375	24	71	10,594
Asia	5,672	450	453	36	35	6,797
Europe	16,898	879	697	56	121	19,114
Middle East	1,206	112	72	5	10	1,425
Other	2,709	173	121	19	10	3,109
Not Stated	7,917	734	525	40	90	9,726
Total	152,245	9,051	5,654	535	898	172,357
Age						
0-14 years	38,679	2,056	745	86	124	42,251
15-24 years	23,814	1,718	1,104	91	134	27,536
25-34 years	23,619	1,847	1,035	111	140	27,471
35-44 years	24,277	1,127	726	71	99	26,814
45-64 years	32,589	1,490	1,027	120	270	36,267
65 years or more	9,267	813	1,017	56	131	12,018
Total	152,245	9,051	5,654	535	898	172,357
5 Year Mobility Indicator						
Did not move	84,001	2,238	1,361	164	348	89,501
Have moved	48,263	4,927	2,986	245	408	58,119
Overseas in 1996	2,591	436	425	37	14	3,579
Not Stated	4,948	646	504	41	78	7,271
Not Applicable	12,442	804	378	48	50	13,887
Total	152,245	9,051	5,654	535	898	172,357
Number of Motor Vehicles						
None	2,915	835	1,125	98	93	5,113
1 motor vehicle	16,329	1,836	1,360	92	149	19,936
2 or more motor vehicles	27,118	889	292	17	72	28,605
Not Stated	2,451	430	516	42	77	3,589
Not Applicable	1,820	423	323	26	49	2,750
Total	50,633	4,413	3,616	275	440	59,993

Urban Growth Management in Penrith Stage 2 Report

	Separate house	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Other	Total
Weekly Rent						
\$0-\$99	1,311	590	432	73	55	2,476
\$100-\$199	3,745	979	1,410	105	131	6,412
\$200-\$299	3,111	1,012	181	4	0	4,345
\$300-\$399	253	9	8	0	0	275
\$400 or more	99	15	14	0	3	131
Not stated	291	98	60	7	9	472
Not applicable	41,823	1,710	1,511	86	242	45,882
Total	50,633	4,413	3,616	275	440	59,993
Family Type						
Couple family with children	24,008	658	248	20	46	25,143
Couple family without children	10,765	663	424	23	49	12,035
One parent family	6,460	904	409	46	31	7,902
Other family	438	86	46	4	0	580
Total	41,671	2,311	1,127	93	126	45,660
Household Type						
Lone person household	5,714	1,243	1,757	135	209	9,169
Group household	976	241	194	8	15	1,450
1/2/3 Family Household	40,799	2,282	1,122	91	127	44,746
Other	1,324	224	220	15	42	1,880
Not applicable	1,820	423	323	26	47	2,748
Total	50,633	4,413	3,616	275	440	59,993
Labour Force Status						
Employed	73,690	3,782	2,177	218	337	81,495
Unemployed	4,093	456	402	35	38	5,092
Not in the labour force	31,928	2,258	1,910	160	334	38,359
Not stated	3,855	499	420	35	63	5,156
Not applicable	38,679	2,056	745	87	126	42,255
Total	152,245	9,051	5,654	535	898	172,357

Urban Growth Management in Penrith Stage 2 Report

	Separate house	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Other	Total
Household Income						
Negative/Nil Income	183	30	25	0	13	254
\$1-\$199	905	238	265	28	37	1,494
\$200-\$299	1,709	373	552	42	58	2,775
\$300-\$399	2,682	362	348	24	36	3,479
\$400-\$499	2,424	295	301	26	44	3,108
\$500-\$599	1,965	231	210	21	33	2,480
\$600-\$699	2,419	268	241	17	23	2,993
\$700-\$799	2,290	233	194	10	12	2,757
\$800-\$999	4,920	393	239	25	23	5,634
\$1,000-\$1,199	4,757	292	182	5	21	5,292
\$1,200-\$1,499	5,824	273	116	4	8	6,259
\$1,500-\$1,999	7,036	307	86	7	12	7,517
\$2,000 or more	5,017	117	26	3	4	5,208
Not applicable	2,944	613	511	39	72	4,338
Not Stated	5,558	388	320	24	44	6,405
Total	50,633	4,413	3,616	275	440	59,993
Level of Non-School Qualification						
Postgraduate Degree Level	940	58	74	14	4	1,124
Graduate Diploma and Graduate Certificate Level	789	50	22	3	0	885
Bachelor Degree Level	6,504	435	293	27	25	7,455
Advanced Diploma and Diploma Level	5,350	316	200	20	30	6,050
Certificate Level	22,140	1,129	688	44	127	24,580
Level of education not stated	10,086	888	749	69	126	13,061
Level of education inadequately described	1,474	87	68	5	17	1,691
Not applicable	104,962	6,088	3,560	353	569	117,511
Total	152,245	9,051	5,654	535	898	172,357
Occupation						
Managers and Administrators	4,411	166	65	5	11	4,783
Professionals	8,533	515	231	31	27	9,534
Associate Professionals	7,850	440	207	23	34	8,717
Tradespersons and Related Workers	10,740	462	262	20	41	11,716
Advanced Clerical and Service Workers	3,241	127	52	7	13	3,488
Intermediate Clerical, Sales and Service Workers	14,873	821	489	58	61	16,514
Intermediate Production and Transport Workers	8,839	437	275	29	53	9,763
Elementary Clerical, Sales and Service Workers	7,652	441	278	19	26	8,515
Labourers and Related Workers	6,097	298	271	24	59	6,857
Not stated	820	41	36	0	14	919
Inadequately described	634	34	11	3	0	693
Not applicable	78,555	5,269	3,477	316	559	90,858
Total	152,245	9,051	5,654	535	898	172,357

Urban Growth Management in Penrith Stage 2 Report

	Separate house	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Other	Total
Tenure						
Fully Owned	17,298	497	483	21	101	18,572
Being Purchased	20,237	469	256	15	23	21,144
Rented from State Housing Authority	1,322	706	427	81	0	2,548
Rented from Other Sources	7,057	1,951	1,635	103	171	11,006
Rented - Landlord Not Stated	103	27	21	4	7	165
<i>Total Rented</i>	<i>8,482</i>	<i>2,684</i>	<i>2,083</i>	<i>188</i>	<i>178</i>	<i>13,717</i>
Other Tenure Type	810	85	154	3	40	1,113
Not stated	1,988	256	317	21	53	2,704
Not Applicable	1,818	422	323	27	45	2,741
Total	50,633	4,413	3,616	275	440	59,993
Number of Bedrooms						
None (including bedsitters)	38	64	100	0	28	234
1 bedroom	284	214	466	26	156	1,164
2 bedrooms	2,171	787	2,091	199	92	5,422
3 or more bedrooms	44,816	2,674	328	5	61	48,223
Not stated	1,504	251	308	19	54	2,200
Not applicable	1,820	423	323	26	49	2,750
Total	50,633	4,413	3,616	275	440	59,993

Table 4.2: Selected characteristics of households and individuals by dwelling type in Penrith, 2001 (excludes individuals and households where dwelling type was not stated) (%)

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
Birthplace									
Australia	63.9%	55.9%	62.3%	48.0%	34.1%	31.1%	55.4%	42.6%	38.9%
Oceania	3.8%	4.4%	3.9%	3.9%	4.5%	4.2%	3.8%	4.4%	3.9%
UK/Ireland	6.4%	6.6%	4.5%	3.2%	2.4%	2.0%	5.6%	4.8%	5.7%
Asia	5.0%	8.0%	6.8%	19.7%	25.5%	27.8%	11.5%	18.9%	18.9%
Europe	9.7%	12.3%	10.5%	8.6%	10.4%	12.6%	11.1%	11.4%	12.7%
Middle East	1.2%	1.3%	0.9%	5.2%	8.7%	8.0%	2.3%	3.7%	2.1%
Other	1.9%	2.1%	3.6%	4.6%	4.6%	4.4%	3.9%	4.4%	4.5%
Not Stated	8.1%	9.3%	7.5%	6.8%	9.7%	10.0%	6.4%	9.7%	13.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Age									
0-14 years	22.7%	13.2%	16.1%	23.0%	18.8%	18.5%	18.5%	14.2%	10.7%
15-24 years	19.0%	19.5%	17.0%	14.9%	13.8%	15.1%	13.1%	13.5%	15.4%
25-34 years	20.4%	18.3%	20.7%	19.0%	21.2%	24.3%	19.8%	24.9%	28.0%
35-44 years	12.5%	12.8%	13.3%	15.8%	16.7%	17.7%	16.4%	16.6%	15.8%
45-64 years	16.5%	18.2%	22.4%	18.2%	17.2%	16.8%	20.3%	17.9%	18.6%
65 years or more	9.0%	18.0%	10.5%	9.2%	12.3%	7.5%	11.9%	12.8%	11.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
5 Year Mobility Indicator									
Did not move	24.7%	24.1%	30.7%	30.2%	27.4%	23.7%	35.6%	29.0%	23.5%
Have moved	54.4%	52.8%	45.8%	46.0%	36.4%	36.1%	43.5%	39.9%	40.4%
Overseas in 1996	4.8%	7.5%	6.9%	9.4%	18.4%	22.6%	8.2%	15.5%	18.4%
Not Stated	7.1%	8.9%	7.7%	5.8%	9.6%	9.6%	5.5%	9.6%	13.2%
Not Applicable	8.9%	6.7%	9.0%	8.6%	8.3%	8.1%	7.2%	6.1%	4.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Number of Motor Vehicles									
None	18.9%	31.1%	35.6%	15.5%	27.7%	22.6%	15.6%	24.3%	22.8%
1 motor vehicle	41.6%	37.6%	33.5%	43.7%	39.9%	44.6%	43.6%	41.2%	39.0%
2 or more motor vehicles	20.1%	8.1%	6.2%	25.1%	10.0%	11.7%	24.9%	12.8%	12.6%
Not Stated	9.7%	14.3%	15.3%	8.3%	14.0%	13.1%	8.2%	12.7%	14.5%
Not Applicable	9.6%	8.9%	9.5%	7.4%	8.5%	8.0%	7.8%	9.0%	11.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weekly Rent									
\$0-\$99	13.4%	11.9%	26.5%	14.1%	16.4%	7.7%	8.6%	9.2%	5.4%
\$100-\$199	22.2%	39.0%	38.2%	12.6%	28.3%	26.1%	8.5%	16.2%	7.1%
\$200-\$299	22.9%	5.0%	1.5%	17.3%	11.7%	19.4%	9.4%	17.8%	14.8%
\$300-\$399	0.2%	0.2%	0.0%	3.2%	1.1%	3.0%	5.9%	6.7%	11.9%
\$400 or more	0.3%	0.4%	0.0%	0.7%	0.7%	1.3%	5.3%	2.8%	8.5%
Not stated	2.2%	1.7%	2.5%	2.1%	2.6%	2.1%	1.6%	1.9%	1.6%
Not applicable	38.7%	41.8%	31.3%	49.9%	39.2%	40.6%	60.8%	45.4%	50.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
Family Type									
Couple family with children	28.5%	22.0%	21.5%	42.4%	39.9%	41.7%	38.1%	31.6%	25.4%
Couple family without children	28.7%	37.6%	24.7%	28.5%	33.1%	33.0%	37.8%	43.6%	53.5%
One parent family	39.1%	36.3%	49.5%	26.6%	23.0%	20.9%	21.5%	20.4%	15.1%
Other family	3.7%	4.1%	4.3%	2.4%	4.0%	4.4%	2.7%	4.4%	6.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Household Type									
Lone person household	28.2%	48.6%	49.1%	23.7%	34.7%	26.6%	24.8%	35.4%	32.1%
Group household	5.5%	5.4%	2.9%	3.4%	4.7%	5.4%	5.9%	6.9%	7.8%
1/2/3 Family Household	51.7%	31.0%	33.1%	61.6%	45.3%	51.4%	57.0%	41.1%	36.9%
Other	5.1%	6.1%	5.5%	3.8%	6.8%	8.6%	4.5%	7.6%	12.1%
Not applicable	9.6%	8.9%	9.5%	7.4%	8.5%	8.0%	7.8%	9.0%	11.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Labour Force Status									
Employed	41.8%	38.5%	40.7%	39.9%	34.2%	41.0%	47.3%	46.9%	51.8%
Unemployed	5.0%	7.1%	6.5%	4.6%	6.5%	6.1%	3.5%	4.3%	3.5%
Not in the labour force	24.9%	33.8%	29.9%	28.4%	33.3%	27.3%	26.4%	27.1%	23.4%
Not stated	5.5%	7.4%	6.5%	4.1%	7.3%	7.0%	4.3%	7.5%	10.5%
Not applicable	22.7%	13.2%	16.3%	23.0%	18.8%	18.5%	18.5%	14.2%	10.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
Household Income									
Negative/Nil Income	0.7%	0.7%	0.0%	0.8%	1.2%	1.6%	0.8%	1.2%	1.8%
\$1-\$199	5.4%	7.3%	10.2%	5.7%	9.3%	5.0%	4.0%	5.6%	3.5%
\$200-\$299	8.5%	15.3%	15.3%	7.2%	9.7%	5.2%	7.0%	8.2%	5.0%
\$300-\$399	8.2%	9.6%	8.7%	8.3%	9.6%	8.1%	6.5%	6.5%	4.2%
\$400-\$499	6.7%	8.3%	9.5%	6.2%	6.9%	6.4%	5.4%	5.6%	4.1%
\$500-\$599	5.2%	5.8%	7.6%	4.9%	5.6%	5.8%	3.9%	4.9%	3.7%
\$600-\$699	6.1%	6.7%	6.2%	5.2%	5.6%	6.3%	4.2%	5.0%	3.9%
\$700-\$799	5.3%	5.4%	3.6%	4.5%	4.6%	4.5%	3.6%	4.4%	3.6%
\$800-\$999	8.9%	6.6%	9.1%	8.0%	7.4%	8.8%	6.8%	7.6%	6.9%
\$1,000-\$1,199	6.6%	5.0%	1.8%	7.4%	5.7%	7.7%	7.3%	7.7%	8.2%
\$1,200-\$1,499	6.2%	3.2%	1.5%	6.7%	4.3%	5.3%	5.8%	4.8%	4.2%
\$1,500-\$1,999	7.0%	2.4%	2.5%	8.9%	4.4%	7.6%	11.3%	8.5%	12.3%
\$2,000 or more	2.7%	0.7%	1.1%	5.8%	2.1%	3.8%	12.3%	6.2%	10.3%
Not applicable	13.9%	14.1%	14.2%	10.5%	14.1%	15.0%	11.3%	15.1%	20.5%
Not Stated	8.8%	8.8%	8.7%	9.9%	9.7%	8.9%	9.9%	8.7%	7.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
Level of Non-School Qualification									
Postgraduate Degree Level	0.6%	1.3%	2.6%	1.4%	2.0%	3.1%	3.2%	3.1%	4.4%
Graduate Diploma and Graduate Certificate Level	0.6%	0.4%	0.6%	0.6%	0.5%	0.9%	1.4%	1.2%	1.5%
Bachelor Degree Level	4.8%	5.2%	5.0%	7.6%	8.5%	11.7%	12.7%	13.5%	18.2%
Advanced Diploma and Diploma Level	3.5%	3.5%	3.7%	4.9%	5.0%	6.0%	6.1%	6.6%	7.6%
Certificate Level	12.5%	12.2%	8.2%	10.0%	9.0%	9.4%	10.4%	10.4%	9.4%
Level of education not stated	9.8%	13.2%	12.9%	8.9%	12.7%	11.8%	8.9%	12.5%	14.8%
Level of education inadequately described	1.0%	1.2%	0.9%	1.0%	1.1%	1.1%	1.2%	1.2%	1.3%
Not applicable	67.3%	63.0%	66.0%	65.5%	61.3%	56.0%	56.2%	51.5%	42.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Occupation									
Managers and Administrators	1.8%	1.1%	0.9%	2.4%	1.3%	2.1%	4.9%	3.4%	5.9%
Professionals	5.7%	4.1%	5.8%	6.8%	5.6%	8.7%	12.4%	11.3%	15.3%
Associate Professionals	4.9%	3.7%	4.3%	4.5%	3.2%	4.3%	6.0%	5.7%	7.3%
Tradespersons and Related Workers	5.1%	4.6%	3.7%	4.5%	3.9%	4.1%	4.0%	4.2%	3.2%
Advanced Clerical and Service Workers	1.4%	0.9%	1.3%	1.5%	0.9%	1.2%	2.0%	1.9%	2.4%
Intermediate Clerical, Sales and Service Workers	9.1%	8.6%	10.8%	7.6%	6.2%	7.5%	8.0%	8.3%	8.5%
Intermediate Production and Transport Workers	4.8%	4.9%	5.4%	4.1%	4.1%	3.9%	2.8%	3.3%	2.1%
Elementary Clerical, Sales and Service Workers	4.9%	4.9%	3.6%	3.9%	3.7%	4.1%	3.8%	4.3%	4.0%
Labourers and Related Workers	3.3%	4.8%	4.5%	3.7%	4.3%	4.3%	2.6%	3.4%	2.2%
Not stated	0.5%	0.6%	0.0%	0.6%	0.6%	0.5%	0.5%	0.5%	0.4%
Inadequately described	0.4%	0.2%	0.6%	0.4%	0.3%	0.4%	0.4%	0.4%	0.5%
Not applicable	58.2%	61.5%	59.1%	60.1%	65.8%	59.0%	52.7%	53.1%	48.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith			Western Sydney			Sydney SD		
	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block	Semi-detached	Flat/Unit in a block under 4 storeys	Flat/Unit in a four or more storey block
Tenure									
Fully Owned	11.3%	13.4%	7.6%	18.8%	11.5%	12.6%	27.7%	16.4%	17.9%
Being Purchased	10.6%	7.1%	5.5%	17.2%	8.5%	10.2%	18.3%	9.8%	9.9%
Rented from State Housing Authority	16.0%	11.8%	29.5%	17.2%	17.4%	8.5%	10.0%	8.9%	5.2%
Rented from Other Sources	44.2%	45.2%	37.5%	31.6%	41.8%	49.5%	28.0%	44.2%	42.5%
Rented - Landlord Not Stated	0.6%	0.6%	1.5%	0.6%	0.8%	0.7%	0.4%	0.6%	0.5%
Total Rented	60.8%	57.6%	68.4%	49.4%	60.0%	58.7%	38.4%	53.8%	48.2%
Other Tenure Type	1.9%	4.3%	1.1%	2.2%	3.2%	1.5%	2.5%	2.7%	1.9%
Not stated	5.8%	8.8%	7.6%	5.0%	8.3%	9.0%	5.3%	8.3%	11.0%
Not Applicable	9.6%	8.9%	9.8%	7.4%	8.5%	8.0%	7.8%	9.0%	11.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Number of Bedrooms									
None (including bedsitters)	1.5%	2.8%	0.0%	1.1%	2.9%	0.8%	0.7%	2.4%	3.4%
1 bedroom	4.8%	12.9%	9.5%	5.8%	13.6%	6.9%	5.3%	16.2%	16.9%
2 bedrooms	17.8%	57.8%	72.4%	21.7%	57.7%	66.8%	30.0%	54.0%	46.8%
3 or more bedrooms	60.6%	9.1%	1.8%	59.3%	9.3%	8.9%	51.4%	10.4%	11.2%
Not stated	5.7%	8.5%	6.9%	4.6%	8.0%	8.6%	4.8%	8.0%	10.7%
Not applicable	9.6%	8.9%	9.5%	7.4%	8.5%	8.0%	7.8%	9.0%	11.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2.7 A SOCIO-ECONOMIC PROFILE OF INDIVIDUALS WHO MOVED INTO MULTI-UNIT DWELLINGS IN PENRITH BETWEEN 1996 AND 2001

