

# WAVERLEY LOCAL HOUSING STRATEGY

2020 - 2036



# ACKNOWLEDGEMENT

We acknowledge the Bidjigal and Gadigal people who traditionally occupied the Sydney coast.

We also acknowledge Aboriginal Elders both past, present and emerging.

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# 1 ABOUT THE STRATEGY

## 1.1 Purpose

The NSW Government requires all Councils to prepare a Local Housing Strategy (LHS). It is Council's response to the housing components of the Greater Sydney Commission's (GSC) Region Plan (*A Metropolis of Three Cities*) and District Plan (*Eastern City District Plan*). The preparation of the LHS was also an action from the Waverley Local Strategic Planning Statement (LSPS). The LHS is a framework that will guide the future of housing in Waverley over the next 20 years. The figure below shows that the LHS forms part of a suite of strategies that will inform a comprehensive review of Waverley's Local Environment Plan (LEP) and Development Control Plan (DCP).

## 1.2 Report structure

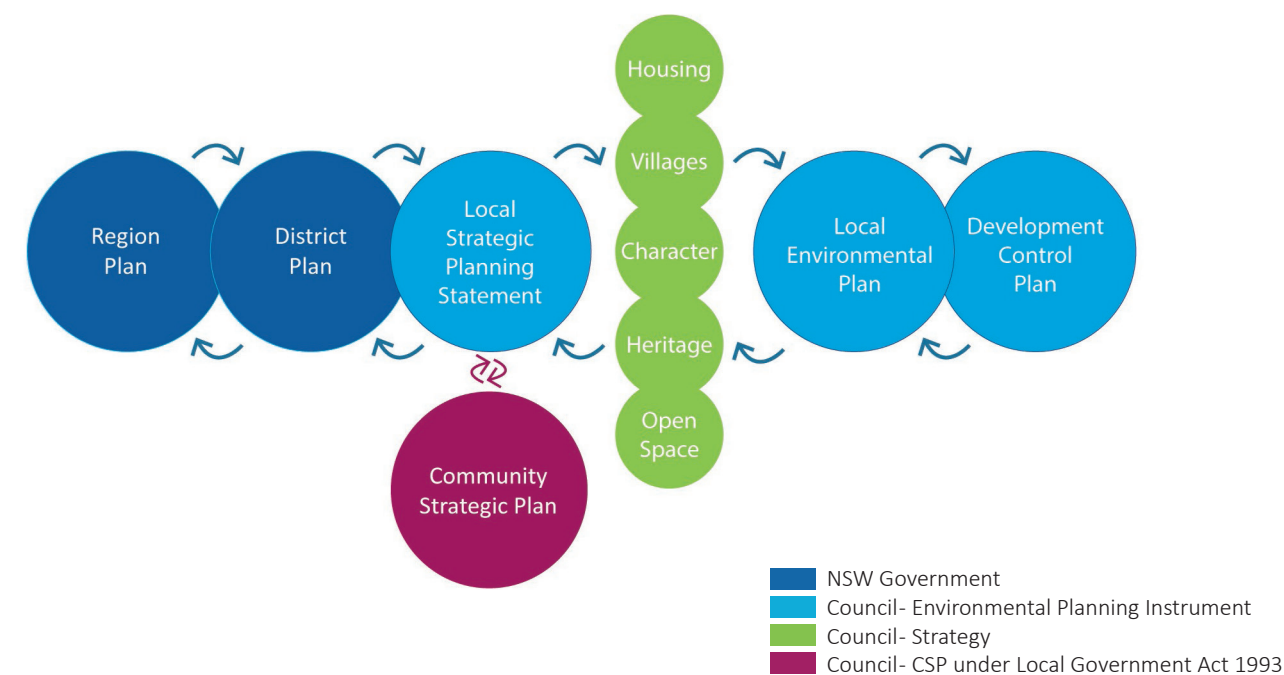
The draft strategy has been informed by several sources. Council undertook extensive community consultation for the preparation of the Waverley Community Strategic Plan (CSP). Further consultation on the draft LSPS and the Local Housing Discussion paper (LHDP) also uncovered important community feedback that informed the preparation of this

strategy. Furthermore, Council officers relied on ABS Census data, Profile ID, DPIE projections and housing supply data and supporting academic research to establish the evidence base.

The draft strategy has been prepared in line with the DPIE's Local Housing Strategy guidelines. It includes the following sections:

- *Policy Framework* – analysis of both the State and Local planning policy framework and its relevance to the future of housing in Waverley.
- *Local Government Area snapshot* – an overview of Waverley's urban structure and role in the Eastern District.
- *Evidence base* – demographic profile, housing profile, future housing demand, future housing supply, land suitability analysis, and draft housing targets.
- *Housing affordability* – affordable housing demand and supply, resultant latent demand for affordable housing, and affordable housing target.
- *Future housing* – priorities, actions and implementation and delivery plan.

Figure 1 Planning framework



# 2 EXECUTIVE SUMMARY

## 2.1 Key findings

Waverley’s residents are younger and have a higher proportion of high income and professional households than Greater Sydney. Residents in Waverley are active and more likely to walk or use public transport, with lower car ownership, than the Greater Sydney.

Over the last ten years, there has been an overall decrease in the proportion of households living in detached housing and an increase in the proportion of households living in apartments. Waverley has the second highest population density (80 people/Ha) in NSW with 66% of residents living in flats, units or apartments, compared to the Greater Sydney average where about 60% of the population live in detached houses. Even in relatively less dense parts of the LGA such as Dover Heights, the population density of 42 people/Ha still places it in the top 5% of most dense SA2s in NSW (30th out of 576 SA2s). This reflects the skew of dwelling types towards apartments. Waverley’s density is apparent when compared to neighbouring and suburban LGAs. Neighbouring Eastern Suburbs councils of Randwick (42 people/Ha) and Woollahra (48 people/Ha), are less dense than Waverley. Over the last 100 years, Waverley has taken a significant share of dwelling growth, proportionate to the size of the area, across Sydney.

Compared to Greater Sydney, Waverley has a high proportion of renters, which is linked to the predominant household types – including a younger demographic, more group homes and less couples with children compared to the Sydney average – and the higher percentage of apartments. Overall, the larger proportion of higher density housing in Waverley, combined with locational features such as accessibility to Sydney CBD, retail amenity, services and leisure, attracts and retains the unique demographic mix of younger and smaller households.

NSW Government releases population projection and housing supply data. This indicates that the population is expected to grow to 77,300 people by 2036, which represents an annual average increase of 0.5% per annum. ‘Lone person’ and ‘couple with

children’ households are expected to take up the largest proportion of growth amongst household types.

In the last five years, housing supply has been dominated by the completion of apartment buildings in Bondi Junction. This has represented a dwelling growth of 0.7% p.a. Prior to this peak supply, dwelling growth was 0.3% p.a.

The supply pipeline has been geared towards one to two bedroom apartments which are more profitable in the market. The population projections highlight underlying demand for larger, affordable apartments that could suit couple with children households.

Housing stress is a current and very real issue in Waverley where 30% of renting households are in rental stress. 85% of low income households are in rental stress. It has led to a significant loss of key workers (see pg. 58) across the Eastern District, placing Waverley in the top five LGAs in Greater Sydney to have the smallest key worker population. The current sources of affordable housing are from what is approved under the *Affordable Rental Housing State Environmental Planning Policy 2009* (ARHSEPP), Waverley Council’s Affordable Housing program and what’s available in the market. The current supply of affordable rental housing is only meeting 57% of demand. 43% of households in rental stress are not going to have their housing needs met in the current housing climate.

## 2.2 Recommendations

The District Plan requires that all Councils develop 6-10 year (2022-2026) and 11-20 (2027-2036) year housing targets. The GSC developed 0-5 year targets (2016-2021) for all Councils and Waverley’s was 1,250 dwellings. This reflected the current housing supply pipeline that we were already on track to exceed. The proposed housing target of 3,400 dwellings to 2036 reflects a growth rate of 0.4% p.a to 2036. In comparison, DPIE’s dwelling projection for Greater Sydney is that it will grow by 2% p.a to 2036.

Comparatively, in the last five years, Waverley’s most

significant housing growth was at 0.7% per annum reflecting the growth of Bondi Junction with the completion of several residential flat buildings. Prior to the significant growth of Bondi Junction, Waverley was growing at a rate of 0.3% p.a which has been primarily by infill development.

The housing target projects a similar level of growth to historical supply because beyond being already significantly dense, there are number of additional constraints to any further growth above current capacity. There is only so much ‘low hanging fruit’ left i.e. feasible and profitable sites, and these have been picked up in the capacity assessment. Once these sites are redeveloped, the high number of existing

sites are predominantly strata titled reducing the amount of developable areas. The feasibility of these remaining non-strata areas is limited because much of these are Heritage Conservation Areas, heavily capitalised or in locations where single dwellings attract a higher premium compared to apartments (i.e. some apartment complexes have been converted to single dwellings). Whilst a housing target has been developed, it should be noted that ultimately the take up of the housing target will be left to the market.

The following housing priorities have been developed to guide the future of housing in Waverley. Detailed actions are in the implementation and delivery plan in Section 8 Future Housing.