Introduction

An indicator of the where the demand for higher density housing is coming from can be deduced from an analysis of the characteristics of those who move into the sector. The Census provides information on individuals who were resident at an address other than their address at census night five years preceding the census date, in this case in 1996. While the Census does not ask households to state when the last move was made or to how many moves were made between 1996 and 2001, the information on migrants at least provides some indication of the characteristics of recent movers into the higher density sector in terms of both their social profile and their previous locational history. This section analyses the social profile of individuals in a semi-detached house or flat in Penrith and who were living elsewhere five year preceding the census in 2001. The analysis takes the form of a review of a range of census variables to provide a broad picture of the kinds of people and households moving in over this time. For the purposes of this analysis, which is primarily concerned with the private housing market, public renters have been merged with the other smaller tenure categories, although they comprise the majority of the resulting “Other Tenure” group.

Tenure profile of in-movers

Between 1996 and 2001, 8,938 individuals moved into multi-unit housing Penrith (Table 4.3), accounting for 5% of the population resident in 2001. Of these individuals 5,804 or 65% were renting privately, 1,103 (11%) had bought their dwelling, while 14% moved into another tenure type, mainly public renting. Only 8% of these individuals owned their dwelling outright, while 11 per cent were home buyers. The high proportion of private renters is to be expected, given the much higher mobility rates in this sector, and this is typical of the higher density market. Across the different dwelling types the picture was generally the same, although a third (34%) of persons who moved into high rise flats were renting from other sources, again principally in public housing (although in absolute the terms the number involved was low).

Table 4.3: Dwelling type by tenure for those who moved into multi-unit dwellings between 1996 and 2001, Penrith

	Fully Owned	Being Purchased	Rented Privately	Other Tenure	Tenure Not Stated	Total
Semi-detached Dwellings	367 (6.9%)	654 (12.4%)	3,428 (64.8%)	775 (14.7%)	65 (1.2%)	5,289 (100.0%)
Flats in a block of less than 4 storeys	312 (9.2%)	329 (9.7%)	2,242 (66.4%)	419 (12.4%)	76 (2.2%)	3,378 (100.0%)
Flats in a block of 4 or more storeys	11 (4.1%)	30 (11.1%)	134 (49.4%)	93 (34.3%)	3 (1.1%)	271 (100.0%)
Total	690 (7.7%)	1,013 (11.3%)	5,804 (64.9%)	1,287 (14.4%)	144 (1.6%)	8,938 (100.0%)

Social profile of in-movers

Age

Table 4.4 sets out an analysis of the social characteristics of individuals and households who moved into higher density housing between 1996 and 2001⁷. Looking first at the age profile, individuals who moved into multi-unit dwellings tended to be younger than the population as a whole, and renters much younger than owners. Among recent in-movers who were renting, ages were overwhelmingly young, with 75% of those moving into rented semi-detached housing aged under 35, as were 66% of those moving into rented flats. Only 14% of renters moving into semi-detached houses were aged over 45, as were 20% of those renters moving into a flat. Less than 3% were aged over 65.

The ages of home owners and buyers were much less polarised: 51% of those who had purchased a semi were aged under 35 as were 43% of those buying a low rise flat. On the other hand, 37% of those who had purchased a semi were aged over 45, as were 42% of those buying a flat. In all, 15% of individuals buying or owning their semi or unit were aged over 65. There is some evidence, therefore, of an older home buyer demand for medium and higher density housing, although this remains a minority.

Country of birth

While the majority of individuals who moved into a multi-unit dwelling in Penrith between 1996 and 2001 were born in Australia, in line with the population as a whole, the proportions were lower for flats. Between 66% and 77% of persons in semi-detached dwellings were born in Australia (depending on tenure), compared to 60% to 64% in low rise flats and 54% to 72% in high rise flats. Perhaps surprisingly, purchasers were less likely to be Australian born than renters.

Some 10% of persons in semi-detached dwellings who were owners/purchasers were born in north west Europe or Asia, while 9% of persons in other forms of tenure in semi-detached dwellings were born in north west Europe.

There were high proportions of individuals born in Asia who had moved into a low rise flat either as an owner/purchaser (11%) or private renter (11%). A significant proportion of owners/purchasers who moved in both high (12%) and low rise flats (11%) were born in south or eastern Europe. Further, 15% of owners/purchasers in high rise flats were born in Asia, while 16% of persons who moved into a low rise flat in Penrith in another form of tenure were born in north west Europe.

Household type

Significant proportions of multi-unit movers were lone person households and one parent families, particularly in the flat sector. There was a higher proportion of couples with children moving into semi-detached housing than was the case for flats. The reverse was true for lone person households, with around twice the proportions of this group either buying or renting a low rise flat compared to semi-detached housing. Lone persons were particularly over-represented among home buyers in low rise flats, where this group accounted for 40% of all in-movers. This reflects the likely role

⁷ To further simplify the analysis in this section, outright owners and home buyers (mortgagors) have been grouped together into one owner/purchaser category.

played by the flat market in providing affordable home purchase opportunities for single people.

Single parents accounted for a higher proportion of mover households either buying or renting semi-detached housing compared to flats. The specific role played by the higher density public housing sector in Penrith is illustrated by the fact that almost half (48%) of households moving into semi-detached housing classified as “other tenure” were single parents, while half (51%) those moving into low rise flats in this tenure category were single people. These latter two findings reflect the specific allocation policies of the NSW Department of Housing.

Education

The educational qualifications of those persons who moved into a multi-unit dwelling in Penrith between 1996 and 2001 showed some variation by dwelling type. Marginally higher proportions of owners/purchasers and private renters in semi-detached dwellings held a Bachelor Degree, Certificate or Post-Graduate Diploma/Certificate than was the case with those moving into flats. On the other hand, the proportion of individuals who moved into flats with a Postgraduate Degree was marginally higher. Significantly lower proportions of persons who were in another form of tenure had an educational qualification compared to the other tenure groups.

Income

Not surprisingly, the incomes of owners/purchasers who moved into a multi-unit dwelling in Penrith between 1996 and 2001 was generally higher than that for private renters. Some 24% of owners/purchasers who moved into semi-detached dwellings, 8% in low rise flats and 22% in high rise flats earned more than \$1,500 per week. This compares with 17% of private renters in semi-detached dwellings, 7% in low rise flats and 10% in high rise flats who earn more than \$1,500 per week. The proportion of households who moved into a multi-unit dwelling in another tenure category and earn more than \$1,500 per week was even lower again.

On the other hand, the incomes of households moving into semi-detached housing tended to be generally higher, on average, than those moving into flats. This seems to hold regardless of whether the household was renting or an owner/purchaser. The higher cost of this form of accommodation, and its generally larger size and higher amenity is the likely explanation for this: rents and prices of semi-detached housing are likely to be higher than for flats.

Interestingly, similar proportions of owners/purchaser and private renters who moved between 1996 and 2001 earn less than \$400 per week. Some 15% of owners/purchasers in semi-detached dwellings, 24% in low rise flats and 17% in high rise flats earned less than \$400 per week. This was similar to the comparable proportion for private renters (11% for semi-detached dwellings, 23% for low rise flats and 17% for high rise flats). The former may well reflect the numbers of older people buying multi-unit housing as they downshift, and ties in with the higher proportions of older people in this type of property noted above. The proportion of lower income households moving into rental multi-unit accommodation is to be expected.

Significantly more in-movers in other tenure groups earned less than \$400 per week (45% in semi-detached dwellings, 58% in low rise flats and 31% in high rise flats), a reflection of the high proportion of public renters in this group.

Employment status

Several points are worth noting about the differential employment status of recent movers into multi-unit housing. Those moving into semi-detached houses were more likely to be in employment than those moving into flats, particularly if they owned or were buying their home: 63% of owners in semis were in work compared to 49% of flat owners. As a result, labour force participation rates were much higher for recent movers who own semi-detached housing compared to owners of flats.

Other the other hand only 19% of in-movers in the other tenure category in semi-detached dwellings, 21% in low rise flats and 26% in high rise flats were employed, clearly a reflection of the high proportion of public rental in this group. Labour force participation was also much lower in this other tenure category.

Occupation

Generally speaking owner/purchasers of both semis and flats were more likely to be Managers, Administrators and Professional workers while employed individuals in rental tenure category were more likely to be employed in lower skill and status occupations, such as Intermediate Production and Transport workers, Intermediate Clerical, Sales and Service workers and Elementary Clerical, Sales and Service workers. For persons in other tenure categories in semi-detached dwellings there were significant concentrations of Intermediate Production and Transport workers, Intermediate Clerical, Sales and Service workers and Elementary Clerical, Sales and Service workers and Labourers and Related workers.

The proportions of higher status managerial and professional workers were higher in owner/purchasers in semi-detached housing (40%) compared to flats (27%). There was similarly a higher proportion of managers and professionals who were renting semis compared to those renting flats.

There was a particularly large concentration (29%) of in-movers in low rise flats who were employed as Intermediate Clerical, Sales and Service workers. Some 22% of person in low rise flats who were private renters were also employed as Intermediate Clerical, Sales and Service workers. For persons who moved into a low rise flat and were in the other tenure category there was a significant proportion of Elementary Clerical, Sales and Service workers and Labourers and Related workers.

A large concentration (69%) of Professional and Associate Professional moving into high rise flats were owners/purchasers. This was two to three times the proportion in other dwelling types. In fact, compared to other dwelling types, there was a significant concentration of Professional and Associate Professional workers who were renting privately (27%) or in another form of tenure (38%). For both private renters and persons in the other tenure category there was also a large proportion of Intermediate Production and Transport workers, Intermediate Clerical, Sales and Service workers.

Rents

Persons who moved into a multi-unit dwelling in Penrith between 1996 and 2001 and renting privately paid much more weekly rent than those in the other tenure category. Some 62% of private renters in semi-detached dwellings paid between \$175 and \$224 per week, whereas 62% of private renters in low rise flats and 71% in high rise flats paid between \$125 and \$174 per week. Conversely, for those in-movers in the other tenure category, 60% in semi-detached dwellings, 64% in low rise flats and 61% in high rise flats paid less than \$100 per week in rent.

Comment

The analysis of the social profile of multi-unit households who were not living at their current address five years earlier largely conforms to the overall profile described above for the sector as a whole. However, a number of clear differences emerge when the social profile of in-movers is split by tenure. One of the clearest is the fact that home buyers, outright owners *and* private renters moving into semi-detached housing had higher incomes than those moving into flats, and of those moving into semi-detached public housing. Over a half of the former groups had household incomes over \$800 per week, compared to only a third of those moving into low rise flats (and just one in eight of those moving into semi-detached public housing). The larger proportion of older people moving into low rise flats accounts for some of this discrepancy. This income differential reflects higher employment rates and a greater proportion of workers in higher status white collar occupations.

Employment levels among movers into a semi-detached were roughly the same for both home owners/buyers and private renters. Private renters moving into low rise flats were more likely to be employed than those who were buying this kind of property (perhaps a reflection of retired buyers in the latter market).