<b>Priority H1</b> Manage housing growth sustainably and in the right locations.	The proposed housing target of 3,400 dwellings to 2036 can be accommodated without any changes to the planning controls. There may be instances where existing planning controls do not align with the existing built form or desired future character. Planning proposals will be considered in line with the <i>Principles for Change</i> outlined in the WLSPS where any change to the planning controls should result in the delivery of public benefit. Council will also continue to work with state government agencies to track the impact of growth on infrastructure.
<b>Priority H2</b> Encourage a range of housing options to support and retain a diverse community.	Specific planning policies and legislation need to be reviewed to cater to particular housing needs. These include reviewing the bedroom mix for new development to promote three bedroom apartments, undertaking a detailed review of the applicability of the Seniors Housing SEPP and the Low Rise Medium Density Housing Code, and monitor the implementation of the short term rental accommodation policy framework.
<b>Priority H3</b> Increase amount of affordable rental and social housing.	There are opportunities to investigate increasing monetary contributions to support the provision of affordable housing. This could be through an LGA wide contributions scheme and increasing VPA contributions to Council’s affordable housing fund. There are several advocacy areas that should also be pursued with neighbouring Councils.
<b>Priority H4</b> Improve liveability, sustainability and accessibility through high quality residential design.	“New housing can minimise its impact on the environment. These include going above and beyond existing BASIX standards to improve the water and energy efficiency of new dwellings, expanding BASIX to include waste management and transport standards, developing passive design principles and a design guide to encourage incorporation of recycled content in building materials, shared gardens and compost systems, more planting through green walls and rooves, deep soil planting and permeable landscaping.
<b>Priority H5</b> Ensure new development is consistent with desired future character.	Design guidance could be improved to encourage a consistent approach to the alteration and additions to older apartment blocks. Council is currently identifying areas of local character that warrant more tailored planning controls and where exemptions from the Codes SEPP would be appropriate. In addition, Council officers are also undertaking a review of Waverley’s heritage items and conservation areas.





## 3 INTRODUCTION

### 3.1 Background

In 2018, major changes were made to planning legislation. These changes required all Councils to undertake a comprehensive review of their planning controls being the Local Environment Plan (LEP) and Development Control Plan (DCP). The purpose of the review was to give effect to the NSW Government's recently prepared Region Plan (*A Metropolis of Three Cities*) and District Plan (*Eastern City District Plan*).

The first step in the comprehensive review was the preparation of the first Local Strategic Planning Statement (WLSPS). Council adopted the inaugural LSPS in early 2020. Supporting the LSPS are a suite of environmental studies that make evidence-based recommendations for the comprehensive review. This Strategy forms the housing component of these environmental studies.

A key component in the preparation of the LSPS was the findings from extensive community consultation to the *Waverley Community Strategic Plan (2018-2029)* to develop Planning Priorities and Actions. This revealed how the community felt about the current state and future goals for housing in Waverley. It was identified that there is a desire to develop a holistic vision with respect to sustainable growth and development, increase affordable and social housing, avoid further high rise development and address the impact of Airbnb. Under the LSPS direction 'Housing the City,' the objective is to "facilitate a range of housing options in the right places to support and retain a diverse community."

### 3.2 Scope

This project's primary purpose is to respond to the GSC's Region and District Plans which sets out the State Government's growth strategy for the Local Government Areas (LGA) of Sydney. The draft Strategy responds to the State's housing priorities by applying them to the local Waverley context. The Plans also require that Councils must develop 6-10 year and 11-20 year housing targets. Community feedback from the CSP, the draft LSPS and the LHDP have also informed the development of the Strategy.

The scope of the strategy was determined by the Department of Planning, Industry and Environment (DPIE) *Local Housing Strategy Guidelines*. The Strategy considers the relevant policy framework to understand the role of housing in Waverley in the wider Sydney context. From the wider policy context, it moves into an overview and description of the LGA. It then establishes the evidence base including the current demographic and housing profile, interpreting DPIE's population projection and forecast housing supply data for future housing demand, housing affordability and affordable housing supply and demand. It also has a draft housing target, as required by the NSW Government. Lastly, the Strategy includes Priorities and Actions that are summarised in the Implementation and Delivery Plan.



# 4 POLICY FRAMEWORK

## 4.1 State Policy framework

Planning policies at a state level directly impact the work that local government undertakes. The policies below outline the most relevant policies to planning for housing at a local level. This provides context to planning for future housing in Waverley.

### 4.1.1 A Metropolis of Three Cities

A *Metropolis of Three Cities* – the Greater Sydney Region Plan prepared by the GSC is the current metropolitan plan for Sydney. The Region Plan puts forward a vision for Greater Sydney of three ‘Cities’ of which Waverley falls into the ‘Eastern Harbour City.’ Each city has goals related to Infrastructure and Collaboration, Liveability, Productivity and Sustainability, as well as Ten Directions that relate to the whole of the Greater Sydney Region.

The most relevant theme to housing is Liveability and details objectives for consideration in planning for future housing. The relevant housing objectives to Waverley are outlined below.

### Objective 10: Greater Housing Supply

This objective outlines that a range of housing types, tenures and price points will be needed to meet the demand for 725, 000 homes across Greater Sydney by 2036. New housing supply and creating capacity for this needs to be in the right locations, linked to both optimise existing infrastructure and maximise investment in new infrastructure. The plan suggests locational criteria for urban renewal investigation and concentrating local infill development. The most applicable to Waverley include: accessibility to regional and high frequency transport services, accessibility to jobs, efficient interchanges with a comprehensive walking and cycling network around local centres. In an established area like Waverley, housing has and is already being realised in areas with these locational features.

### Objective 11: Housing is more diverse and affordable

The Region Plan identifies that affordability needs to be addressed by providing a range of housing types,

particularly more affordable compact housing, as well as mandating affordable housing for sites subject to uplift in floor space. The Region Plan also identifies an affordable housing contributions target of 5-10% of the value uplift to be mandated as part of any uplift granted through rezoning.

Affordable housing contributions on 5-10% of the value uplift only is a weak response to the affordable housing crisis in Sydney. The affordable housing target should be generated from the ground-up as the notional 5-10% target based on uplift only seems mathematically improbable to be able to produce the required affordable rental dwellings. The target in the Region Plan carries too many assumptions and appears to be speculative at best. A target that is a percentage of the value of the whole development, not only of any uplift should have been considered. In large urban renewal precincts around the world, other Governments require between 20-50% affordable housing components to be delivered. Waverley will not see significant urban renewal therefore achieving a target like this on value uplift and will make little to no impact on providing affordable housing.

### 4.1.2 Eastern City District Plan

The *Eastern City District Plan*, prepared by the GSC, provides actions and strategies to implement the Aims and Objectives of the Region Plan *A Metropolis of Three Cities*. The following planning priorities set out in the District Plan are applicable:

### E4: Fostering healthy, creative, culturally rich and socially connected communities

Waverley is an established community with distinct village centres and activity nodes that foster culturally rich and socially connected communities. With access to world class beaches and open space, Waverley residents have access to healthy and active lifestyles.

### E5: Providing housing supply, choice and affordability, with access to jobs, services and public transport

The current housing stock is made up of primarily apartments. Diversity and affordability could be further encouraged to ensure a range of apartment sizes are provided to cater to population needs. To

date, significant apartment development has been concentrated in Bondi Junction due to access to the train station, jobs and services.

### E6: Creating and renewing great places and local centres, and respecting the District’s heritage

Waverley is made up of a variety of distinct character areas defined by built form, landscaping and its diverse communities. Conservation areas demarcate historically significant areas such as Queens Park and Bondi Beach. Later periods of development in the northern suburbs of Dover Heights, Vaucluse, and Rose Bay reflect newer homes of a different architectural style altogether. Village centres dotted throughout the LGA provide local services and amenities and vary in size and quality.

### E19 Reducing carbon emissions and managing energy, water and waste efficiently

Waverley is a leader in sustainability and this strategy should encourage energy efficiency innovation by incentivising highly energy-efficient buildings, encouraging building renovations that ensure lowcarbon and high efficiency performance, enabling green energy, water and waste infrastructure solutions.

### E20 Adapting to the impacts of urban and natural hazards and climate change

It takes a range of policies and tools to reduce risks from natural and urban hazards. The way neighbourhoods and buildings are planned and designed can help communities adapt and be more resilient to extreme heat. Increased tree canopy and green ground cover will help minimise these effects.

These objectives are important considerations to ensure that housing contributes to making communities liveable and vibrant.

### 4.1.3 Local housing strategy guideline and template

The DPIE released a Local Housing Strategy guideline and template to assist Councils with preparing their local housing strategies. This has been utilised and adapted to this strategy.

Figure 2 - Policy ‘Line of Sight’





## 4.2 Local policy framework

### 4.2.1 Waverley Community Strategic Plan 2018-2029

Under the *Local Government Act 1993*, all councils in New South Wales are required to prepare a Community Strategic Plan (CSP). The CSP must identify the community's main priorities and aspirations for the future. The most relevant theme from the *Waverley Community Strategic Plan 2018-2029* is 'Planning Development and Heritage.' The community's feedback on this section was summarised as follows:

- Avoid further high rise development and overdevelopment in general
- Develop a holistic vision with respect to sustainable growth and development
- Protect our heritage buildings, particularly Waverley cemetery and the Boot Factory
- Provide more social and affordable housing
- Address concerns about the impacts of short term rental accommodation, many seeking regulation and management.

These themes have shaped the Priorities and Actions for housing in Waverley.

### 4.2.2 Waverley Local Strategic Planning Statement

The Waverley Local Strategic Planning Statement (LSPS) plans for Waverley's economic, social and environmental land use needs over the next 20 years (2016-2036). This is the first LSPS developed by Council. The LSPS gives effect to a number of strategic plans prepared by the NSW Government. This includes implementing the directions and actions of the Region and District Plans. The LSPS identifies Planning Priorities to protect and support our infrastructure, environment, how we live and work so that we can

thrive. It identifies short, medium and long term actions that Council will take to help achieve our vision for a sustainable well connected community, living in a stunning natural environment.

Planning for future housing comes under the liveability theme and specifically the direction, "housing the city." An action of this direction is to prepare this Strategy.

## 4.3 Key implications

### Meeting dwelling targets

The Region and District Plans highlight that Sydney is going to continue to grow and housing must be provided to meet this projected population growth. Waverley is required to meet the 0-5 (2021) year housing target of 1,250 dwellings. The plans indicate a 20 year (2036) housing target for the total Eastern District of 157,500 dwellings. By extrapolating Waverley's current share of the 0-5 year housing target to apply forward to the 2036 target, Waverley would share 2.7% of the district's total future dwelling target.

### Range of housing supply

There are limitations to the types of housing that can be provided in the Waverley LGA. Where it is permissible, residential flat buildings are going to be the most viable option for redevelopment where land values are significantly high. Therefore, creative solutions must be investigated into how future housing, which is going to be skewed towards residential flat buildings, can meet a range of housing needs.

# 5 LGA SNAPSHOT

The Waverley LGA is 9km<sup>2</sup> and has a population of approximately 73,300 people. It is one of the most dense LGAs in Australia due to the established built form with distinct local character. Dwelling stock in Waverley LGA comprises mostly of residential flat Buildings and manor homes, with these two categories making up the majority of dwelling types in Vaucluse, Rose Bay, North Bondi, Bondi Beach, Bondi, Tamarama, Bronte, Waverley and Bondi Junction. Queens Park and Dover Heights suburbs comprise predominantly detached dwellings.

Waverley plays an important role in the Eastern District by connecting the city and the sea. The Waverley community currently enjoys access to world famous beaches and world-class open spaces for residents to participate in a range of recreation activities. This allows people to both connect with nature, enjoy active and passive recreation activities, and to support healthier lifestyles.

Our area is well serviced by libraries, community centres and hospitals including Prince of Wales, St Vincent's, Bondi Junction and the War Memorial Hospitals, as well as a concentration of health related businesses and services located in the Bondi Junction Strategic Centre.

Waverley has a much higher mode share of walking, cycling and public transport than Greater Sydney. Only half of all trips in Waverley are made by car, compared to two-thirds in the rest of Sydney. A third of all trips are on foot.

Bondi Junction Transport Interchange is a major transport hub that accommodates 86,500 passengers a day or 30 million a year. Bus routes leaving and entering the interchange connect to key destinations across the Eastern District including Randwick Health and Education Precinct, Sydney's Eastern Beaches, Sydney Airport, Eastgardens-Maroubra Strategic Centre, and Burwood.

These maps overleaf show these features of the LGA.





Figure 3 - Waverley Local Strategic Planning Statement Infrastructure and Collaboration Structure Plan

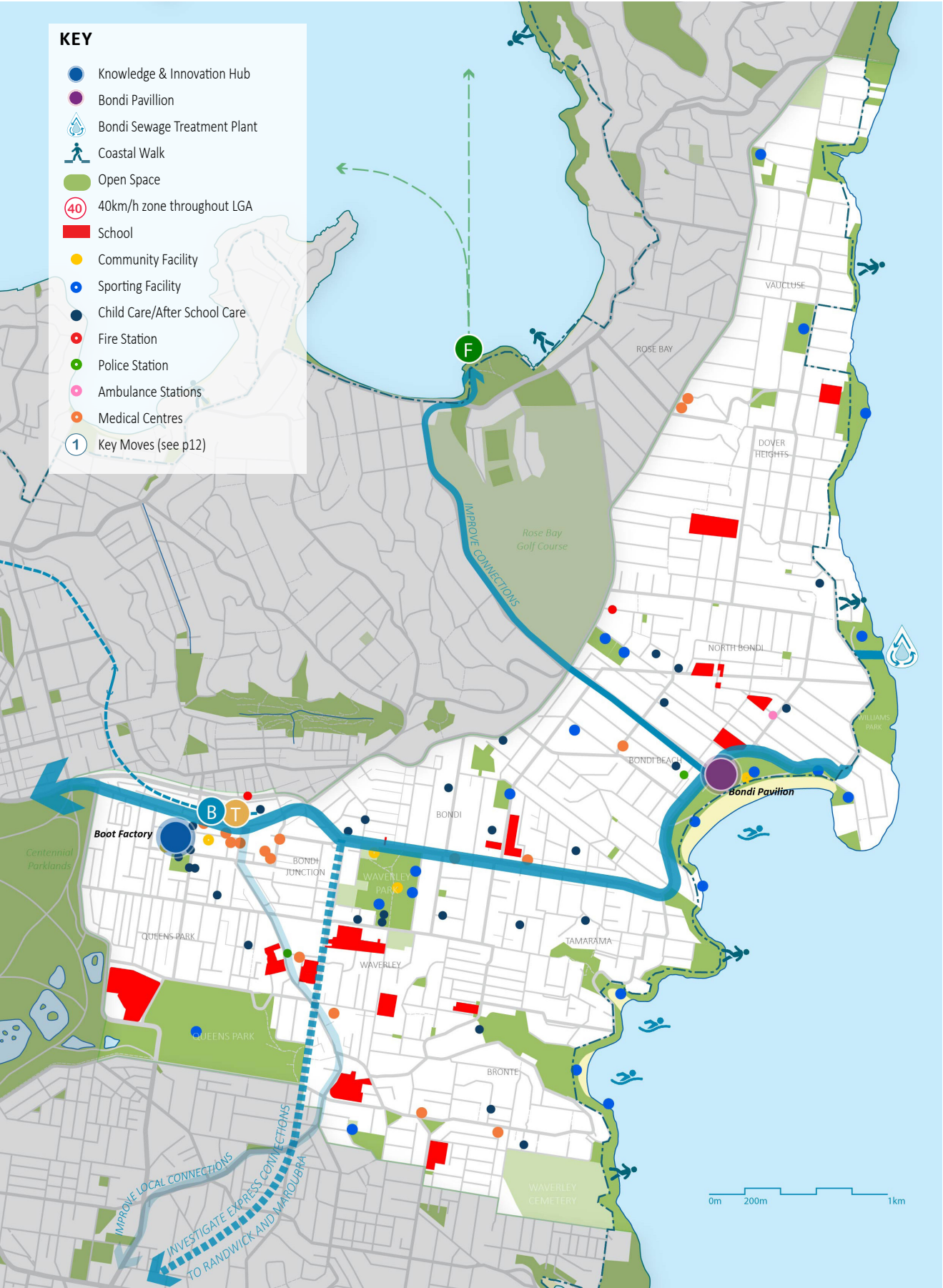
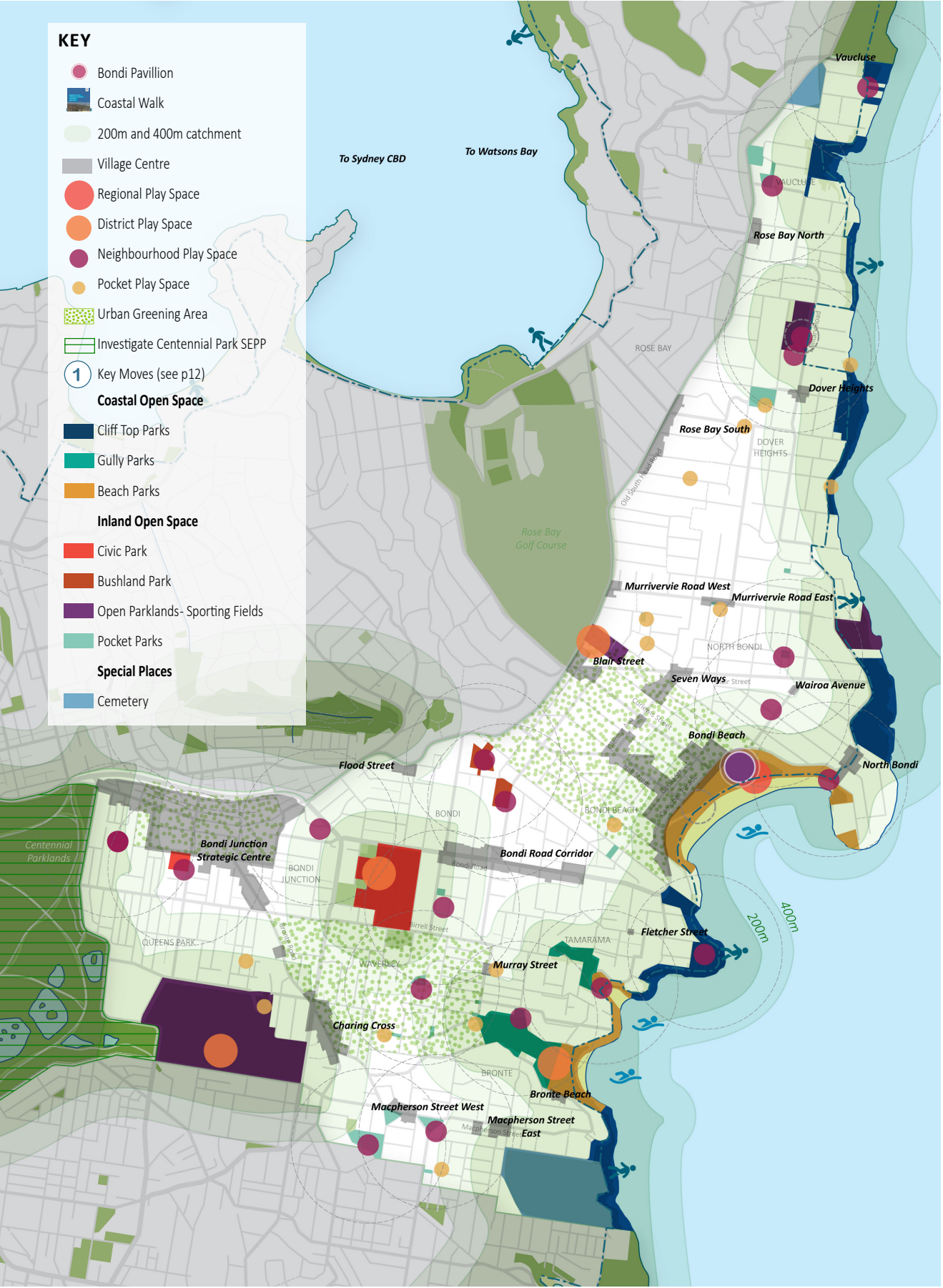


Figure 4 - Waverley Local Strategic Planning Statement Liveability Structure Plan