Recent movers into the flat market were more likely to be single person households, a feature that was most pronounced among home owners/purchasers. This may be associated with the fact that in-movers to flats were more likely to be older than those moving into semis. This is again a reflection of the lower entry costs for the sector, which offers an affordable options for single people on moderate incomes, and also the market in older persons multi-unit accommodation (developed under SEPP5).

The cost differential is confirmed in the rent levels paid. Rents of recent movers in semi-detached homes were clustered in the \$175 to \$250 per week range, while they were in the lower \$100 to \$175 range for flats. Rents for public tenants were much lower, clustering in the \$25 to \$100 per week range.

There is, therefore, a clear differentiation in the market segmentation of households moving into private sector semi-detached housing and those moving into flats in terms of income and employment, with the former much more likely to have middle and higher incomes compared to the latter. This is clearly related to the differential costs of each sector, with the flat market offering both lower cost ownership and rental options compared to the semi-detached sector.

Table 4.4: Socio-economic profile of individuals who moved into a multi-unit dwelling in Penrith between 1996 and 2001

	Semi-detached Dwellings			Flats in a block of less than 4 storeys			Flats in a block of 4 or more storeys		
	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure
Number of Individuals	1,021	3,428	775	641	2,242	419	41	134	93
Number of households									
Age									
0-14	8.8%	14.0%	22.1%	5.0%	7.4%	5.0%	0.0%	5.2%	6.5%
15-24	15.2%	29.8%	13.2%	16.5%	33.1%	14.1%	14.6%	26.9%	20.4%
25-34	26.6%	29.3%	19.9%	20.6%	26.2%	17.9%	43.9%	35.1%	15.1%
35-44	13.4%	12.4%	12.6%	14.7%	13.4%	8.1%	19.5%	14.2%	17.2%
45-54	15.5%	8.7%	7.1%	10.6%	9.8%	10.5%	14.6%	11.2%	12.9%
55-64	7.7%	2.9%	5.8%	10.8%	5.5%	8.1%	7.3%	3.7%	6.5%
65 and over	12.7%	2.6%	14.5%	20.1%	4.5%	33.9%	0.0%	3.7%	12.9%
Not Stated	0.0%	0.3%	4.9%	1.7%	0.0%	2.4%	0.0%	0.0%	8.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Birthplace									
Australia	66.4%	71.5%	77.3%	60.2%	64.0%	64.0%	53.7%	72.4%	57.0%
Oceania	1.3%	6.8%	3.9%	1.6%	6.7%	3.6%	0.0%	3.0%	10.8%
North-West Europe	9.4%	7.1%	9.2%	9.0%	6.5%	16.0%	7.3%	4.5%	8.6%
Southern and Eastern Europe	6.0%	1.6%	3.0%	11.1%	3.2%	2.9%	12.2%	7.5%	0.0%
Asia	9.5%	7.4%	1.9%	11.1%	11.7%	3.1%	14.6%	8.2%	6.5%
Middle East	1.4%	1.4%	1.2%	1.4%	2.2%	0.7%	0.0%	2.2%	0.0%
North Africa	0.5%	0.5%	0.0%	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%
Northern America	0.6%	0.3%	0.4%	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%
South and Central America	0.9%	1.0%	1.4%	1.9%	0.8%	1.7%	0.0%	0.0%	3.2%
Other Africa	0.6%	0.8%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%	0.0%
Not Stated	3.5%	1.6%	1.8%	2.8%	2.6%	8.1%	12.2%	0.0%	14.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

	Semi-detached Dwellings			Flats in a block of less than 4 storeys			Flats in a block of 4 or more storeys		
	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure
Household Type									
Couple family with children	28.5%	27.0%	19.2%	17.9%	18.0%	5.7%	26.8%	11.2%	21.5%
Couple without children	23.7%	19.5%	9.8%	21.1%	18.2%	13.8%	36.6%	23.1%	3.2%
Single Parent family	16.6%	27.5%	47.5%	13.1%	21.0%	15.3%	0.0%	23.1%	16.1%
Lone Person Household	22.2%	11.4%	17.4%	39.9%	24.4%	51.3%	36.6%	38.8%	23.7%
Group Household	4.5%	11.7%	1.7%	4.7%	13.7%	5.3%	0.0%	3.7%	6.5%
Other/Not stated	4.5%	2.9%	4.4%	3.3%	4.7%	8.6%	0.0%	0.0%	29.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Post-School Qualification									
Postgraduate degree	1.8%	1.0%	0.0%	2.0%	1.9%	0.0%	0.0%	2.4%	0.0%
Graduate Diploma or Graduate Certificate	1.6%	1.2%	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%
Bachelor Degree	10.6%	9.0%	0.5%	9.2%	8.0%	5.4%	7.3%	5.5%	3.8%
Advanced Diploma nad Diploma	6.8%	5.8%	2.8%	6.5%	5.0%	3.1%	7.3%	10.2%	3.8%
Certificate	19.9%	19.3%	13.4%	17.4%	17.8%	7.0%	0.0%	15.0%	15.2%
Not Stated/Not Applicable	59.3%	63.8%	83.2%	64.9%	66.4%	83.8%	85.4%	66.9%	77.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Semi-detached Dwellings			Flats in a block of less than 4 storeys			Flats in a block of 4 or more storeys		
	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure
Household Income									
Less than \$200	5.0%	2.0%	9.8%	4.2%	4.2%	19.8%	7.3%	2.2%	12.9%
\$200-\$299	4.7%	2.9%	14.1%	12.5%	7.2%	25.1%	9.8%	6.7%	6.5%
\$300-\$399	5.6%	6.5%	21.2%	7.5%	11.7%	13.1%	0.0%	8.2%	11.8%
\$400-\$499	6.8%	6.0%	12.8%	10.3%	10.0%	7.2%	9.8%	12.7%	0.0%
\$500-\$599	3.5%	7.0%	8.1%	6.7%	8.3%	2.4%	7.3%	10.4%	3.2%
\$600-\$699	6.2%	7.9%	6.5%	9.4%	9.8%	3.8%	0.0%	9.0%	10.8%
\$700-\$799	8.9%	6.4%	3.5%	7.2%	7.9%	4.3%	7.3%	5.2%	3.2%
\$800-\$999	10.5%	13.6%	4.6%	8.0%	12.4%	3.3%	7.3%	17.9%	10.8%
\$1,000-\$1,199	8.5%	10.7%	3.9%	9.7%	8.0%	0.0%	0.0%	2.2%	0.0%
\$1,200-\$1,499	12.1%	12.1%	2.1%	8.1%	7.1%	2.6%	7.3%	0.0%	7.5%
\$1,500-\$1,999	14.5%	13.2%	1.5%	7.3%	4.1%	2.1%	22.0%	10.4%	3.2%
\$2,000 or more	9.7%	3.4%	0.8%	1.1%	2.5%	1.4%	0.0%	0.0%	3.2%
Not Stated	4.0%	8.3%	11.2%	8.1%	6.8%	14.8%	22.0%	14.9%	26.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Labour Force Status									
Employed	63.3%	59.8%	18.2%	48.8%	54.8%	21.0%	63.4%	62.7%	25.8%
Unemployed	3.7%	6.7%	8.8%	3.0%	11.0%	7.9%	0.0%	11.2%	9.7%
Labour Force	67.0%	66.5%	27.0%	51.8%	65.8%	28.9%	63.4%	73.9%	35.5%
Not in the labour force	23.8%	19.6%	46.6%	36.2%	25.6%	60.6%	34.1%	18.7%	43.0%
Not stated	9.2%	13.9%	26.5%	12.0%	8.6%	10.5%	2.4%	7.5%	21.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Semi-detached Dwellings			Flats in a block of less than 4 storeys			Flats in a block of 4 or more storeys		
	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure	Owned/Being Purchased	Privately Rented	Other Tenure
Occupation									
Managers and Administrators	6.8%	3.3%	2.1%	3.2%	2.2%	3.4%	0.0%	3.6%	0.0%
Professionals	21.5%	12.5%	2.8%	12.8%	11.8%	10.2%	42.3%	14.3%	25.0%
Associate Professionals	11.3%	12.0%	12.1%	10.9%	9.3%	9.1%	26.9%	13.1%	12.5%
Tradespersons and Related Workers	7.3%	14.0%	5.0%	9.6%	13.5%	12.5%	19.2%	8.3%	0.0%
Advanced Clerical and Service Workers	4.5%	3.1%	0.0%	1.9%	2.2%	3.4%	0.0%	6.0%	0.0%
Intermediate Clerical, Sales and Service Workers	21.5%	22.5%	21.3%	29.1%	22.2%	10.2%	11.5%	28.6%	25.0%
Intermediate Production and Transport Workers	7.4%	11.6%	20.6%	10.2%	11.7%	8.0%	0.0%	14.3%	25.0%
Elementary Clerical, Sales and Service Workers	9.6%	11.6%	19.1%	9.9%	14.7%	18.2%	0.0%	0.0%	12.5%
Labourers and Related Workers	5.6%	7.6%	7.8%	5.1%	11.7%	25.0%	0.0%	11.9%	0.0%
Not Stated	4.5%	1.9%	9.2%	7.3%	0.7%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weekly Rent									
\$0-\$24	0.0%	0.1%	3.2%	0.0%	0.0%	6.0%	0.0%	0.0%	3.2%
\$25-\$49	0.0%	0.1%	13.8%	0.0%	0.5%	29.6%	0.0%	0.0%	30.1%
\$50-\$74	0.0%	1.0%	30.1%	0.0%	0.9%	20.0%	0.0%	0.0%	14.0%
\$75-\$99	0.0%	1.1%	13.2%	0.0%	1.0%	8.4%	0.0%	0.0%	14.0%
\$100-\$124	0.0%	3.3%	8.4%	0.0%	8.3%	2.9%	0.0%	14.2%	3.2%
\$125-\$149	0.0%	4.1%	3.9%	0.0%	38.4%	4.5%	0.0%	55.2%	17.2%
\$150-\$174	0.0%	8.2%	5.4%	0.0%	23.8%	3.3%	0.0%	17.2%	0.0%
\$175-\$199	0.0%	22.2%	3.2%	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%
\$200-\$224	0.0%	40.0%	1.8%	0.0%	9.4%	1.4%	0.0%	0.0%	3.2%
\$225-\$249	0.0%	13.8%	0.8%	0.0%	4.8%	0.0%	0.0%	2.2%	0.0%
\$250-\$274	0.0%	2.9%	0.4%	0.0%	1.2%	0.0%	0.0%	2.2%	0.0%
\$275-\$299	0.0%	0.7%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
\$300-\$399	0.0%	0.3%	0.8%	0.0%	0.8%	0.0%	0.0%	2.2%	0.0%

Urban Growth Management in Penrith Stage 2 Report

\$400-\$499	0.0%	0.2%	0.8%	0.0%	0.3%	0.7%	0.0%	2.2%	0.0%
\$500 and over	0.0%	0.6%	0.0%	0.0%	1.2%	1.4%	0.0%	2.2%	0.0%
Not stated/Not applicable	100.0%	1.4%	14.3%	100.0%	1.4%	21.7%	100.0%	2.2%	15.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2.8 WHERE DID PEOPLE MOVING INTO MULTI-UNIT HOUSING COME FROM?

The locational origins of people who were not living in their current accommodation in 1996 provide an indication of where the demand for higher density housing in Penrith is coming from. In this section we analyse the location of households who were living in another address in 1996. Data are presented in Table 4.5 disaggregated by housing tenure.

Between 1996 and 2001 some 5,289 individuals moved into a semi-detached dwelling in Penrith, while 3,378 moved into a low rise flat and only 271 moved into a high rise flat. For semi-detached dwellings, 49% moved from within Penrith while 41% of persons in low rise flats and 47% in high rise flats moved from within the City (Figure 4.1).

Almost half (45%) of the demand for multi-unit housing in Penrith is generated from within the City. For persons who moved into a semi-detached dwelling, 9% also moved from Blacktown, 8% from overseas and around 7% each from other parts of western Sydney, the east and north of Sydney and from rural and regional NSW. Similarly, in low rise flats 10% moved from Blacktown, 12% from overseas, 9% from other parts of Western Sydney and 8% from the rest of Sydney. Of those who moved into high rise flats, 11% were from other parts of Sydney (predominantly east, north and southern parts of the city) while 9% migrated from overseas.

Around half of all persons who moved into a semi-detached dwelling in Penrith between 1996 and 2001 were owners/purchasers, private renters or from other tenure groups. Higher proportions of owners/purchasers who moved in semi-detached dwellings came from 'other Western Sydney' (10%) and 'other Sydney' (12%). After Penrith itself, higher proportions of private renters moved from overseas or rural and regional NSW. Of those who were in other tenure categories, larger proportions were from Blacktown and 'other Western Sydney'.

Of those who moved into a low rise flat in Penrith between 1996 and 2001, 41% of owners/purchasers, 38% of private renters and 55% of other tenure categories were from within the Penrith LGA. Some 13% of owners/purchasers of low rise flats were from 'other Sydney' while a further 9% were from 'other Western Sydney'. Interestingly, 15% of private renters who moved into a low rise flat were from overseas and a further 11% were from Blacktown LGA. Of those in the 'other tenure' category 9% were from 'other western Sydney' and rural and regional NSW.

Comment

Much of the demand for multi-unit housing in Penrith comes from the local area. If the numbers coming from the Blue Mountains and Blacktown are added, then around six in ten moves into the sector are accounted for by these three LGAs.

Figure 4.1: The previous residential location of individuals who moved into multi-unit dwellings in Penrith between 1996 and 2001 by dwelling type.

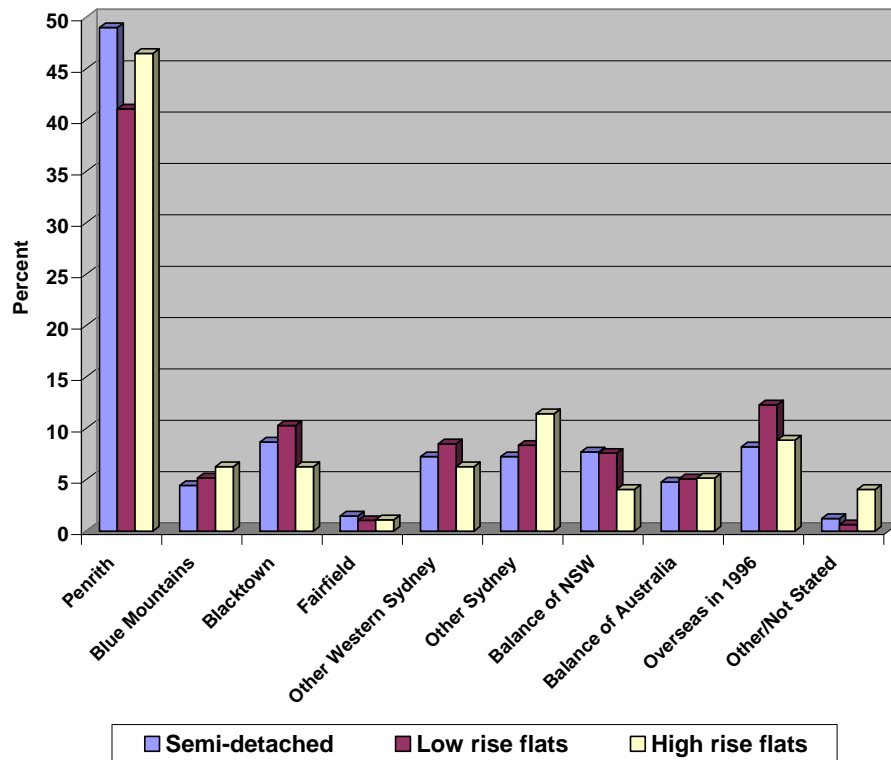


Table 4.5: The previous residential location of individuals who moved into multi-unit dwellings in Penrith between 1996 and 2001 by tenure

	Previous Location	Owned/Being Purchased	Privately Rented	Other Tenure Type	Tenure Type Not Stated	Total
Semi-detached Dwellings	Penrith	525	1,663	380	24	2,592
	Blue Mountains	65	147	23	0	235
	Blacktown	54	296	103	6	459
	Fairfield	28	41	9	0	78
	Other Western Sydney ⁸	106	207	70	0	383
	Other Sydney ⁹	120	202	58	3	383
	Balance of NSW	46	298	58	6	408
	Balance of Australia	37	195	20	0	252
	Overseas in 1996 ¹⁰	40	369	16	9	434
	Other/Not Stated	0	10	38	17	65
	Total	1,021	3,428	775	65	5,289
Flats in a block of less than 4 storeys	Penrith	265	855	232	36	1,388
	Blue Mountains	44	103	23	5	175
	Blacktown	50	246	32	19	347
	Fairfield	11	21	3	0	35
	Other Western Sydney	59	192	36	0	287
	Other Sydney	84	157	30	11	282
	Balance of NSW	31	188	37	0	256
	Balance of Australia	21	137	9	5	172
	Overseas in 1996	65	343	7	0	415
	Other/Not Stated	11	0	10	0	21
	Total	641	2,242	419	76	3,378
Flats in a block of 4 or more storeys	Penrith	14	63	49	0	126
	Blue Mountains	6	8	3	0	17
	Blacktown	0	11	6	0	17
	Fairfield	0	0	3	0	3
	Other Western Sydney	3	5	9	0	17
	Other Sydney	11	14	6	0	31
	Balance of NSW	0	8	3	0	11
	Balance of Australia	0	8	6	0	14
	Overseas in 1996	7	17	0	0	24
	Other/Not Stated	0	0	8	3	11
	Total	41	134	93	3	271

⁸ Auburn, Bankstown, Baulkham Hills, Camden, Campbelltown, Hawkesbury, Holroyd, Liverpool, Parramatta

⁹ Ashfield, Botany Bay, Burwood, Canada Bay, Canterbury, Gosford, Hornsby, Hurstville, Hunters Hill, Kogarah, Ku-ring-gai, Lane Cove, Leichhardt, Manly, Marrickville, Mosman, North Sydney, Pittwater, Randwick, Rockdale, Ryde, South Sydney, Strathfield, Sutherland, Sydney, Waverley, Warringah, Willoughby, Woollahra, Wollondilly, Wyong

¹⁰ Includes persons immigrating to Australia as well as Australian born residents returning from overseas

Table 4.6: The previous residential location of individuals who moved into multi-unit dwellings in Penrith between 1996 and 2001 by tenure (%)

	Previous Location	Owned/Being Purchased	Privately Rented	Other Tenure Type	Tenure Type Not Stated	Total
Semi-detached Dwellings	Penrith	51.4%	48.5%	49.0%	36.9%	49.0%
	Blue Mountains	6.4%	4.3%	3.0%	0.0%	4.4%
	Blacktown	5.3%	8.6%	13.3%	9.2%	8.7%
	Fairfield	2.7%	1.2%	1.2%	0.0%	1.5%
	Other Western Sydney	10.4%	6.0%	9.0%	0.0%	7.2%
	Other Sydney	11.8%	5.9%	7.5%	4.6%	7.2%
	Balance of NSW	4.5%	8.7%	7.5%	9.2%	7.7%
	Balance of Australia	3.6%	5.7%	2.6%	0.0%	4.8%
	Overseas in 1996	3.9%	10.8%	2.1%	13.8%	8.2%
	Other/Not Stated	0.0%	0.3%	4.9%	26.2%	1.2%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%
Flats in a block of less than 4 storeys	Penrith	41.3%	38.1%	55.4%	47.4%	41.1%
	Blue Mountains	6.9%	4.6%	5.5%	6.6%	5.2%
	Blacktown	7.8%	11.0%	7.6%	25.0%	10.3%
	Fairfield	1.7%	0.9%	0.7%	0.0%	1.0%
	Other Western Sydney	9.2%	8.6%	8.6%	0.0%	8.5%
	Other Sydney	13.1%	7.0%	7.2%	14.5%	8.3%
	Balance of NSW	4.8%	8.4%	8.8%	0.0%	7.6%
	Balance of Australia	3.3%	6.1%	2.1%	6.6%	5.1%
	Overseas in 1996	10.1%	15.3%	1.7%	0.0%	12.3%
	Other/Not Stated	1.7%	0.0%	2.4%	0.0%	0.6%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%
Flats in a block of 4 or more storeys	Penrith	34.1%	47.0%	52.7%	0.0%	46.5%
	Blue Mountains	14.6%	6.0%	3.2%	0.0%	6.3%
	Blacktown	0.0%	8.2%	6.5%	0.0%	6.3%
	Fairfield	0.0%	0.0%	3.2%	0.0%	1.1%
	Other Western Sydney	7.3%	3.7%	9.7%	0.0%	6.3%
	Other Sydney	26.8%	10.4%	6.5%	0.0%	11.4%
	Balance of NSW	0.0%	6.0%	3.2%	0.0%	4.1%
	Balance of Australia	0.0%	6.0%	6.5%	0.0%	5.2%
	Overseas in 1996	17.1%	12.7%	0.0%	0.0%	8.9%
	Other/Not Stated	0.0%	0.0%	8.6%	100.0%	4.1%
	Total	100.0%	100.0%	100.0%	100.0%	100.0%

2.9 SOCIO-ECONOMIC PROFILE OF PERSONS WHO MOVED INTO A MULTI-UNIT DWELLING IN PENRITH BY PREVIOUS LOCALITY

Section 4.3 above examined the socio-economic profile of persons who moved into a multi-unit dwelling in Penrith between 1996 and 2001. This section analyses the socio-economic character of these in-movers by the place of origin by their dwelling type in 2001. The analysis adds further detail to the description of the migration streams outlined above. Again, the analysis takes the form of a review of a selected range of census variables to provide a broad overview of the characteristics of household and individuals concerned. Given the relatively small numbers of households moving into high rise flats, the detailed analysis for this group is not presented here.

The data are presented as column percentages in Tables 4.7 and 4.8 for semi-detached houses and flats in blocks of under four storeys. The highlights of these tables are summarised in the text. The 'raw' data for all three dwelling types is set out in Appendix 1 for reference.

Migrants to Semi-detached Dwellings

Household type

The proportion of households who moved from Penrith and Blacktown into semi-detached dwellings and were single parent families was relatively high at around 30%, while half (49%) of those who moved from overseas into a semi-detached dwelling were couples with children. There was also a large proportion of couples with children from Fairfield. High proportions of lone person households who moved into a semi-detached dwelling re-located from Blue Mountains and 'other Western Sydney'. These two areas also had high proportions of couples without children who moved into a semi-detached dwelling between 1996 and 2001.

Income

Those who moved into a semi-detached dwelling from Blue Mountains, 'other Western Sydney' and 'other Sydney' had significant proportions of households earning less than \$400 per week. Blacktown, Fairfield and 'other western Sydney' had a high proportion of households who earned \$800-\$999 per week. Those households who moved from areas outside Sydney (but within Australia) tended to have higher incomes than other in-movers.

Age

Significant proportions of persons aged under 34 years moved into a semi-detached dwelling in Penrith from Penrith, 'other Western Sydney', 'other Sydney' and rural and regional areas. Higher proportions of persons aged over 65 were recorded from Fairfield and 'other Sydney', while Blue Mountains recorded very low levels of in-movers aged 0-14 years.

Country of Birth

Over three-quarters of persons who moved into a semi-detached dwelling in Penrith were Australian born residents. The main exceptions are those from Fairfield (less than half of whom were Australian born), 'other Sydney' and overseas. A significant proportion of persons from Fairfield were born in the Middle East and South and Eastern Europe, with a sizeable proportion from South and Central America. Those who moved from 'other Sydney' were predominantly Australian (65%) although large proportions were from Asia (12%). Of those who migrated from overseas, 30% were from other Oceania countries, 35% from Asia and 9% from north and west Europe.

Employment status

Only 3% of persons from the Blue Mountains who moved into a semi-detached dwelling between 1996 and 2001 in Penrith were unemployed. This compares with an average of 6% across all areas. Over 9% of persons from Fairfield, 'other Western Sydney' and overseas were unemployed. However, 30% of persons from Fairfield and 32% from 'other Sydney' were not in the workforce.

Education

Interestingly, 4% of persons who moved from overseas into a semi-detached dwelling between 1996 and 2001 had a postgraduate degree, twice that of any other area. Some 20% of those from overseas also had a Bachelor Degree while only 4% from Fairfield and 5% from Blacktown had a Bachelor Degree. Although larger proportions of persons who moved from Blue Mountains and Fairfield held Certificate level education.

Occupation

Lower proportions of Managers, Administrators and Professional workers moved from within Penrith and Blacktown compared to other areas. In contrast, some 27% of person who moved from the Blue Mountains into a semi-detached dwelling were Managers, Administrators or Professionals. A significant proportion of Associate Professionals moved from areas outside NSW. There was a significant proportion of Tradespersons who moved from Fairfield into semi-detached dwellings. Further, there were larger proportions of Labourers and Related workers who moved from Blacktown, Penrith and Fairfield.

Rents

For those households who moved into a semi-detached dwelling between 1996 and 2001, the majority were paying between \$150 and \$250 per week. However, there was a significant proportion of those who moved from Fairfield that were paying \$200-\$249 per week (65%) compared to the average of 45%. Some 14% of households who moved from Blacktown paid \$50-\$74, which is more than twice the average. Further, 2% of persons from overseas pay more than \$500 per week in rent, over the three times the average.

Migrants to flats in a block of less than 4 storeys

Household type

Of those who moved 1996 and 2001 to a flat in a low rise block, 32% were in lone person households, 19% in single parent households, 18% in couples without children households and 16% in couples with children households. Migrants from within Penrith, Fairfield, the Blue Mountains and other parts of NSW (outside of Sydney) had higher than average proportions of lone person households (37%, 37%, 37% and 43% respectively). The Blue Mountains also had high proportions of couples without children (23%), while half of those migrating from overseas were couples with children. Approximately one in four persons who migrated from Fairfield and Blacktown were from single parent families (25% and 26% respectively). High proportions of group household migration came from areas outside of Sydney within NSW (20%) and areas within Australia outside NSW (15%).

Income

The most notable trend with regards to those that moved into low rise flats in Penrith, was the proportion of low income households who moved from Fairfield. While the overall proportion of those with a household income of \$399 or less was 26%, almost 60% of those that migrated from Fairfield fell within this income bracket. A further 23% of those from Fairfield were in a household with a weekly income of \$600-\$699. Also to be noted was the relatively high percentage of high income earners in the \$1,000-\$1,999 income bracket that migrated from areas in NSW outside of Sydney.

Age

Of the movers into low rise flats from the Blue Mountains, 38% of them were aged between 15 and 24 years and 22% were aged over 65 years. Fairfield had a high proportion of older persons migrating to Penrith, with 46% of persons aged over 55 years migrating compared to the average of 19%. A high percentage (40%) of young persons aged between 15 and 24 years also migrated from areas outside of Sydney within NSW. This may reflect the location of the University of Western Sydney in the area.

Country of birth

The overall proportion of Australian born persons who migrated to Penrith between 1996 and 2001, to reside in a flat in a block less than 4 storeys, was 63%. In-movers from Fairfield were the most likely to have been born overseas, with only 51% being born in Australia. Of the remaining people who migrated from Fairfield to a flat in a block of less than 4 storeys in Penrith, the most likely birthplace was Southern or Eastern Europe (20%), whilst other regions that were over-represented were those in the Middle East (9%) and South and Central America (9%). Persons born in Asia were over-represented among those that migrated from other parts of Sydney (17%) and were particularly over-represented among immigrants those that migrated from overseas, of whom 50% were born in Asia. A further 17% of those overseas immigrants moving into this type of dwelling in Penrith were born in Oceania and 10% were born in Southern and Eastern European countries.

Employment status

Movers into low rise flats from Blacktown were the most likely to be employed (53%), while those moving from Fairfield were the most likely to not be in the labour

force (46%), with just under one third being employed (31%). With regards to unemployed n-migrants, there was a slight over-representation of unemployed persons amongst those that had moved from overseas between 1996 and 2001.

Qualifications

Just under one third (31%) of persons who migrated to Penrith between 1996 and 2001 to reside in a low rise flat had a post-school qualification. The most likely persons to have any type of post-school qualifications were those who migrated from overseas between 1996 and 2001 to reside in Penrith. Of these, 7% had a post-graduate degree, 17% had a bachelor degree and 9% had an advanced diploma or diploma. The highest level of post-school qualification held by anyone that migrated from Fairfield to Penrith to reside in this particular dwelling type was a certificate (19%).

Occupation

Almost one in four persons who moved to Penrith and now living in a flat in a block of less than 4 storeys held an intermediate clerical, sales or services position, making this the most likely occupation for migrants. For those that migrated specifically from Fairfield however, the most likely occupation was a professional, with 46% of persons being professions, compared to the average of only 12%. Elementary clerical, sales and services workers and labourers and related workers were also prominent occupations for those who migrated from Fairfield (27% and 27% respectively). Labourers and related workers were also over-represented in those persons who migrated from overseas between 1996 and 2001, representing 19% of this group. Of those that migrated from Blacktown to reside in a flat within a block less than 4 storeys high, 8% were managers and administrators. Furthermore, 1 in 5 persons were elementary clerical, sales and services workers.

Rent

The average rent paid by households moving into a flat in a block less than 4 storeys was between \$125 and \$174, with 34% paying between \$125 and \$149 and 21% paying between \$150 and \$174. Those moving from overseas were more likely to pay a weekly rent amount that fell into these two brackets (44% and 25% respectively). A fifth (21%) of those who moved from Fairfield were paying between \$200 and \$224 in rent per week compared to an average of 8% for this rent bracket. However, households moving from Fairfield were also over-represented in the \$50 to \$74 rent bracket (clearly subsidised public housing rents), with 11% paying this amount of weekly rent compared to an average of only 4%. Those moving from other areas in Sydney and other parts of NSW outside of Sydney were more likely than others to pay less than \$100 per week (19% and 13% respectively).