# WAVERLEY AT A GLANCE



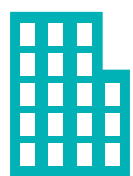
OUR LOCAL  
GOVERNMENT  
AREA

9.2km<sup>2</sup>

## OUR DWELLINGS AND BUSINESSES



30,496  
dwellings



34,000  
registered businesses

## MEDIAN AGE

35 years

- 16% of our residents are 0–14 years old
- 8.9% are 15–24 years old
- 33.4% are 25–39 years old
- 28.7% are 40–64 years old
- 12.7% are more than 65 years old

OVERSEAS BORN  
RESIDENTS

38.4%

## OUR SUBURBS

Bondi Beach, Bondi Junction, North Bondi, Bronte, Dover Heights, Queens Park, Rose Bay, Tamarama, Vaucluse and Waverley



## OVERSEAS BORN RESIDENTS TOP COUNTRIES

United Kingdom, South Africa, New Zealand, Brazil and Ireland

## POPULATION



TOTAL POPULATION

73,300

PROJECTED  
POPULATION  
2036

77,300

DENSELY  
POPULATED  
AREA

## ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLE

274



## LANGUAGES

68.8% of us speak English at home while 25.7% speak a language other than English

Russian is spoken by 2.2% of our residents, 2.1% speak Spanish, 1.9% Portuguese, 1.8% French and 1.7% Italian



## JEWISH COMMUNITY



Waverley's Jewish community of

10,076

residents makes up 15.1% of our total population

## HOUSING

### AVERAGE HOUSEHOLD SIZE



2.3  
people

RENTING  
HOUSEHOLDS

43%

MEDIAN  
WEEKLY RENT

\$620

SINGLE PERSON  
HOUSEHOLDS

27.7%

COUPLES WITH  
CHILDREN

23.8%

## EDUCATION

17 NUMBER OF SCHOOLS  
(including both primary and secondary)

39.5% of our residents aged over 15 years have a Bachelor or higher degree compared to 24.1% for Greater Sydney

20% of young people aged 15–24 years attended an educational institution including high school and/or a higher education facility, such as TAFE or university

## DISABILITY

3% of the population reported needing help in their day-to-day lives due to health and disability

## ECONOMY



\$4.36 billion  
gross regional product

More than  
27,546  
jobs in Waverley

## MEDIAN TOTAL INCOME/WEEK

for Waverley households in 2016 was

\$2,300 compared to \$1,683 for Greater Sydney

## KEY EMPLOYMENT SECTORS

Retail Trade, Health Care and Social Assistance, Accommodation and Food Services, Education and Training, and Professional, Scientific and Technical Services

79.9% of Waverley properties are connected to the internet

Sources: ABS Census 2016, Economy.Id, Australian Business Registry Data





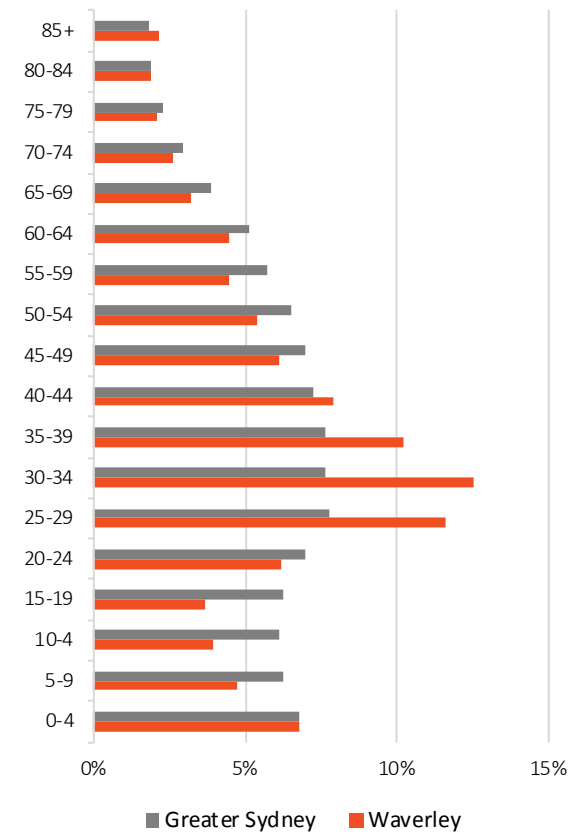
# 6 EVIDENCE BASE

## 6.1 Demographic profile

### 6.1.1 Age and population

The population of Waverley is approximately 73,300 people with a median age of around 35 years, which is slightly younger than Greater Sydney (36 years). There is also a lower proportion of school aged children (5 to 19 year olds) compared to Greater Sydney.

**Figure 5 - Age distribution in Waverley and Greater Sydney**



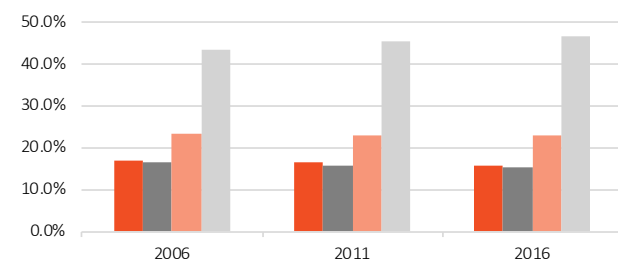
Source: ABS Census, 2006, 2011 and 2016.

### 6.1.2 Income and employment

Waverley has a uniquely high proportion of high income households (39%) compared to Greater Sydney (28%). The number of high income households has been on an increasing trajectory since 1996, where just more than twenty years ago Waverley residents used to earn slightly more (105%) than the Sydney average – now they earn around 132% of the Sydney average. When zooming into the individual income quartiles the highest income group was the only category that increased in Waverley over 2006 to 2016 (44% to 47%). At the same time, there has also been a decrease in low income households (17% to 16%), as well as 2nd and 3rd quartile incomes. The trend has been the opposite for Greater Sydney, where even though there is a more even spread of income earners across the quartiles, there was a decrease in high income households (29% to 28%) and an increase (24% to 25%) in low income households. This highlights that Waverley has been undergoing gentrification and this is likely to continue into the future as land values and dwellings continue to get out of reach.

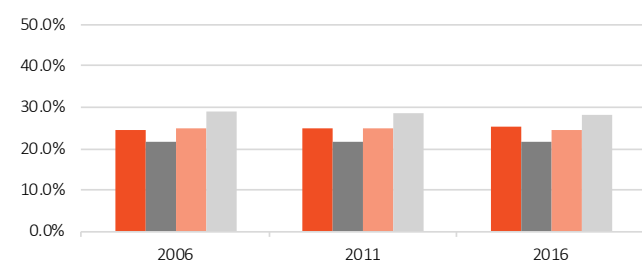
It becomes clear that the high proportion of high income earners can be attributed to the occupations Waverley residents are employed in. Most people in Waverley are professionals (39% compared to 26% in Sydney) followed by managers (19.7% compared with 13.7% in Sydney). In 2016, the largest industries where people worked were in professional, scientific and technical services, financial and insurance services and health care and social assistance.

**Figure 6 - Waverley Individual Income Quartiles by Census Year**



Source: ABS Census, 2006, 2011 and 2016.

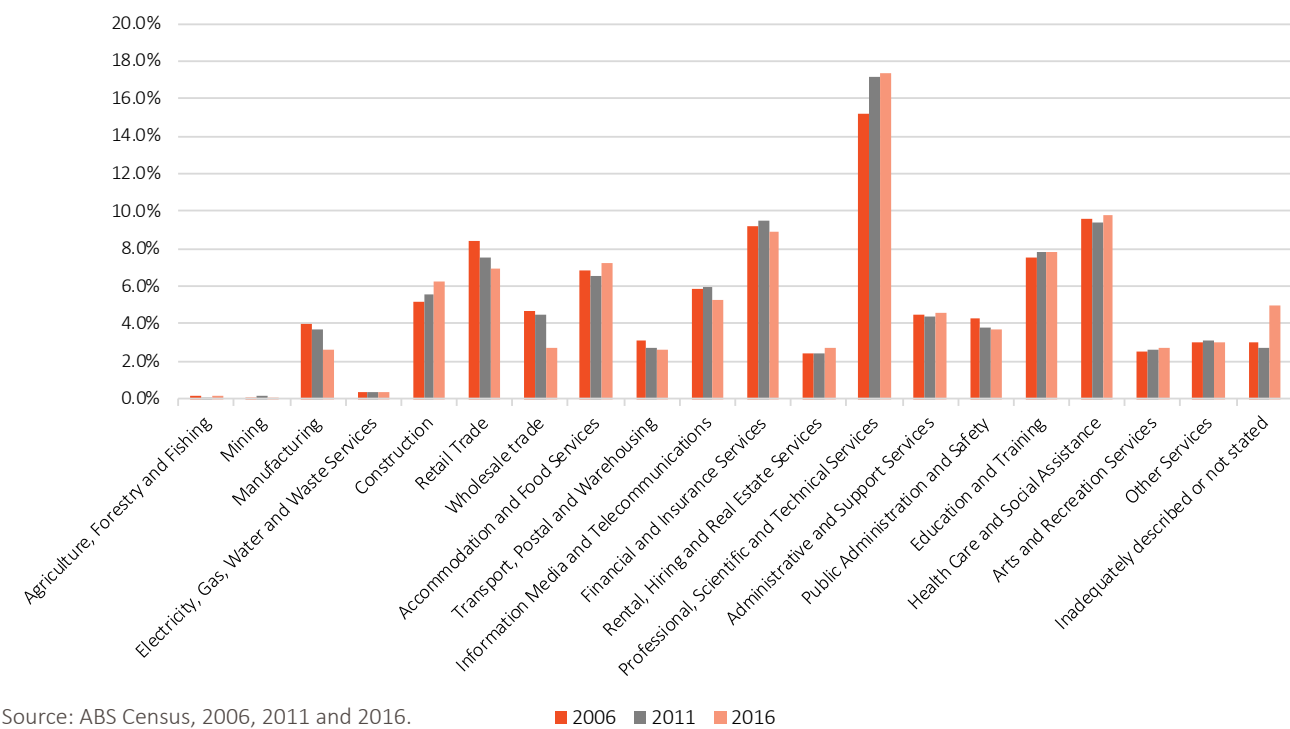
**Figure 7 - Greater Sydney Individual Income Quartiles by Census Year**



Source: ABS Census, 2006, 2011 and 2016.