Table 4.7: The previous residential location of individuals who moved into semi-detached dwellings in Penrith between 1996 and 2001 by their socio-economic characteristics (%)

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Household Type											
Couple family with children	24.5%	14.9%	27.5%	39.7%	23.0%	19.3%	23.0%	30.6%	49.3%	0.0%	26.0%
Couple without children	17.7%	24.3%	12.4%	23.1%	24.8%	22.7%	16.7%	20.6%	21.0%	0.0%	18.7%
Single Parent family	32.7%	24.3%	36.4%	23.1%	23.8%	25.1%	22.8%	21.0%	14.5%	0.0%	28.2%
Lone Person Household	14.9%	23.4%	14.2%	7.7%	21.4%	18.3%	14.5%	11.9%	3.9%	0.0%	14.7%
Group Household	7.3%	11.1%	7.8%	3.8%	7.0%	7.8%	21.3%	12.3%	6.5%	0.0%	8.7%
Other	2.8%	2.1%	1.7%	2.6%	0.0%	6.8%	1.7%	3.6%	4.8%	100.0%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Household Income											
Less than \$200	3.2%	5.1%	5.4%	0.0%	3.1%	5.5%	4.7%	3.6%	3.9%	0.0%	3.8%
\$200-\$299	5.2%	8.1%	7.0%	0.0%	4.4%	5.7%	3.4%	1.2%	3.9%	0.0%	4.9%
\$300-\$399	7.8%	6.8%	13.1%	12.8%	9.7%	11.0%	8.8%	7.1%	5.5%	0.0%	8.4%
\$400-\$499	6.9%	5.5%	9.6%	0.0%	9.9%	6.5%	8.3%	6.3%	5.5%	0.0%	7.1%
\$500-\$599	7.0%	3.8%	4.8%	5.1%	5.2%	8.1%	7.8%	7.9%	4.8%	0.0%	6.4%
\$600-\$699	7.7%	14.0%	7.0%	10.3%	6.3%	8.6%	4.7%	9.9%	3.5%	0.0%	7.3%
\$700-\$799	6.9%	8.1%	6.3%	10.3%	3.9%	4.7%	6.9%	5.6%	6.7%	0.0%	6.4%
\$800-\$999	12.2%	8.1%	14.2%	21.8%	16.2%	7.3%	12.0%	6.3%	9.7%	0.0%	11.6%
\$1,000-\$1,199	9.4%	11.1%	10.9%	11.5%	13.1%	6.3%	7.4%	3.6%	10.1%	0.0%	9.2%
\$1,200-\$1,499	11.8%	10.6%	9.2%	3.8%	11.0%	12.0%	8.1%	10.3%	7.6%	0.0%	10.5%
\$1,500-\$1,999	10.4%	12.8%	5.9%	10.3%	13.3%	12.3%	14.5%	16.7%	18.2%	0.0%	11.6%
\$2,000 or more	4.7%	3.4%	1.3%	0.0%	3.9%	4.2%	5.4%	7.9%	3.2%	0.0%	4.2%
Not Stated	6.8%	2.6%	5.4%	14.1%	0.0%	7.8%	8.1%	13.5%	17.3%	100.0%	8.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Age											
0-14	15.5%	7.7%	17.9%	15.4%	10.7%	10.2%	10.0%	14.7%	18.0%	0.0%	14.2%
15-24	24.5%	27.7%	25.1%	17.9%	20.1%	20.6%	39.5%	22.6%	18.7%	0.0%	24.3%
25-34	25.9%	24.3%	29.6%	26.9%	33.2%	31.6%	21.6%	31.3%	32.7%	0.0%	27.3%
35-44	12.2%	12.3%	12.2%	15.4%	12.3%	10.2%	13.5%	16.3%	16.8%	0.0%	12.6%
45-54	11.1%	14.0%	7.6%	3.8%	10.2%	8.6%	7.8%	6.3%	8.5%	0.0%	9.7%
55-64	4.9%	5.1%	2.0%	7.7%	5.5%	3.9%	3.7%	2.8%	2.3%	0.0%	4.2%
65 and over	5.9%	8.9%	5.7%	12.8%	8.1%	14.9%	3.9%	6.0%	3.0%	0.0%	6.4%
Not Stated	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	1.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Birthplace											
Australia	77.2%	84.3%	77.3%	44.9%	80.7%	65.3%	88.0%	76.2%	7.4%	0.0%	70.6%
Oceania	2.4%	2.6%	4.4%	3.8%	4.2%	6.5%	2.2%	3.2%	29.5%	0.0%	5.3%
North-West Europe	9.6%	10.6%	5.4%	6.4%	6.8%	6.5%	2.7%	5.6%	9.0%	0.0%	7.9%
Southern and Eastern Europe	2.3%	1.3%	4.6%	10.3%	0.8%	3.1%	1.7%	1.2%	4.8%	0.0%	2.6%
North Africa	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.4%
Middle East	0.5%	0.0%	1.7%	19.2%	0.0%	1.6%	0.0%	1.2%	5.5%	0.0%	1.3%
Asia	3.7%	1.3%	5.4%	6.4%	7.6%	11.5%	0.7%	6.7%	34.3%	0.0%	7.0%
Northern America	0.1%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	1.2%	2.3%	0.0%	0.4%
South and Central America	1.3%	0.0%	0.0%	5.1%	0.0%	2.3%	0.0%	0.0%	1.4%	0.0%	1.0%
Other Africa	0.5%	0.0%	1.1%	3.8%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.6%
Not Stated	1.9%	0.0%	0.0%	0.0%	0.0%	2.3%	4.7%	4.8%	0.7%	100.0%	3.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Labour Force											
Employed	55.4%	68.9%	49.0%	47.4%	58.5%	56.4%	55.9%	55.2%	43.5%	0.0%	54.0%
Unemployed	5.7%	3.0%	6.8%	9.0%	9.4%	5.5%	8.3%	6.0%	9.2%	0.0%	6.4%
Not in the labour force	22.5%	23.4%	27.5%	29.5%	28.7%	32.1%	24.8%	22.2%	28.1%	0.0%	24.6%
Not stated	16.4%	4.7%	16.8%	14.1%	3.4%	6.0%	11.0%	16.7%	19.1%	100.0%	15.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Level of Post-School Qualification											
Postgraduate degree	0.8%	0.0%	0.8%	0.0%	0.9%	1.7%	0.0%	1.9%	3.7%	0.0%	1.0%
Graduate Diploma or Graduate Certificate	0.4%	2.8%	1.6%	0.0%	0.9%	3.5%	0.0%	2.8%	2.2%	0.0%	1.1%
Bachelor Degree	5.6%	11.1%	3.7%	4.5%	9.1%	12.8%	9.8%	9.3%	19.9%	0.0%	8.2%
Advanced Diploma and Diploma	4.5%	4.1%	4.5%	9.1%	7.3%	6.1%	5.4%	7.4%	10.1%	0.0%	5.6%
Certificate	18.0%	26.7%	18.3%	27.3%	19.6%	21.5%	18.0%	16.7%	12.4%	0.0%	18.5%
Other/Not Applicable	70.6%	55.3%	71.1%	59.1%	62.3%	54.4%	66.8%	61.9%	51.7%	0.0%	65.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%
Occupation											
Managers and Administrators	4.3%	4.9%	2.7%	0.0%	5.4%	1.4%	1.3%	5.8%	6.9%	0.0%	4.0%
Professionals	11.9%	22.2%	8.9%	24.3%	17.9%	19.4%	13.6%	15.1%	16.9%	0.0%	14.1%
Associate Professionals	11.8%	13.0%	12.0%	8.1%	9.8%	10.2%	12.7%	18.7%	9.0%	0.0%	11.8%
Tradespersons and Related Workers	12.2%	13.6%	7.1%	21.6%	9.8%	10.2%	16.7%	10.8%	10.6%	0.0%	11.8%
Advanced Clerical and Service Workers	3.3%	3.7%	7.6%	0.0%	1.3%	1.4%	2.6%	4.3%	2.6%	0.0%	3.3%
Intermediate Clerical, Sales and Service Workers	24.2%	23.5%	22.2%	16.2%	20.1%	19.0%	17.5%	20.1%	19.6%	0.0%	22.1%
Intermediate Production and Transport Workers	10.6%	5.6%	13.3%	8.1%	10.3%	9.7%	14.5%	10.8%	14.8%	0.0%	11.0%
Elementary Clerical, Sales and Service Workers	12.0%	11.1%	15.6%	13.5%	11.6%	7.4%	10.5%	8.6%	12.2%	0.0%	11.6%
Labourers and Related Workers	8.5%	2.5%	9.3%	8.1%	4.0%	5.6%	6.1%	2.9%	7.4%	0.0%	7.1%
Not Stated	1.3%	0.0%	1.3%	0.0%	9.8%	15.7%	4.4%	2.9%	0.0%	0.0%	3.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Weekly Rent											
\$0-\$24	0.8%	0.0%	1.5%	0.0%	1.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.7%
\$25-\$49	2.9%	1.7%	0.0%	0.0%	6.6%	3.5%	4.3%	1.4%	0.8%	0.0%	2.7%
\$50-\$74	7.3%	5.7%	13.7%	0.0%	5.6%	5.8%	6.0%	0.0%	0.8%	0.0%	6.5%
\$75-\$99	3.2%	1.7%	5.5%	0.0%	2.1%	5.0%	3.7%	2.3%	3.1%	0.0%	3.4%
\$100-\$124	3.3%	5.1%	5.2%	6.7%	2.8%	8.9%	3.7%	9.8%	3.1%	0.0%	4.3%
\$125-\$149	4.4%	3.4%	3.2%	11.1%	6.9%	1.2%	3.4%	5.1%	3.4%	0.0%	4.1%
\$150-\$174	7.2%	8.6%	11.7%	0.0%	8.0%	12.7%	4.6%	1.4%	10.2%	0.0%	7.8%
\$175-\$199	20.6%	12.6%	16.5%	11.1%	17.0%	14.7%	15.1%	20.0%	23.7%	0.0%	18.9%
\$200-\$224	33.6%	36.0%	26.2%	48.9%	32.6%	31.3%	35.3%	38.6%	33.9%	0.0%	33.4%
\$225-\$249	11.0%	19.4%	9.2%	15.6%	8.3%	8.9%	14.5%	11.6%	14.3%	0.0%	11.6%
\$250-\$274	2.0%	2.3%	2.2%	0.0%	3.8%	3.9%	2.8%	4.2%	2.1%	0.0%	2.5%
\$275-\$299	0.5%	0.0%	0.0%	0.0%	0.0%	1.2%	1.4%	0.0%	1.3%	0.0%	0.6%
\$300-\$399	0.5%	0.0%	0.7%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
\$400-\$499	0.4%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
\$500 and over	0.4%	0.0%	0.7%	0.0%	1.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.5%
Not stated	1.6%	3.4%	3.5%	6.7%	2.1%	3.1%	4.3%	5.6%	1.6%	0.0%	2.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%

Table 4.8: The previous residential location of individuals who moved into flats in a block of less than 4 storeys in Penrith between 1996 and 2001 by their socio-economic characteristics (%)

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Household Type											
Couple family with children	10.7%	6.3%	13.3%	17.1%	16.4%	11.3%	9.4%	16.9%	50.1%	0.0%	16.3%
Couple without children	16.6%	22.9%	18.2%	20.0%	19.5%	20.2%	14.8%	18.0%	20.5%	0.0%	18.0%
Single Parent family	21.0%	9.1%	25.4%	25.7%	19.2%	17.7%	16.0%	20.9%	9.4%	0.0%	18.5%
Lone Person Household	37.3%	43.4%	31.4%	37.1%	32.8%	33.3%	37.1%	27.3%	8.0%	0.0%	31.9%
Group Household	9.1%	10.9%	10.1%	0.0%	8.0%	12.8%	19.9%	15.1%	11.1%	0.0%	10.7%
Other	5.3%	7.4%	1.7%	0.0%	4.2%	4.6%	2.7%	1.7%	1.0%	100.0%	4.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Household Income											
Less than \$200	5.3%	3.4%	6.1%	17.1%	9.4%	7.4%	6.6%	7.0%	4.8%	0.0%	6.0%
\$200-\$299	12.1%	16.0%	9.5%	17.1%	11.5%	7.4%	12.5%	9.9%	4.1%	0.0%	10.5%
\$300-\$399	10.2%	9.1%	10.4%	25.7%	10.8%	13.8%	11.3%	18.6%	8.9%	0.0%	11.0%
\$400-\$499	10.7%	12.0%	11.0%	0.0%	12.2%	5.3%	8.2%	8.1%	9.4%	0.0%	9.8%
\$500-\$599	8.4%	7.4%	8.6%	0.0%	4.5%	8.5%	5.9%	0.0%	9.2%	0.0%	7.4%
\$600-\$699	8.6%	6.3%	8.6%	22.9%	8.0%	9.9%	5.9%	6.4%	12.3%	0.0%	8.8%
\$700-\$799	6.0%	7.4%	8.4%	0.0%	10.5%	10.6%	7.4%	9.9%	4.8%	0.0%	7.1%
\$800-\$999	9.7%	9.1%	12.7%	8.6%	12.9%	6.4%	12.9%	9.3%	11.1%	0.0%	10.3%
\$1,000-\$1,199	6.3%	9.7%	7.5%	8.6%	3.8%	7.1%	14.1%	5.2%	8.7%	0.0%	7.3%
\$1,200-\$1,499	7.3%	4.6%	6.3%	0.0%	7.0%	1.1%	7.4%	6.4%	8.4%	0.0%	6.5%
\$1,500-\$1,999	5.3%	2.3%	5.5%	0.0%	3.1%	4.3%	2.3%	5.8%	4.1%	0.0%	4.5%
\$2,000 or more	2.5%	3.4%	0.9%	0.0%	3.1%	0.0%	2.3%	2.9%	1.4%	0.0%	2.1%
Not Stated	7.4%	9.1%	4.6%	0.0%	3.1%	18.1%	3.1%	10.5%	12.8%	100.0%	8.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Age											
0-14	5.8%	2.9%	6.6%	11.4%	7.0%	7.4%	5.1%	9.9%	10.1%	0.0%	6.7%
15-24	26.2%	38.3%	29.4%	14.3%	24.4%	20.2%	40.2%	27.9%	24.3%	0.0%	27.1%
25-34	22.4%	17.1%	26.5%	11.4%	27.2%	24.1%	18.8%	25.0%	31.3%	0.0%	23.8%
35-44	12.6%	8.0%	13.0%	8.6%	9.8%	12.4%	9.4%	15.1%	19.5%	0.0%	12.8%
45-54	11.2%	8.0%	11.2%	8.6%	9.4%	9.9%	9.0%	10.5%	7.5%	0.0%	10.0%
55-64	7.6%	3.4%	6.6%	17.1%	6.6%	10.6%	7.0%	5.8%	2.9%	0.0%	6.8%
65 and over	14.3%	22.3%	6.6%	28.6%	15.7%	15.2%	10.5%	5.8%	4.3%	0.0%	12.2%
Not Stated	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Birthplace											
Australia	70.9%	78.9%	70.6%	51.4%	68.6%	62.4%	84.4%	75.6%	5.3%	0.0%	62.9%
Oceania	3.7%	3.4%	6.1%	0.0%	2.4%	2.1%	3.1%	4.7%	16.6%	0.0%	5.2%
North-West Europe	11.2%	9.1%	7.5%	8.6%	4.2%	8.5%	5.9%	4.1%	4.1%	0.0%	8.1%
Southern and Eastern Europe	3.5%	0.0%	7.2%	20.0%	5.9%	5.3%	0.0%	4.1%	10.1%	0.0%	4.8%
North Africa	0.3%	0.0%	0.9%	0.0%	1.0%	0.0%	0.0%	1.7%	1.0%	0.0%	0.5%
Middle East	1.1%	0.0%	0.9%	8.6%	1.0%	2.1%	1.2%	3.5%	5.3%	0.0%	1.8%
Asia	4.7%	0.0%	2.6%	0.0%	6.6%	16.3%	4.3%	1.7%	49.9%	0.0%	10.7%
Northern America	0.0%	0.0%	0.9%	0.0%	1.0%	1.1%	0.0%	0.0%	2.7%	0.0%	0.6%
South and Central America	0.8%	0.0%	0.9%	8.6%	1.0%	1.1%	0.0%	1.7%	2.9%	0.0%	1.1%
Other Africa	0.3%	0.0%	0.9%	0.0%	0.0%	1.1%	1.2%	0.0%	2.2%	0.0%	0.7%
Not Stated	3.7%	8.6%	1.7%	2.9%	8.0%	0.0%	0.0%	2.9%	0.0%	100.0%	3.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Labour Force											
Employed	50.8%	48.6%	53.0%	31.4%	49.8%	42.9%	54.7%	47.1%	43.4%	0.0%	48.8%
Unemployed	8.6%	6.3%	9.8%	0.0%	4.5%	8.5%	10.9%	9.9%	13.5%	0.0%	8.9%
Not in the labour force	33.6%	37.1%	29.1%	45.7%	36.2%	31.2%	30.5%	26.2%	34.5%	0.0%	32.7%
Not stated	7.1%	8.0%	8.1%	22.9%	9.4%	17.4%	3.9%	16.9%	8.7%	100.0%	9.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Level of Post-School Qualification											
Postgraduate degree	0.5%	1.8%	0.9%	0.0%	0.0%	4.6%	1.2%	0.0%	7.2%	0.0%	1.8%
Graduate Diploma or Graduate Certificate	0.4%	1.8%	1.9%	0.0%	0.0%	1.1%	0.0%	0.0%	0.8%	0.0%	0.6%
Bachelor Degree	4.7%	11.2%	5.6%	0.0%	10.1%	11.5%	8.2%	3.9%	17.2%	0.0%	7.8%
Advanced Diploma and Diploma	4.0%	7.6%	2.2%	0.0%	4.5%	4.6%	5.3%	7.7%	9.1%	0.0%	4.9%
Certificate	16.6%	19.4%	20.4%	19.4%	15.7%	16.1%	14.4%	16.8%	9.9%	0.0%	16.1%
Other/Not Applicable	73.9%	58.2%	69.1%	80.6%	69.7%	62.1%	70.8%	71.6%	55.8%	0.0%	68.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%
Occupation											
Managers and Administrators	2.0%	8.2%	1.6%	0.0%	2.1%	0.0%	5.0%	3.7%	3.3%	0.0%	2.6%
Professionals	10.1%	15.3%	5.4%	45.5%	15.4%	19.8%	13.6%	16.0%	10.0%	0.0%	11.8%
Associate Professionals	8.9%	12.9%	8.7%	0.0%	11.2%	12.4%	10.0%	11.1%	9.4%	0.0%	9.8%
Tradespersons and Related Workers	12.6%	7.1%	16.8%	0.0%	11.9%	12.4%	13.6%	8.6%	13.3%	0.0%	12.6%
Advanced Clerical and Service Workers	3.3%	3.5%	3.8%	0.0%	0.0%	0.0%	0.0%	3.7%	1.7%	0.0%	2.4%
Intermediate Clerical, Sales and Service Workers	25.0%	25.9%	25.0%	0.0%	15.4%	25.6%	23.6%	19.8%	16.1%	0.0%	22.7%
Intermediate Production and Transport Workers	12.5%	0.0%	13.6%	0.0%	9.8%	5.0%	7.1%	14.8%	13.9%	0.0%	10.9%
Elementary Clerical, Sales and Service Workers	13.8%	20.0%	12.0%	27.3%	11.9%	17.4%	15.0%	11.1%	12.8%	0.0%	13.9%
Labourers and Related Workers	11.5%	4.7%	13.0%	27.3%	9.1%	7.4%	9.3%	8.6%	19.4%	0.0%	11.5%
Not Stated	0.4%	2.4%	0.0%	0.0%	13.3%	0.0%	2.9%	2.5%	0.0%	0.0%	1.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Weekly Rent											
\$0-\$24	0.8%	0.0%	1.1%	0.0%	0.0%	0.0%	3.6%	2.0%	0.8%	0.0%	1.0%
\$25-\$49	7.6%	5.4%	3.9%	0.0%	1.5%	7.9%	6.7%	2.7%	0.8%	0.0%	5.3%
\$50-\$74	4.6%	2.7%	3.6%	10.7%	6.0%	6.3%	4.0%	2.0%	1.4%	0.0%	4.1%
\$75-\$99	2.1%	3.6%	2.5%	0.0%	3.0%	4.7%	2.7%	2.0%	0.0%	0.0%	2.2%
\$100-\$124	6.4%	5.4%	10.0%	10.7%	9.5%	9.4%	8.9%	8.2%	7.3%	0.0%	7.7%
\$125-\$149	29.5%	32.4%	35.9%	35.7%	35.5%	36.1%	33.5%	35.4%	43.6%	0.0%	34.0%
\$150-\$174	22.5%	26.1%	18.5%	0.0%	23.0%	10.5%	20.5%	19.0%	25.4%	0.0%	21.2%
\$175-\$199	7.3%	6.3%	7.1%	10.7%	9.0%	7.9%	4.0%	7.5%	3.9%	0.0%	6.7%
\$200-\$224	7.8%	7.2%	10.0%	21.4%	9.5%	7.9%	8.0%	6.8%	8.4%	0.0%	8.4%
\$225-\$249	5.4%	4.5%	1.1%	0.0%	3.0%	3.1%	2.7%	12.2%	1.7%	0.0%	4.1%
\$250-\$274	1.3%	0.0%	0.0%	0.0%	0.0%	3.1%	1.3%	0.0%	0.8%	0.0%	1.0%
\$275-\$299	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.8%	0.0%	0.3%
\$300-\$399	0.5%	3.6%	0.0%	0.0%	0.0%	0.0%	1.3%	2.0%	1.1%	0.0%	0.7%
\$400-\$499	0.3%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
\$500 and over	1.9%	0.0%	2.1%	0.0%	0.0%	1.6%	1.3%	0.0%	0.0%	0.0%	1.2%
Not stated	1.7%	2.7%	2.1%	10.7%	0.0%	1.6%	0.0%	0.0%	3.9%	0.0%	1.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%

2.10 PART 2: SUMMARY AND CONCLUSIONS

Introduction

Some of the key findings of the research have been commented on in the preceding sections. Here, it is appropriate to return to the initial questions posed in the research brief and outlined in the introduction to the report and provide some answers. The first of these was addressed in Part 1 of the report. These conclusions therefore focus on the remaining three questions.

- 1. What will be the emerging role of our “middle aged” and older housing areas (for example, South Penrith and Oxley Park) and what are the social and economic consequences of alternative housing policies for these areas?**
- 2. What will happen to our older established residential areas in terms of continuing loss of population if there is no urban renewal stimulated by infill housing opportunities?**
- 3. As the stock of dwellings within multi-unit housing continues to be developed, there will be a trend for a proportion of that housing to be used increasingly for rental accommodation. What will be the social consequences of this trend and how should it be best managed?**

Rather than answer these questions separately, the remainder of this summary discusses these and related issues together, offering some ideas for how the growth of a high density sector and the renewal of older suburbs might be better managed.

The current role of the older suburbs

We have sought to establish the likely impacts of renewal in these older suburbs, specifically South Penrith and Oxley Park, by modelling the social and urban design outcomes of current patterns of renewal in these areas. The process of change and adaptation reflects the age of these suburbs, and in particular the way they are moving towards the end of their initial life cycle as the original population ages and is being replaced by a more diverse community and where the housing stock is being replaced or restructured into new, and again, more diverse forms of housing. It is in these communities that the new wave of urban renewal is taking place. While this has been going on for some time, assisted by the current zoning framework in some places, it is now gathering pace. Under the proposals canvassed as part of the new Sydney Metropolitan Strategy, it is these suburbs that will be targeted for an unprecedented increase in densities. It is therefore crucial Council is in a position to both understand what is happening here and also to develop appropriate policies to best manage the pressure for redevelopment.

As we pointed out in the earlier *Penrith Urban Growth Management Report*, these suburbs provide housing for an increasingly diverse community through a number of housing sub-markets. The first is an older mature population, some of whom have been resident here for many years, most of whom own their properties outright. Some have no doubt lived in these suburbs since they were first constructed in the inter- and

immediate post war period. The fact that there were relatively few children in this type of suburb reflects the aging nature of the population. Older children moving to their own homes are more likely to move to other suburbs to have their families or to other locations to pursue employment or educational opportunities elsewhere. There is, therefore, an emerging cohort of *in situ* 'empty nesters'.

A second market is the lower cost rental market. Up to a third of the housing is rented from a private landlord, a high proportion compared to elsewhere in Penrith. This market provides an affordable housing option for those either too poor to buy or households in the early stages of their life cycle. While the higher than average proportions of single persons, couple households and low income households in these areas is no doubt a reflection of the older population noted above, it is also an outcome of the attraction of the rental housing here to younger adults. This is an important market for many in Penrith and much of this market is to be found in the walk-up blocks of flats that have been built on redevelopment sites in these suburbs. Nevertheless, there is substantial rental house sector as well, which maybe associated with the poorer quality housing stock.

A third market focuses on affordable houses for lower to moderate income home buyers. Penrith is one of the more affordable housing markets in Sydney, and this stock provides opportunities for those excluded on price grounds from other areas, both within Penrith and beyond, to afford home ownership. This appears to be in part associated with the new medium density villa/town house market. However, the proportion in this category remains relatively low at present.

These areas therefore provide a range of diverse housing opportunities for a diverse community, which differentiates it from the newer, more family orientated suburbs. This, in itself, is a positive feature and suggests more balanced community outcomes. However, the fact that families, while by no means missing from these areas, form a below average proportion of the housing market, indicates that the housing market in these older suburbs may be becoming rather polarised, between the 'remnant' original population, now in retirement, and the more newly arrived, and probably more mobile, younger population.

The future of the older suburbs without infill renewal

As they stand, *without further infill renewal*, the most likely scenario for the older suburbs will be a gradual process of revaluation and 'in situ' renewal as the ageing housing stock is replaced by 'knock down' redevelopment of larger single houses built mainly for individual families. It is possible that the larger blocks of land available in these areas would prove very attractive to higher income families looking for both space and higher quality street scapes than are currently being produced in new urban development at much higher densities on the urban fringe. Certainly, there is a potential for revitalising these areas for middle and even higher income housing through in-situ replacement where plots are suitable for households who put a premium on space and external amenity. The maturity of these suburbs would also help this process. An outcome, perhaps the suburban equivalent to inner city gentrification, might well be possible, so long as new high density infill development is controlled, which would act as a deterrent for such households.

This option is one that Council should explore. Faced with a polarising city structure, encouraging medium to high income established home owners (of the kind currently moving to the new urban fringe) to return to the older suburbs through controlling uncoordinated higher density infill might be a viable alternative to higher density renewal. It would help redress the spatial divide growing across the city and encourage further economic growth in these areas in the provision services for a higher income population.

Just as importantly, Council must now consider what the impacts on Penrith's population will be of the development of the major new urban release areas in Bringelly and Riverstone. If successful, these areas will progressively attract medium and higher income households from across Western Sydney to migrate there over the next thirty years, in much the same way as the new suburbs being currently developed are doing. As a consequence, much of the demand for Penrith's new higher density housing may be deflected to these new growth centres. The re-casting of Penrith's older and more spacious suburbs for this population might be a way of countering this inevitable process and retain economic growth in suburbs that at present are slowly declining in social status.

The likely future role of the older suburbs with higher density renewal

Modelling change in housing markets is a speculative exercise at best. Nevertheless, the projections of the social outcomes of current trends in redevelopment and renewal, as determined by the prevailing zoning framework for these older areas, indicates the kind of change that can be expected, if nothing intervenes to challenge prevailing market trends.

The most obvious likely impact is that the predicted increase in higher density housing (in the cases study areas reviewed here, dual occupancy and villa/town houses developments) will lead to a community more likely to comprise of private renters and have a high proportion of younger, more mobile households, although the proportion of lone parent households is also predicted to increase substantially. These households will mainly be on medium to low incomes.

The housing market processes that generate this kind of social profile are an outcome of the role of the rental investment market in driving housing development in these areas. In the recent past, much of the new housing produced in redevelopment sites has been bought by investors and therefore ends up in the rental market. The older and relatively cheaper house property is also attractive to investors looking for a cheap way to access capital gains. It should be stressed that this rental market is not comparable to the DINKs and Yuppie rental sectors in downtown Sydney or other waterside locations. The rental community in Penrith is not made up of young more educated 'creative' classes, but represent a cohort of suburban low income households, many of whom may be struggling economically. This reflects the character of Penrith in the regional housing market.

Nevertheless, there is also an active home ownership market and it this component of the market that offers an opportunity for these areas to broaden their social profile, especially if these new home buyers, many of whom will be younger people, remain in the area as they enter the child rearing stage of their life cycle. A proportion of the

sale of higher density housing may also be going to the large number of empty nesters identified as already living in the Penrith.

It is the balance between these two markets that holds the key to the future of these older areas of Penrith under urban renewal pressure. Too much rental, and there is a danger that some of these higher density areas will spiral into places of higher socio-economic disadvantage, especially those parts more distant from good transport and services where values will be lowest. We have seen this happen in other parts of Western Sydney where high density redevelopment has proceeded in an unmanaged and uncoordinated manner, even around transport nodes. A policy of encouraging a higher degree of home ownership in this new high density stock needs to be developed, although this will not be easy given the relative affordability of the low density housing stock in the area. Ensuring high quality urban design and high neighbourhood amenity will be part of this strategy.

However, it has to be stated that where exactly the demand for a larger higher density sector will come from in future years needs to be questioned. If renewal is to be investor driven, then precisely where the numbers of rental households will come from will need to be considered, especially when Penrith will be competing for this population with higher density developments in Blacktown and the Riverstone and Bringelly release areas. The same issue applies if the market is to be more reliant on home buyers to generate development. In addition, recent research from Melbourne¹¹ suggests there is no simple correlation between smaller dwellings and the demand from the predicted growth of smaller households. Many older 'empty nesters' will prefer to remain in their family home. Much of the new higher density stock is only of two bedrooms, too small to provide additional space for visiting family for older people, or additional space for home offices or guest rooms for others. Simply building smaller high density housing does not necessarily mean small households will be there to live in it.

Social outcomes under alternative planning policies

Penrith has been designated a potential 'Regional City' under the proposals being canvassed for the new Sydney Metropolitan Strategy, although it has currently been classified as a 'Major Centre' in its present form. Developing Penrith as a Regional City will involve the development of a substantial higher density residential sector over the next thirty years of a scale not yet experienced in the City. Under these proposals, central Penrith can expect to have clusters of high density residential buildings of up to 20 storeys with an average of 4 storeys in areas immediately surrounding the centre. Elsewhere, there will be a series of higher density Town Centres situated around the rail stations, presumably on the line towards Sydney, each accommodating approximately 4,000 dwellings in high density developments of up to 6 storeys. Elsewhere, a range of Villages and smaller Neighbourhood centres with a mix of 4 story walk-up flats, top-shop flats and villa/town house development will be scattered across the urban area.