Figure 8 - Industries where Waverley residents are employed



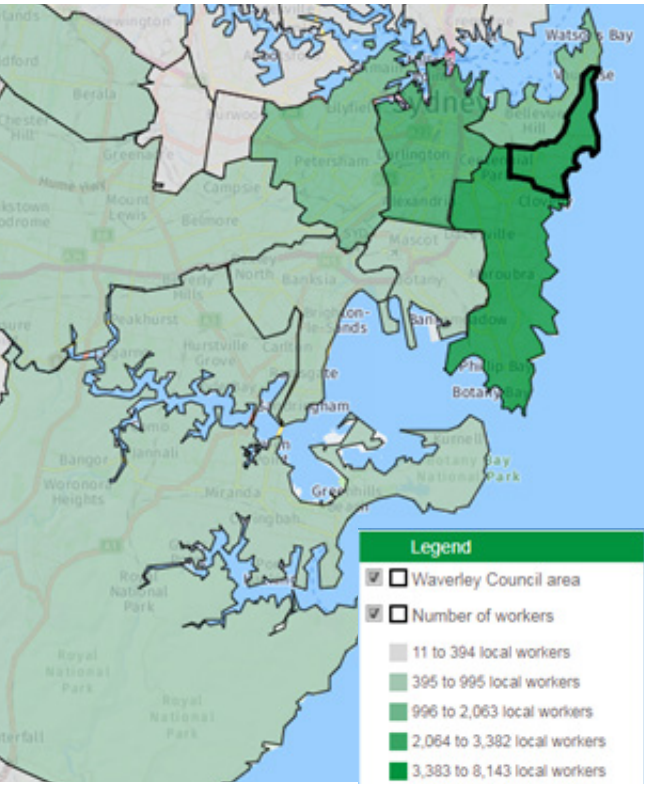
Source: ABS Census, 2006, 2011 and 2016.

6.1.3 Travel habits

Approximately 66.5% of workers within the Waverley LGA live outside of the area whilst 33.5% live and work within the LGA.<sup>1</sup> This means that a large proportion of the workforce has to commute to Waverley from surrounding LGAs. Figure 9 shows places of residence of Waverley’s working population.

Waverley’s residents who work either in the LGA or elsewhere, are more likely to walk, cycle or use public transport as part of their journey to work (44%) compared to Greater Sydney (31%). Waverley has a lower rate of multiple car ownership than Greater Sydney and for non-work related trips people tend to walk in Waverley.<sup>2</sup> The established higher built-form density of Waverley and good access to public transport and amenities would likely foster such behaviour, and in turn attract future residents that value these attributes and who may or may not have a need for a car.

Figure 9 - Place of residence of workers within Waverley



Source: Transport for NSW Household Travel Survey 2019.

<sup>1</sup> Ibid  
<sup>2</sup> Household Travel Survey, 2014, Transport for NSW.

6.1.4 Household size

There has been a long-term trend across Australia for decreasing household sizes since the 1960s; influenced by increases in couple and single person households. The increase in couple households is partially due to the increasing propensity for couples to remain childless, but also the growing number of empty nesters. This trend was evident in Waverley, particularly in the period between 1991 and 2006 the average where the household size decreased from 2.24 to 2.19 persons.

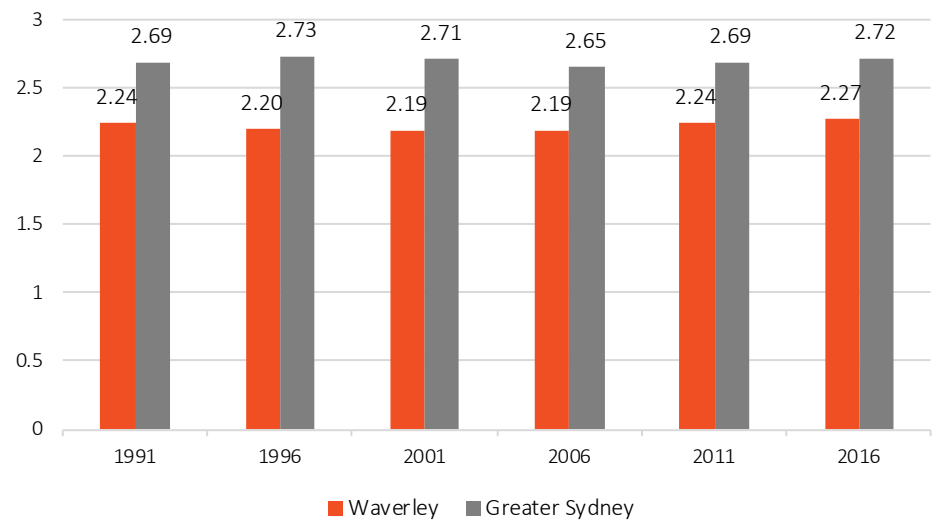
However, the trend towards shrinking households has reversed in recent years. It can be seen in the figure below that since 2006 the average household size has increased from 2.19 to 2.27. It is likely that affordability pressures have halted the decline in household size as new household formation has been temporarily deferred (with children at home longer, for example). It also likely reflects the need to rely on a larger household such as share housing between young people studying and/or working in and around the area– and a delay in new household formations – to afford higher priced housing.

6.1.5 Household types

Household types are one of the most important demographic indicators as it reveals an “area’s residential role and function” and provides “key insights into the level of demand for services and facilities”.<sup>3</sup> The most common household types in Waverley are lone person (24.7%), followed by couple with children (23.8%) and then couple only (23.5%). Waverley has a higher proportion of lone person, group and non-classifiable households than Greater Sydney, but a significantly lower proportion of couples with children. This reflects the age breakdown with the lower proportion of school children. In addition to the ABS categories for household types, it is worth noting that whilst available data on empty nesters is only indicative, in 2016, ‘empty nesters’ made up approximately 16% of households in Waverley, compared to 19% for Greater Sydney.

Whilst Waverley has a smaller proportion of couple with children households compared to Greater Sydney, there has been an increase in the proportion of families with children under 15 years old. It seems to be unique to Waverley when comparing this trend with Greater Sydney as seen in Figure 11 overleaf. This shows that Waverley is becoming an increasingly attractive place to live for young families.

Figure 10 - Average household size - Waverley and Greater Sydney



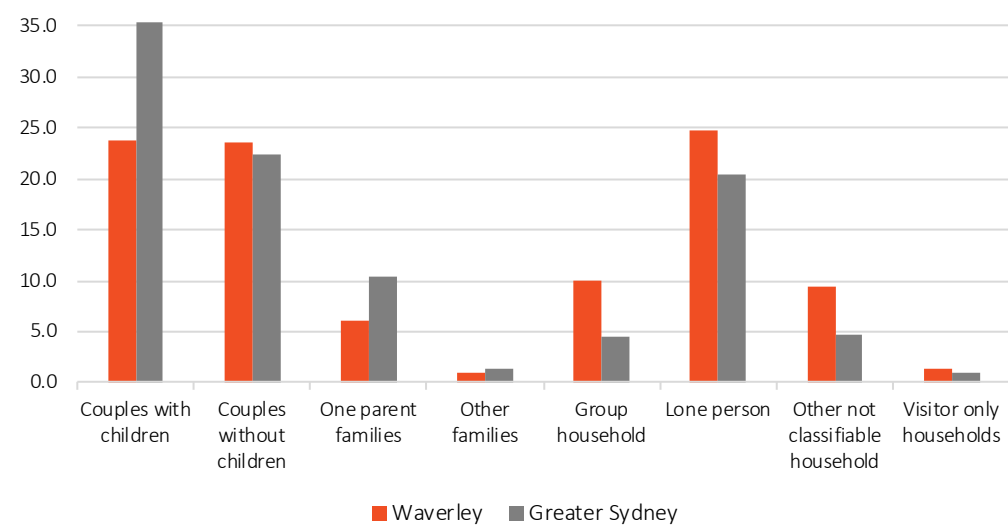
Source: ABS Census 2016.

<sup>3</sup> Profile ID 2019.

The housing choices that people ultimately make are based on a complex bundle of elements, with different households preferring, or willing to trade-off, certain elements of this bundle for others. The economic theory suggests that the closer housing is to jobs and services the more likely households are to accept smaller, higher density housing. That is, they will ‘trade-off’ the cost of commuting with dwelling size. As well as the conventional ‘economic’ housing preference consideration (that is location versus dwelling size versus household budget), issues of tenure, lifecycle and lifestyle aspirations all contribute to both housing preference (unconstrained) and actual housing decisions.

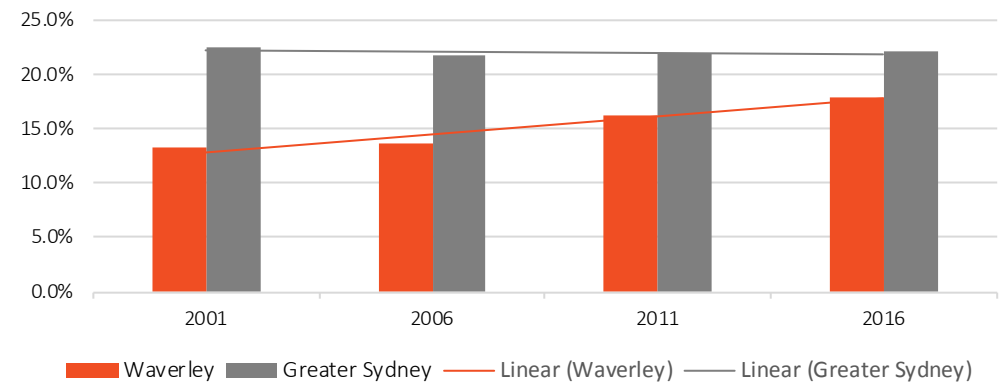
Research by the Grattan Institute shows that households are prepared to make housing trade-offs driven by affordability and lifecycle factors, which would lead them to choose more compact housing if available. For a big share of households, factors such as ‘proximity to work’ and ‘being near a school’ were ranked lowly, the inference being that people may choose their housing location first, and employment and education location second. It is noted that this may represent a shift from earlier findings and could be attributable to the rise of double-income households and the frequency with which Australians change jobs.<sup>4</sup> Preferences varied within different segments of the population for different housing attributes.

Figure 11 - Household types in Waverley and Greater Sydney



Source: ABS Census 2016.

Figure 12 - Percentage of households with children under 15 in Waverley and Greater Sydney



Source: ABS Census 2006, 2011 and 2016.

<sup>4</sup>Kelly, J 2011, The Housing We’d Choose, Grattan Institute

Waverley boasts accessibility to jobs and services, meaning households have made the trade-off for location over dwelling size. This is one of many factors that has resulted in two thirds (66%) of Waverley’s households now living in a flat or apartment. The graph below shows that lone person (27%) and couple family with no children (22%) currently make up the largest proportion of households that live in a flat or apartment.

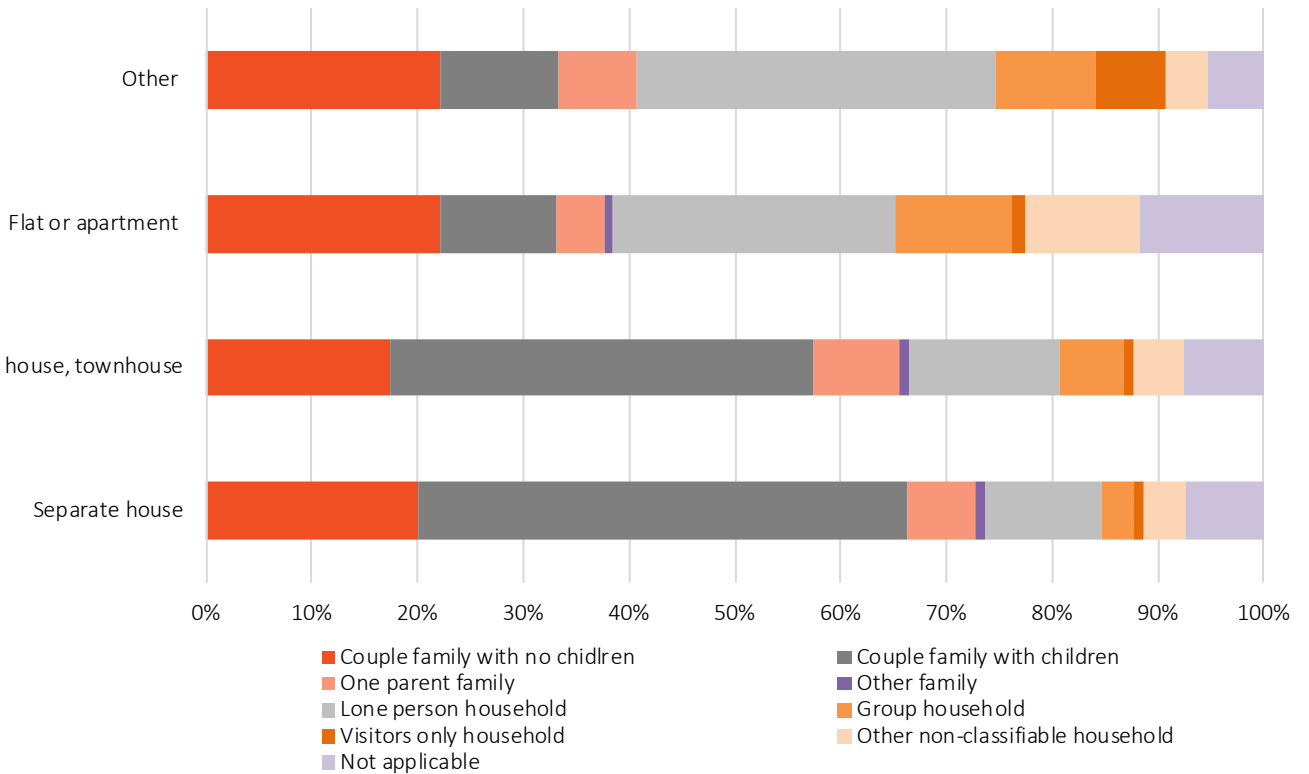
There has been an ongoing trend since 2006 for families to live in medium to high density housing in Waverley. 15% of households living in a flat or apartment are made up of families with children. This is a growing trend across Australia but markedly in Sydney where 30% of women aged 35-39 with one child and 10% of those with two or more children were occupying a flat, unit or apartment.<sup>5</sup> It should be noted that despite the increase in families living

in apartments, factors such as affordability and declining availability of large housing stock such as semi-detached and detached housing are also part of the decision making to decide to live in apartments, rather than it being the first preference. Given the constraints of diversifying housing stock (see more in section 6.3 Demand and 6.4 Supply), the most ‘available’ housing option would be apartments rather than detached housing.

6.1.6 Summary

The demographic profile in Waverley has significantly changed over time. Waverley is younger and has a higher proportion of high household income earners working in professional scientific and technical services when compared to Greater Sydney. They are more likely to live in a flat or apartment than other household types. The demand to live close to the

Figure 13 - Household types and dwelling structure in Waverley, 2016



Source: ABS Census 2016.

<sup>5</sup> Birrell, B & McCloskey, D 2015, ‘The housing affordability crisis in Sydney and Melbourne: Part one the demographic foundations,’ The Australian Property Research Institute.



CBD and world class beaches has seen the attraction of higher income earners over the last twenty years who can afford increasingly expensive property prices, pushed up by high demand.

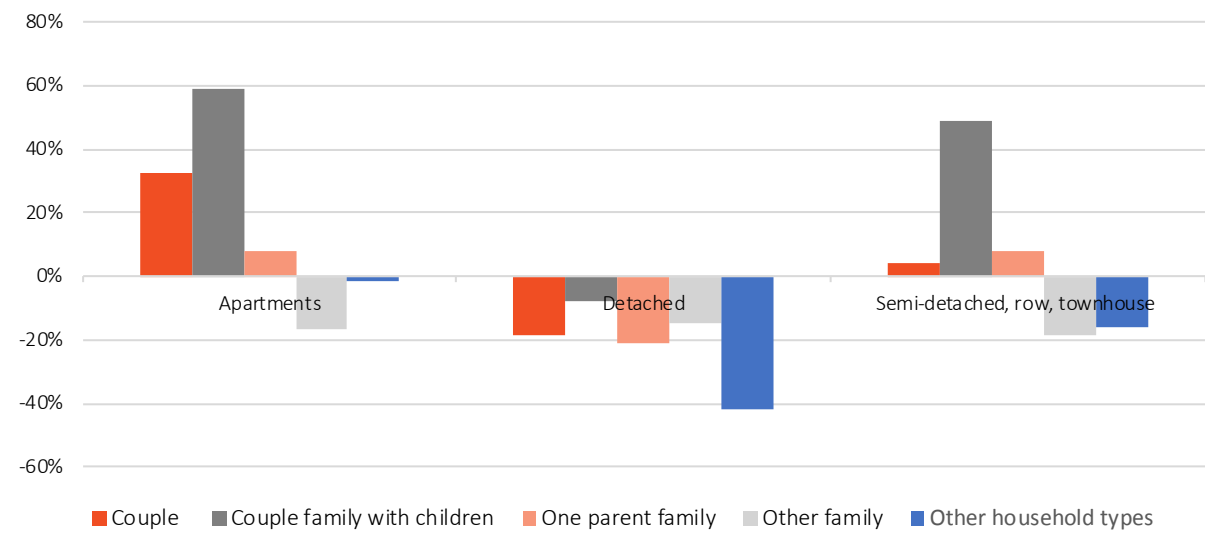
Waverley has a range of local industries where the largest local employers are retail trade, accommodation and food services, and health care and social assistance. These dominant local employment industries are in contrast to the employment industries of those who live in Waverley in terms of income.

Residents in Waverley are active and more likely to walk or use public transport, with lower car ownership, than the rest of Greater Sydney, given access to high frequency bus routes and a train station.

Waverley has a smaller average household size reflecting the greater rate of lone person and couples without children households living in apartments. It should be noted that household size is increasing again across Greater Sydney which is reflective of broader trends relating to affordability and its impact on delayed household formation or larger households grouping together to afford housing costs.

There has been a notable increase in the number of families with children in Waverley. More than a third of families live in apartments as trade-off for living in an accessible area, rather than a larger dwelling elsewhere. This is likely a factor of the availability of relatively affordable apartments in comparison to detached housing.

Figure 14 - Changing dwelling preferences for family households types, Waverley 2006-16



Source: ABS Census 2006, 2011 and 2016

6.2 Housing profile

6.2.1 Residential development history

The earliest form of statutory land use planning in NSW was introduced with the gazettal of the *Local Government Act 1919*. This act empowered councils under Section 309 to regulate the use of land by means of ‘Residential District Proclamations’. An amendment in 1928 extended the powers to the prohibition of residential flats, and a further amendment in 1940 added powers to regulate the permissible site coverage of flat buildings. Waverley took early advantage of the new powers under the act, with the first proclamation applying to the area bounded by Carrington Road, Salisbury Street, Henrietta Street and Victoria Street gazetted on 27 February 1920. Later came strategies and ordinances (now known as Local Environmental Plans) developed by Council to guide development with intermittent State Government influence. Since 2006 a standard template Local Environmental Plan, that is consistent across all local government areas, has been used in Waverley.