¹¹ Wulff, M. Healy, E. and Reynolds, M (2004) *Why don't small households live in small dwellings? Disentangling a planning dilemma*, *People and Place*, V12 N 1, pp58 - 71

What would these proposals mean for the residential and social structure of Penrith? There would certainly be a major change in the urban built form of the City, and a major realignment of the housing market towards higher density housing and units. A full scale evaluation of the physical and social impacts of these proposals on Penrith is outside the scope of this project. However, some idea of what might happen, given prevailing market outcomes, can be deduced from the foregoing analysis.

Given prevailing trends, and assuming the full development of the proposals for a much higher density housing market in Penrith, the most obvious impact, on current trends, would be for a substantial increase in the private rental market in the City, with the associated social outcomes that would flow from this: larger numbers of lower income, younger, childless households, perhaps split between older 'empty nesters' as well as more mobile younger people. Lone parent families would also find this form of accommodation attractive due to its affordability. On the other hand, couple families, the 'traditional' Penrith household type, would remain embedded in the low density suburbs. Older households downsizing from the residential suburbs would also be expected to be accommodated in this stock.

Areas designated for Village or Neighbourhood status, where medium density villa and town house redevelopment predominates, would attract a more middle income population, perhaps with greater numbers of young families with children, especially single parent families, but would also be attractive to older households downsizing from house property. Again, the proportion renting would be high, on current market trends. Presumably family centred housing would remain concentrated in the suburbs of low density houses further away from the central high density axis along the rail and main road lines.

The resulting geographical division of Penrith into social zones defined by housing density would be a continuation of the trends already apparent in the City from the analysis presented in the *Penrith Urban Growth Management Report*. However, the proposals would shift the social profile of the City substantially away from its current family orientated profile, given current trends in the market. This would have substantial implications for the provision of services and amenities for the new population in these areas. In effect the social profile of the City would become deeply entrenched with the high density axis contrasting to the low density suburbs beyond, and with it, a similarly entrenched social division.

Is a polarised Penrith City a problem?

Why should it matter if Penrith emerges as a City polarised into high rise core area comprising the young, the single, lone parents and childless mobile renters together with downshifting older people, contrasting to low density suburbs for couple and their children? This is, after all, what is emerging already. There are several arguments that can be put forward that suggests such a scenario would not be beneficial over the long run for the City. Firstly, the demographic polarisation in household type would almost certainly be associated with an economic polarisation, with the higher density core being typified by a lower income population, in per household terms, characterised by lower occupational skills, higher propensity towards unemployment, higher proportions not economically active, and so on. Again, this is driven by the high proportion of rental property in the higher density market, and the

fact that most high density stock accommodates smaller households where single incomes are much more common.

There is already evidence that in some of the areas where walk up flats are concentrated a low income and disadvantaged housing sector is developing, for example, in parts of St Marys and around Werrington station. Unless the nature of the demand for such accommodation changes, there is every reason to believe that at least a proportion of the new high density development will pass rapidly into this more marginalised rental market. While it provide a source of more affordable housing for these high needs groups, the wisdom of allowing concentrations of this type of property to develop further should be questioned. The logical outcome of current and proposed higher density planning policies therefore may well be the creation of concentrations of relative disadvantage in less attractively located or poorly designed high density privately rented enclaves. This needs to be recognised and managed.

Secondly, there is a growing debate about the social sustainability of new development. Again, much rhetoric from State government and the development industry has emerged concerning the need to create balanced and vibrant communities as elements in what might constitute a sustainable community. Building a City split into two increasing polarised groups, defined by the type of property they inhabit, clearly runs counter to such propositions. Balanced communities are by definition diverse communities. Diverse communities, and the necessary precursor, a diverse housing stock, are better able to change to meet future changing circumstances, a critique currently levelled at the 'monocultural' new suburbs in Sydney, for example in Glenmore Park, that have developed comprising almost entirely of large family housing. However, the likely outcomes of the renewal of older suburbs predicted in this report will not necessarily create particularly balanced communities (although they will be certainly more diverse socially than the new low density suburbs).

The segregation of social and age groups spatially by the housing market is also a potential problem in terms of community cohesion. If older people wish to find a smaller home more suited to their needs in later life, they will be forced to move to a new community to do so. In doing so, they leave their establish links and perhaps their children who may be setting up their families in the low density suburbs. Families often rely on grandparents to cover for child care and other support. Building a City split by age will make such mutual support much more difficult. Similarly, if older children wish to leave a suburban home, then the only option will be to move into the higher density housing in a different part of the city, again stretching mutual support links and breaking community ties. Strong and vibrant local communities are not best served by such a policy.

Instead, it could be argued that higher density housing should be encouraged across the urban area, in small and diffused sites, in order to provide a mix of housing opportunities for a range of households. In this way, the social polarisation currently being built into the urban structure, and on current trends more likely under the proposed policies of the Metropolitan Strategy, might be avoided. This does not preclude higher density core areas, but it does mean that a much broader view of where housing density should be increased needs to be developed, but avoiding the poor urban design outcomes associated with earlier forms of dual occupancy or villa and flat development. To an extent, the 'village' and neighbourhood' components of

the Metropolitan Strategy might achieve this. But again, this presupposes nodal concentrations rather than a broader spread of higher density housing. The nodal logic rests on the notion that there is a direct relationship between high density housing and public transport use. However, this assumption has yet to be tested in the Sydney suburban context, and remains a matter of belief, not fact.

What policies might make a difference?

The key question is whether such a polarised scenario would actually develop. Several things might intervene to change the outcomes. First, the whole renewal and densification policy promoted by current Metropolitan Strategy proposals is to be driven solely by market forces. In the relatively lower value Penrith housing market, there must be some doubt as to whether such forces currently exist to drive the process. Moreover, housing markets are subject to considerable fluctuation, with booms followed by slumps the normal pattern. The current slump in investor activity in the Sydney housing market suggests that such changes may take a long time to work their way through the older suburbs, or, indeed, may never fully occur.

Whether the NSW residential investor market will rebound after this current slump, and in what way, remains to be seen. But the main point here is that, as we have argued above, the higher density market is investor driven. If there is a long term withdrawal of investors in the kind of property that will be developed in Penrith, then the planning targets set for the City will not be forthcoming. With so much of new higher density output dependent on investors to ensure the stock is built, this may prove to be a major impediment to achieving these goals.

Moreover, current zoning regulations allow higher density housing across some of the older suburban areas that are some distance from a rail station. Oxley Park provides evidence of a lack of coordinated renewal activity of this kind permitted within broad brush zoning, but with no obvious locational focus on public transport nodes, as envisaged in the Metropolitan Strategy proposals. This suggests that current zoning needs to be substantially reviewed and revised if more targeted and concentrated redevelopment is required.

While the reliance on the market to drive these changes is one area that will add a large degree of uncertainty to the outcomes from renewal, it could be argued that active intervention to avert the possibility of polarisation might also act to change the outcome predicted above. Council should consider how Urban Renewal Master Plans to replace current broad brush residential zoning can be developed for suburbs subject to renewal which would be underpinned by social sustainability principles. Best practice here would suggest these Master Plans would be a joint outcome of Council and community consultation, rather than left to the private sector to determine outcomes which may well override social sustainability concerns.

Importantly, Council will need to take a positive and active lead in this process if the negative aspects of the NIMBY syndrome from the communities involved are not to prevail. A clear vision of the outcomes Council expects from renewal would be a critical component of this process. After all, Council will be faced with managing the long term consequences of this process, so it would be better to be in control of the outcomes, rather than accept what the market delivers.

Poor urban design outcomes are also a current concern. Council may need to become more prescriptive in terms of the acceptable forms of redevelopment that are permitted to ensure the poor quality renewal of recent years is studiously avoided.

Unfortunately, the nature of the development industry will not necessarily assist this process, given the status of the Penrith housing market. Only recently, one of Sydney's most prominent residential developers was reported to have noted that it would be difficult to produce high quality high density buildings in lower value suburban locations. If this is so, then Council will need to be very careful about what kinds of development it allows to take place. Once built, these developments will determine the social outcomes in the suburbs subject to renewal and densification for many decades.

A key issue here is the nature of renewal and land subdivision patterns. Redevelopment on single blocks has resulted in poor urban design outcomes in the past, especially where developers have crammed blocks to achieve the maximum permitted densities. If the mistakes of such development are to be avoided, policies that actively encourage the assembly of several adjacent blocks to enable well designed and diverse housing design outcomes need to be developed.

All these issues imply a higher level of planning intervention and guidance in the market than has been the case hitherto. Current broad brush zoning for higher density, which appears to have been driven as much by the location of larger residential plots across the City than by a policy to actively manage high density housing locations, will need to be reviewed. A more assertive approach to managing renewal will be needed to ensure an appropriate mix of dwelling types with high quality design and providing appropriate housing for a mix of social groups in the most optimum locations is achieved. This will not be easy, given the nature of Penrith's current and likely social mix and housing market. Unless there is a marked upswing in the socio-economic profile of the City in the next thirty years (not impossible, given good economic management), then the expansion of lower value higher density housing developed *on the current model* in Penrith will almost inevitably result in negative social outcomes for many of the areas targeted.

Other issues

Dwelling life cycle and quality

The housing stock in these areas is currently predominantly comprised of single houses, many of which are fibro or weatherboard, but in with a substantial number built in brick. The high proportion of dwellings of weatherboard and fibro construction in Oxley Park and the northern part of South Penrith suggests there maybe issues surrounding the fact that much of this kind of dwelling stock may be nearing the end of it life cycle, particularly in terms of amenity and standard. These properties are the least likely to withstand use for many more years and may well be facing a natural process of replacement. Brick dwellings may be more durable, although again, amenity standards may be increasing inadequate for current needs. These, too, face renewal, but here there would be at least a more solid structure on which conversion, renovation and additions can be built.

The implications of the of life cycle position of these older suburbs in terms of build type and construction is something Council may need to explore further, especially as there may be growing issues of heritage and conservation arising in the next few years, as well as pressure for renewal. This is a relatively new phenomena for Penrith, given the bulk of the stock is still likely to be less than 60 years old.

Having a better understanding of the process of dwelling obsolescence and quality (repairs and building standards) would assist in better planning for the replacement of these dwellings when it happens, rather than letting it take place ‘naturally’ by market forces alone. The latter often works to produce *ad hoc*, uncoordinated changes which may not work to the best interests of the area as a whole and may be incompatible with a Master Planing approach. If the Penrith Residential Strategy does not already address this issue, then Council should consider developing a strategy for identifying stock that is likely to need replacing, assessing the timescales in which this will occur and providing a planning framework for coordinated and managed renewal might be well worth pursuing.

Developing an active spatial information system

The development of a more interventionist planning policy will require an accurate and easily maintained spatial database on residential land uses in renewal areas. Without such a database, monitoring the outcomes of renewal would be extremely difficult. This is not a difficult task. The example of the drive-by land use survey included in this research provides a simple and cost-effective methodology for producing an up-to-date database of the current residential stock and land use. This should be progressively extended to all the older suburbs that are currently the focus of renewal activity. Once established, the residential land use database would be easily updated by adding data from development approvals and completions as they happen. In this way a fully comprehensive and accurate spatial database, linked to the land use cadastre, would be in place to assist in monitoring renewal, assessing social outcomes and informing on-going planning reviews.

This cadastre-based database, if linked to appropriate software, would also allow accurate visual representations to be generated of the kind included in this report to asses the urban design outcomes of any development application, situated in the context of the existing urban form and streetscape. Such an active spatial information system would be an essential component of the more intensive local planning policy suggested above.

Council is therefore recommended to explore the options of progressively developing a spatial residential land use information system of this kind that can be used to monitor renewal activity.

Appendix 2: The previous residential location of individuals who moved into semi-detached dwellings, low rise and high rise flats in Penrith between 1996 and 2001 by their socio-economic characteristics

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Household Type											
Couple family with children	636	35	126	31	88	74	94	77	214	0	1,375
Couple without children	460	57	57	18	95	87	68	52	91	0	990
Single Parent family	847	57	167	18	91	96	93	53	63	0	1,490
Lone Person Household	387	55	65	6	82	70	59	30	17	0	775
Group Household	190	26	36	3	27	30	87	31	28	0	462
Other	72	5	8	2	0	26	7	9	21	65	197
Total	2,592	235	459	78	383	383	408	252	434	65	5,289
Household Income											
Less than \$200	84	12	25	0	12	21	19	9	17	0	199
\$200-\$299	136	19	32	0	17	22	14	3	17	0	260
\$300-\$399	202	16	60	10	37	42	36	18	24	0	445
\$400-\$499	179	13	44	0	38	25	34	16	24	0	373
\$500-\$599	181	9	22	4	20	31	32	20	21	0	340
\$600-\$699	199	33	32	8	24	33	19	25	15	0	388
\$700-\$799	178	19	29	8	15	18	28	14	29	0	338
\$800-\$999	317	19	65	17	62	28	49	16	42	0	615
\$1,000-\$1,199	243	26	50	9	50	24	30	9	44	0	485
\$1,200-\$1,499	306	25	42	3	42	46	33	26	33	0	556
\$1,500-\$1,999	270	30	27	8	51	47	59	42	79	0	613
\$2,000 or more	122	8	6	0	15	16	22	20	14	0	223
Not Stated	175	6	25	11	0	30	33	34	75	65	454
Total	2,592	235	459	78	383	383	408	252	434	65	5,289

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Age											
0-14	402	18	82	12	41	39	41	37	78	0	750
15-24	636	65	115	14	77	79	161	57	81	0	1,285
25-34	671	57	136	21	127	121	88	79	142	0	1,442
35-44	317	29	56	12	47	39	55	41	73	0	669
45-54	287	33	35	3	39	33	32	16	37	0	515
55-64	127	12	9	6	21	15	15	7	10	0	222
65 and over	152	21	26	10	31	57	16	15	13	0	341
Not Stated	0	0	0	0	0	0	0	0	0	65	65
Total	2,592	235	459	78	383	383	408	252	434	65	5,289
Birthplace											
Australia	2,002	198	355	35	309	250	359	192	32	0	3,732
Oceania	63	6	20	3	16	25	9	8	128	0	278
North-West Europe	250	25	25	5	26	25	11	14	39	0	420
Southern and Eastern Europe	60	3	21	8	3	12	7	3	21	0	138
North Africa	8	0	0	0	0	0	0	0	13	0	21
Middle East	13	0	8	15	0	6	0	3	24	0	69
Asia	97	3	25	5	29	44	3	17	149	0	372
Northern America	3	0	0	0	0	3	0	3	10	0	19
South and Central America	33	0	0	4	0	9	0	0	6	0	52
Other Africa	14	0	5	3	0	0	0	0	9	0	31
Not Stated	49	0	0	0	0	9	19	12	3	65	157
Total	2,592	235	459	78	383	383	408	252	434	65	5,289