6.2.2 Dwellings today

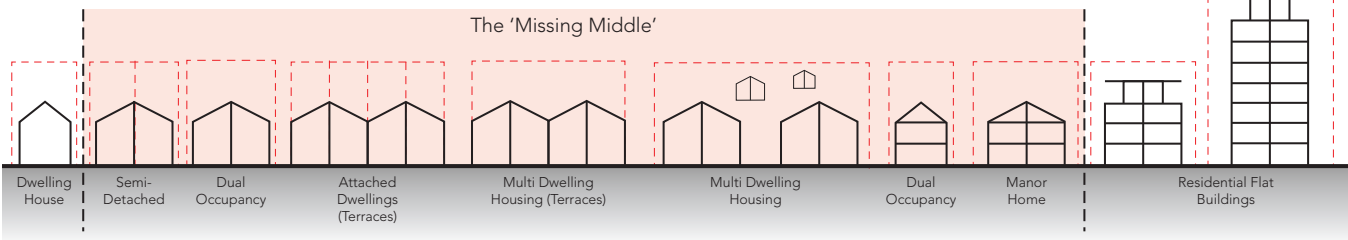
Within each of the housing typologies there is considerable variation of architectural styles, densities and built form. This is especially apparent in Waverley where residential development occurred in ebbs-and-flows, influenced by changing trends in living, household structures, and architectural fashions. The Waverley Architectural Mapping Project (WAMP) revealed that there are examples of properties from the Colonial, Victorian, Federation, Inter-war, Mid 20th Century, Late 20th Century and 21st Century architectural styles.

6.2.3 Dwelling types and density

In the 2016 census, Waverley had a population of 73,300 and a land area of 925 hectares (79 people/Ha). Waverley has the second highest population density in NSW following City of Sydney (87 people/Ha). This is reflected in its housing types where less than 20% of residents live in detached houses, around 20% live in terraces and duplexes, and the remaining 60% live in flats, units or apartments.<sup>6</sup> This differs to Sydney where about 60% of the population live in detached houses.

The opportunity for growth in Waverley varies due to the differing levels of density within the LGA. For example North Bondi has 125 people per hectare and is the 7th densest SA2 in NSW (along with Bondi), while areas such as Dover Heights have a population density of 42 people per hectare. Ostensibly, based on average densities there is opportunity for growth in areas such as Dover Heights and Vaucluse. However, Dover Heights is still in the top 5% dense SA2s in NSW (30th out of 576 SA2s), with the population density of other LGAs across Greater Sydney being much lower. Neighbouring Eastern Suburbs councils of Randwick (42 people/Ha) and Woollahra (48 people/Ha), are less dense than Waverley (Figure 15). From a more suburban context, Parramatta (30 people/Ha), Blacktown (15 people/Ha) and Liverpool (7 people/Ha) have much lower densities still. This analysis suggests, from a density perspective, there is much more ‘room to grow’ in other LGAs across Greater Sydney and that naturally Waverley’s population projections would moderate as Waverley takes a lower share of Greater Sydney’s future population growth. Dwellings in Waverley are also smaller with an average of 1.9 bedrooms (compared to 2.7 bedrooms in Sydney).

Figure 15 - Housing typologies and the ‘Missing Middle’



Source: Department of Planning, Infrastructure and Environment 2019

<sup>6</sup>Profile ID 2019.





Residential flat building



Dual occupancy/duplex



Shop-top housing.



Art Deco residential flat buildings

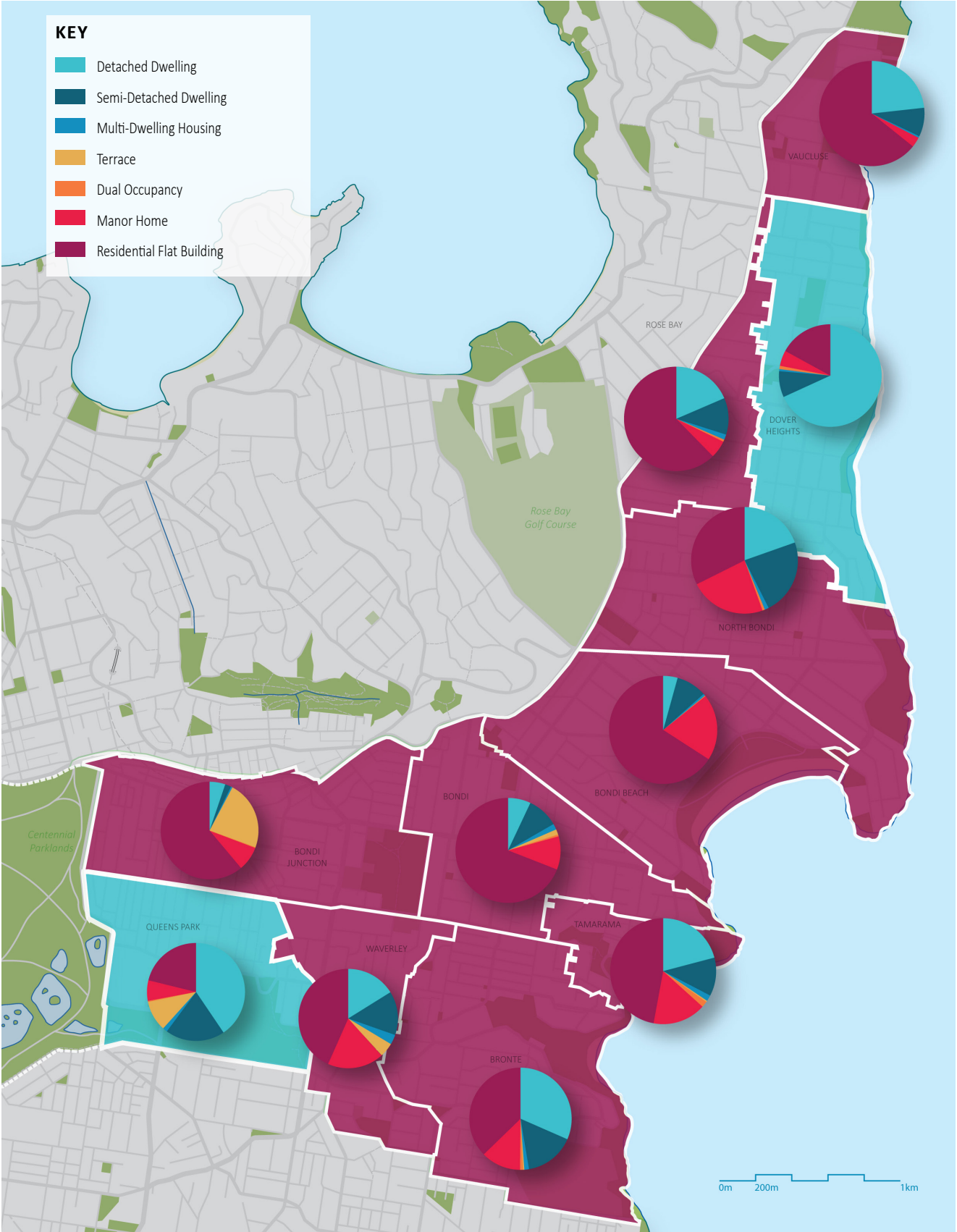


Federation terraces.



Detached house.

Figure 16 - Housing typology mix

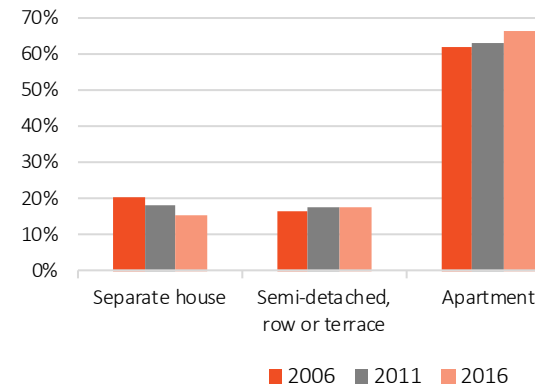




It is interesting to note that the density of both Randwick and Woollahra is similar despite considerably different housing typologies. Woollahra achieves its density with a high proportion of semi-detached, terraces houses and towers; whereas Randwick achieves its density with apartments clustered in and around Coogee and Randwick. Moreover, the suburbs of Bondi Junction (96 people/Ha), Bondi Beach (112 people/Ha) and Paddington (96 people/Ha) all have a similar population density despite very different built-forms of high-rise, walk-up apartments and terraces, respectively.

A further breakdown of the dwelling types highlights why Waverley has one of the highest densities in Australia. Over the last ten years, apartments have grown from 62% to 66% of Waverley’s housing stock; driven by the development of Bondi Junction. Meanwhile, separate houses have decreased from 20% to 15% in the same period. In an area that is already dense, it is not surprising that housing stock growth was dominated by apartments. A trend which will likely continue, with the replacement of detached dwelling stock with apartments.

Figure 17 - Dwelling structure Waverley, 2006-16



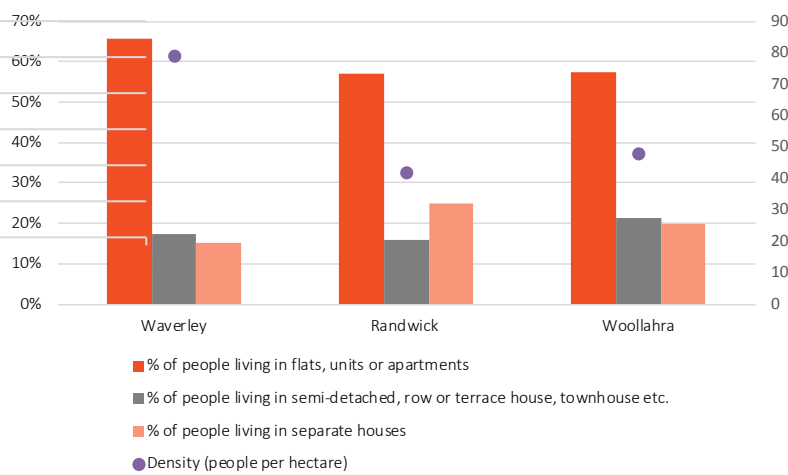
Source: ABS Census 2006, 2011 and 2016.