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Labour Force											
Employed	1,435	162	225	37	224	216	228	139	189	0	2,855
Unemployed	148	7	31	7	36	21	34	15	40	0	339
Not in the labour force	583	55	126	23	110	123	101	56	122	0	1,299
Not stated	426	11	77	11	13	23	45	42	83	65	796
Total	2,592	235	459	78	383	383	408	252	434	65	5,289
Level of Post-School Qualification											
Postgraduate degree	17	0	3	0	3	6	0	4	13	0	46
Graduate Diploma or Graduate Certificate	9	6	6	0	3	12	0	6	8	0	50
Bachelor Degree	123	24	14	3	31	44	36	20	71	0	366
Advanced Diploma and Diploma	99	9	17	6	25	21	20	16	36	0	249
Certificate	395	58	69	18	67	74	66	36	44	0	827
Other/Not Applicable	1,547	120	268	39	213	187	245	133	184	0	2,936
Total	2,190	217	377	66	342	344	367	215	356	0	4,474
Occupation											
Managers and Administrators	62	8	6	0	12	3	3	8	13	0	115
Professionals	171	36	20	9	40	42	31	21	32	0	402
Associate Professionals	169	21	27	3	22	22	29	26	17	0	336
Tradespersons and Related Workers	175	22	16	8	22	22	38	15	20	0	338
Advanced Clerical and Service Workers	47	6	17	0	3	3	6	6	5	0	93
Intermediate Clerical, Sales and Service Workers	347	38	50	6	45	41	40	28	37	0	632
Intermediate Production and Transport Workers	152	9	30	3	23	21	33	15	28	0	314
Elementary Clerical, Sales and Service Workers	172	18	35	5	26	16	24	12	23	0	331
Labourers and Related Workers	122	4	21	3	9	12	14	4	14	0	203
Not Stated	18	0	3	0	22	34	10	4	0	0	91
Total	1,435	162	225	37	224	216	228	139	189	0	2,855

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Semi-detached Dwellings											
Weekly Rent											
\$0-\$24	17	0	6	0	3	0	3	0	0	0	29
\$25-\$49	58	3	0	0	19	9	15	3	3	0	110
\$50-\$74	148	10	55	0	16	15	21	0	3	0	268
\$75-\$99	65	3	22	0	6	13	13	5	12	0	139
\$100-\$124	68	9	21	3	8	23	13	21	12	0	178
\$125-\$149	89	6	13	5	20	3	12	11	13	0	172
\$150-\$174	147	15	47	0	23	33	16	3	39	0	323
\$175-\$199	418	22	66	5	49	38	53	43	91	0	785
\$200-\$224	682	63	105	22	94	81	124	83	130	0	1,384
\$225-\$249	224	34	37	7	24	23	51	25	55	0	480
\$250-\$274	41	4	9	0	11	10	10	9	8	0	102
\$275-\$299	11	0	0	0	0	3	5	0	5	0	24
\$300-\$399	11	0	3	0	3	0	0	0	0	0	17
\$400-\$499	9	0	0	0	3	0	0	0	0	0	12
\$500 and over	9	0	3	0	3	0	0	0	7	0	22
Not stated	33	6	14	3	6	8	15	12	6	0	103
Total	2,030	175	401	45	288	259	351	215	384	0	4,148

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Household Type											
Couple family with children	148	11	46	6	47	32	24	29	208	0	551
Couple without children	230	40	63	7	56	57	38	31	85	0	607
Single Parent family	292	16	88	9	55	50	41	36	39	0	626
Lone Person Household	518	76	109	13	94	94	95	47	33	0	1,079
Group Household	127	19	35	0	23	36	51	26	46	0	363
Other	73	13	6	0	12	13	7	3	4	21	152
Total	1,388	175	347	35	287	282	256	172	415	21	3,378
Household Income											
Less than \$200	74	6	21	6	27	21	17	12	20	0	204
\$200-\$299	168	28	33	6	33	21	32	17	17	0	355
\$300-\$399	141	16	36	9	31	39	29	32	37	0	370
\$400-\$499	149	21	38	0	35	15	21	14	39	0	332
\$500-\$599	117	13	30	0	13	24	15	0	38	0	250
\$600-\$699	120	11	30	8	23	28	15	11	51	0	297
\$700-\$799	83	13	29	0	30	30	19	17	20	0	241
\$800-\$999	134	16	44	3	37	18	33	16	46	0	347
\$1,000-\$1,199	88	17	26	3	11	20	36	9	36	0	246
\$1,200-\$1,499	102	8	22	0	20	3	19	11	35	0	220
\$1,500-\$1,999	74	4	19	0	9	12	6	10	17	0	151
\$2,000 or more	35	6	3	0	9	0	6	5	6	0	70
Not Stated	103	16	16	0	9	51	8	18	53	21	295
Total	1,388	175	347	35	287	282	256	172	415	21	3,378

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Age											
0-14	80	5	23	4	20	21	13	17	42	0	225
15-24	364	67	102	5	70	57	103	48	101	0	917
25-34	311	30	92	4	78	68	48	43	130	0	804
35-44	175	14	45	3	28	35	24	26	81	0	431
45-54	155	14	39	3	27	28	23	18	31	0	338
55-64	105	6	23	6	19	30	18	10	12	0	229
65 and over	198	39	23	10	45	43	27	10	18	0	413
Not Stated	0	0	0	0	0	0	0	0	0	21	21
Total	1,388	175	347	35	287	282	256	172	415	21	3,378
Birthplace											
Australia	984	138	245	18	197	176	216	130	22	0	2,126
Oceania	51	6	21	0	7	6	8	8	69	0	176
North-West Europe	155	16	26	3	12	24	15	7	17	0	275
Southern and Eastern Europe	48	0	25	7	17	15	0	7	42	0	161
North Africa	4	0	3	0	3	0	0	3	4	0	17
Middle East	15	0	3	3	3	6	3	6	22	0	61
Asia	65	0	9	0	19	46	11	3	207	0	360
Northern America	0	0	3	0	3	3	0	0	11	0	20
South and Central America	11	0	3	3	3	3	0	3	12	0	38
Other Africa	4	0	3	0	0	3	3	0	9		22
Not Stated	51	15	6	1	23	0	0	5	0	21	122
Total	1,388	175	347	35	287	282	256	172	415	21	3,378

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Labour Force											
Employed	705	85	184	11	143	121	140	81	180	0	1,650
Unemployed	119	11	34	0	13	24	28	17	56	0	302
Not in the labour force	466	65	101	16	104	88	78	45	143	0	1,106
Not stated	98	14	28	8	27	49	10	29	36	21	320
Total	1,388	175	347	35	287	282	256	172	415	21	3,378
Level of Post-School Qualification											
Postgraduate degree	7	3	3	0	0	12	3	0	27	0	55
Graduate Diploma or Graduate Certificate	5	3	6	0	0	3	0	0	3	0	20
Bachelor Degree	61	19	18	0	27	30	20	6	64	0	245
Advanced Diploma and Diploma	52	13	7	0	12	12	13	12	34	0	155
Certificate	217	33	66	6	42	42	35	26	37	0	504
Other/Not Applicable	966	99	224	25	186	162	172	111	208	0	2,153
Total	1,308	170	324	31	267	261	243	155	373	0	3,132
Occupation											
Managers and Administrators	14	7	3	0	3	0	7	3	6	0	43
Professionals	71	13	10	5	22	24	19	13	18	0	195
Associate Professionals	63	11	16	0	16	15	14	9	17	0	161
Tradespersons and Related Workers	89	6	31	0	17	15	19	7	24	0	208
Advanced Clerical and Service Workers	23	3	7	0	0	0	0	3	3	0	39
Intermediate Clerical, Sales and Service Workers	176	22	46	0	22	31	33	16	29	0	375
Intermediate Production and Transport Workers	88	0	25	0	14	6	10	12	25	0	180
Elementary Clerical, Sales and Service Workers	97	17	22	3	17	21	21	9	23	0	230
Labourers and Related Workers	81	4	24	3	13	9	13	7	35	0	189
Not Stated	3	2	0	0	19	0	4	2	0	0	30
Total	705	85	184	11	143	121	140	81	180	0	1,650

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of less than 4 storeys											
Weekly Rent											
\$0-\$24	8	0	3	0	0	0	8	3	3	0	25
\$25-\$49	79	6	11	0	3	15	15	4	3	0	136
\$50-\$74	48	3	10	3	12	12	9	3	5	0	105
\$75-\$99	22	4	7	0	6	9	6	3	0	0	57
\$100-\$124	67	6	28	3	19	18	20	12	26	0	199
\$125-\$149	309	36	101	10	71	69	75	52	156	0	879
\$150-\$174	235	29	52	0	46	20	46	28	91	0	547
\$175-\$199	76	7	20	3	18	15	9	11	14	0	173
\$200-\$224	82	8	28	6	19	15	18	10	30	0	216
\$225-\$249	57	5	3	0	6	6	6	18	6	0	107
\$250-\$274	14	0	0	0	0	6	3	0	3	0	26
\$275-\$299	3	0	0	0	0	0	3	0	3	0	9
\$300-\$399	5	4	0	0	0	0	3	3	4	0	19
\$400-\$499	3	0	6	0	0	0	0	0	0	0	9
\$500 and over	20	0	6	0	0	3	3	0	0	0	32
Not stated	18	3	6	3	0	3	0	0	14	0	47
Total	1,046	111	281	28	200	191	224	147	358	0	2,586

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of 4 or more storeys											
Household Type											
Couple family with children	21	0	3	0	0	3	0	0	15	0	42
Couple without children	17	8	3	0	3	3	0	3	9	0	46
Single Parent family	30	0	3	0	3	6	0	4	0	0	46
Lone Person Household	42	3	8	3	6	15	8	6	0	0	91
Group Household	11	0	0	0	0	0	3	0	0	0	14
Other	5	6	0	0	5	4	0	1	0	11	32
Total	126	17	17	3	17	31	11	14	24	11	271
Household Income											
Less than \$200	12	0	3	0	0	3	0	0	0	0	18
\$200-\$299	12	0	0	0	0	3	3	0	0	0	18
\$300-\$399	13	0	0	0	3	3	3	0	0	0	22
\$400-\$499	11	0	0	0	0	6	0	3	0	0	20
\$500-\$599	13	0	0	0	3	0	0	0	7	0	23
\$600-\$699	13	3	0	0	0	0	0	3	3	0	22
\$700-\$799	7	3	0	0	0	0	3	0	0	0	13
\$800-\$999	27	0	6	0	0	3	0	0	4	0	40
\$1,000-\$1,199	3	0	0	0	0	0	0	0	0	0	3
\$1,200-\$1,499	4	3	3	0	0	0	0	0	0	0	10
\$1,500-\$1,999	11	3	0	0	3	9	0	3	0	0	29
\$2,000 or more	0	0	0	0	3	0	0	0	0	0	3
Not Stated	0	5	5	3	5	4	2	5	10	11	50
Total	126	17	17	3	17	31	11	14	24	11	271

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of 4 or more storeys											
Age											
0-14	11	0	0	0	0	0	0	3	0	0	14
15-24	35	8	5	0	0	14	4	0	0	0	66
25-34	31	3	7	0	3	8	4	8	12	0	76
35-44	14	0	0	3	8	3	0	3	6	0	37
45-54	19	3	5	0	3	0	3	0	3	0	36
55-64	8	0	0	0	3	6	0	0	0	0	17
65 and over	8	3	0	0	0	0	0	0	3	0	14
Not Stated	0	0	0	0	0	0	0	0	0	11	11
Total	126	17	17	3	17	31	11	14	24	11	271
Birthplace											
Australia	95	13	11	0	8	22	11	14	3	0	177
Oceania	3	0	0	0	3	0	0	0	5	0	11
North-West Europe	8	0	0	0	0	3	0	0	3	0	14
Southern and Eastern Europe	5	0	0	0	3	3	0	0	5	0	16
North Africa	0	0	0	0	0	0	0	0	0	0	0
Middle East	3	0	0	0	0	0	0	0	0	0	3
Asia	3	0	6	0	3	3	0	0	8	0	23
Northern America	0	0	0	0	0	0	0	0	0	0	0
South and Central America	3	0	0	0	0	0	0	0	0	0	3
Other Africa	3	0	0	0	0	0	0	0	0	0	3
Not Stated	3	4	0	3	0	0	0	0	0	11	21
Total	126	17	17	3	17	31	11	14	24	11	271

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of 4 or more storeys											
Labour Force											
Employed	65	10	11	0	6	6	7	12	15	0	132
Unemployed	15	0	3	0	3	3	0	0	0	0	24
Not in the labour force	41	0	3	0	3	15	4	0	9	0	75
Not stated	5	7	0	3	5	7	0	2	0	11	40
Total	126	17	17	3	17	31	11	14	24	11	271
Level of Post-School Qualification											
Postgraduate degree	0	0	0	0	0	0	0	0	3	0	3
Graduate Diploma or Graduate Certificate	0	0	0	0	0	0	0	0	0	0	0
Bachelor Degree	4	3	0	0	0	3	0	3	0	0	13
Advanced Diploma and Diploma	6	0	0	3	0	3	0	0	7	0	19
Certificate	16	3	6	0	3	0	0	3	0	0	31
Other/Not Applicable	89	11	11	0	14	25	11	5	14	0	180
Total	115	17	17	3	17	31	11	11	24	0	246
Occupation											
Managers and Administrators	3	0	0	0	0	0	0	0	0	0	3
Professionals	9	5	0	0	0	3	0	3	0	0	20
Associate Professionals	11	5	3	0	0	0	0	0	0	0	19
Tradespersons and Related Workers	5	0	0	0	0	0	0	3	0	0	8
Advanced Clerical and Service Workers	3	0	0	0	0	0	0	0	3	0	6
Intermediate Clerical, Sales and Service Workers	18	0	5	0	6	0	3	0	6	0	38
Intermediate Production and Transport Workers	4	0	3	0	0	3	3	0	0	0	13
Elementary Clerical, Sales and Service Workers	3	0	0	0	0	0	0	0	0	0	3
Labourers and Related Workers	5	0	0	0	0	0	0	0	6	0	11
Not Stated	4	0	0	0	0	0	1	6	0	0	11
Total	65	10	11	0	6	6	7	12	15	0	132

Urban Growth Management in Penrith Stage 2 Report

	Penrith	Blue Mountains	Blacktown	Fairfield	Other Western Sydney	Other Sydney	Balance of NSW	Balance of Australia	Overseas in 1996	Other/Not Stated	Total
Flats in a block of 4 or more storeys											
Weekly Rent											
\$0-\$24	3	0	0	0	0	0	0	0	0	0	3
\$25-\$49	13	0	3	0	3	3	3	3	0	0	28
\$50-\$74	10	0	3	0	0	0	0	0	0	0	13
\$75-\$99	7	0	3	0	0	0	3	0	0	0	13
\$100-\$124	10	0	6	0	0	3	0	3	0	0	22
\$125-\$149	35	3	4	3	3	12	6	3	21	0	90
\$150-\$174	11	3	3	0	3	3	0	0	0	0	23
\$175-\$199	0	0	0	0	0	0	0	0	0	0	0
\$200-\$224	3	0	0	0	0	0	0	0	0	0	3
\$225-\$249	3	0	0	0	0	0	0	0	0	0	3
\$250-\$274	0	0	0	0	0	0	0	0	3	0	3
\$275-\$299	0	0	0	0	0	0	0	0	0	0	0
\$300-\$399	3	0	0	0	0	0	0	0	0	0	3
\$400-\$499	3	0	0	0	0	0	0	0	0	0	3
\$500 and over	0	0	0	0	0	0	0	0	3	0	3
Not stated	3	0	0	0	0	0	0	3	0	0	6
Total	104	6	22	3	9	21	12	12	27	0	216