6.2.4 Housing tenure

Tenure refers to whether someone owns or rents a property. Most households in Waverley have purchased or are paying off a mortgage (44%) followed by households who rent (41%). This is similar to the other Eastern Suburbs LGAs, however, Randwick has a considerably higher concentration of social housing (6%) compared to Waverley (1.8%) and Woollahra (0.4%).

Waverley (as well as Woollahra and Randwick) has a high proportion of renters (Figure 18). This is likely due to the younger demographic, more group homes, less couples with children and a transient population of working visitors. Recent media attention has been given to the declining rate of home ownership across Australia, particularly amongst 25-34 year olds. This has been used as a point to highlight the declining affordability of housing as first home buyers struggle to enter the market.<sup>7</sup> This may not necessarily be the case in Waverley where the higher proportion of renters is most likely the result of the predominant household types – for example, younger demographic, more group homes and less couples with children compared to the Sydney average – and a higher percentage of apartments that are traditionally more likely to be rented than detached and semi-detached

Figure 18 - Dwelling types and population density: Randwick, Woollahra and Waverley LGAs

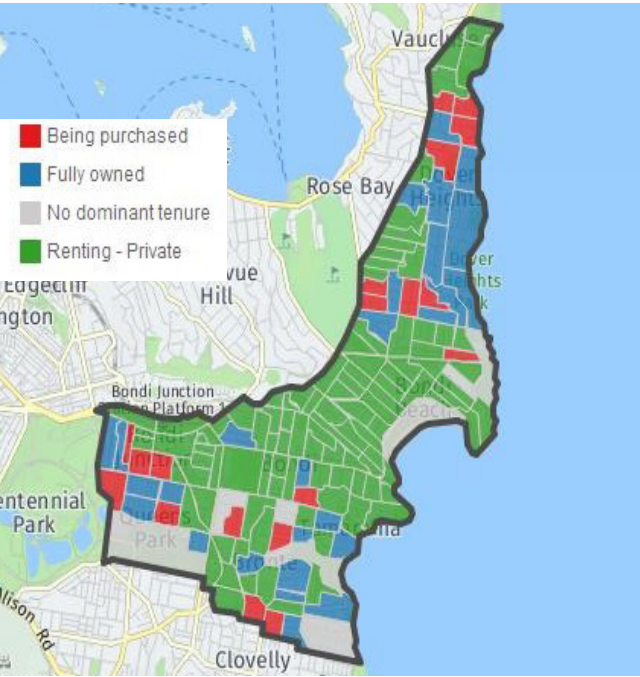


Source: ABS Census 2016.

<sup>7</sup> RMIT ABC Fact Check 2019, ‘Labor says the home ownership rate for young people has fallen 20 per cent. Is that right?’, ABC news.

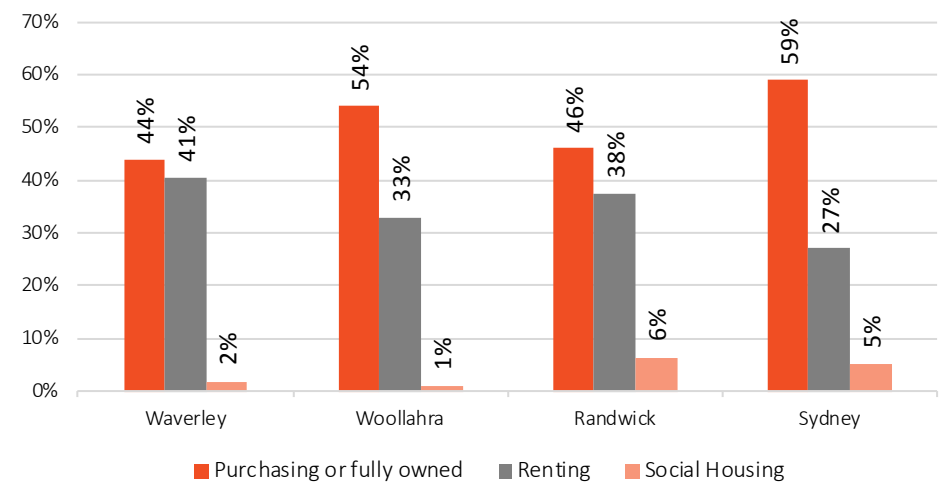
houses. Moreover, the attraction of Bondi Beach and the Waverley lifestyle for overseas travellers and workers lends itself to a more transient population that is more likely to rent. This is evident where there is a much higher rate of rental properties in the Bondi basin (Bondi, Bondi Beach and North Bondi) and Bondi Junction compared to higher rates of home ownership and mortgage holders in Dover Heights, Rose Bay, Queens Park, Waverley and Bronte.

Figure 19 - Dominant housing tenure, Waverley.



Source: Profile ID 2018.

Figure 20 - Dominant housing tenure in Waverley, Woollahra, Randwick LGAs



Source: ABS Census 2016.  
Note: total does not add up to 100% as ‘Other tenure types’ and ‘Not Stated’ has been excluded.

6.2.5 Summary

The Waverley LGA is an established area with residential development starting in the 1800s. The Waverley Architectural Mapping Project revealed that there are examples of properties from the Colonial, Victorian, Federation, Inter-war, Mid 20th Century, Late 20th Century and 21st Century architectural styles. Certain styles coincide with a specific architectural style, e.g. federation terraces, 21st century residential flat buildings that talk to different periods throughout Waverley’s history that influenced development at the time.

Primarily due to the housing booms of the inter-war period and more recently, the last twenty years, Waverley has a significant proportion of apartments, making it the second dense LGA in Sydney. Apartments make up 66% of Waverley’s current dwelling stock, conversely, separate houses have decreased from 20% to 15% in the same period.

Waverley has a high proportion of renters. The higher proportion of renters is most likely the result of the predominant household types – for example, younger demographic, more group homes, less couples with children and transient population of working visitors compared to the Sydney average – and a higher percentage of apartments that are traditionally more likely to be rented than detached and semi-detached houses.





### 6.3 Demand

This section looks at the future demand for housing based on the NSW Government’s population projections and implied dwelling requirements. It also delves further into the likely future demand for housing for particular needs.

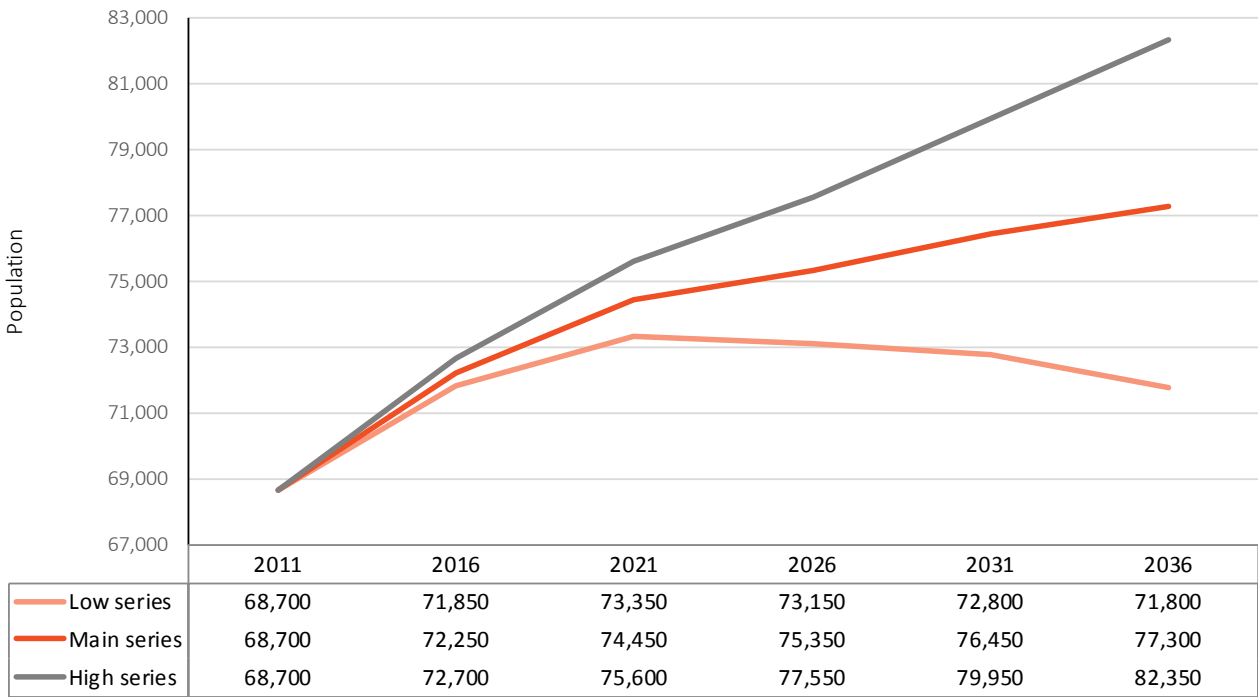
#### 6.3.1 Population projections

The NSW Government’s latest released population projections outlines several scenarios for each LGA in NSW. The projections include a ‘main’ projection, as well as ‘high’ and ‘low’ scenarios based on different assumptions on births, deaths, life expectancy and migration. The projection for Waverley shows an increase in population to 77,300 people by 2036; an annual average increase of 0.5%. The high projection outlines an increase in population to 82,350, while the low projection outlines a decrease in population to 71,800 people, most likely due to shrinking household sizes and affordability.

Waverley’s demographic profile is also expected to change over the next 20 years to 2036 (Figure 20). The number of school aged (5 to 19 years) and over 45 year olds is expected to increase, while those aged 25 to 39 are expected to decrease. This would reflect an increase in the number of families (which has been on an increasing trajectory since 2001) and overall balancing out of the current spread of age groups.

All household types, except group households, will experience growth between 2016 and 2036. Figure 21 shows that from the base level in 2016, single parent households will experience significant growth of 28%. However, in the context of change amongst all households, lone person households make up 56% of the total increase in households (Figure 24). This is followed by couple with children households (24%). The total forecast household change is approximately 90% of the projected implied dwelling requirement; this assumes the current 90% occupancy rate

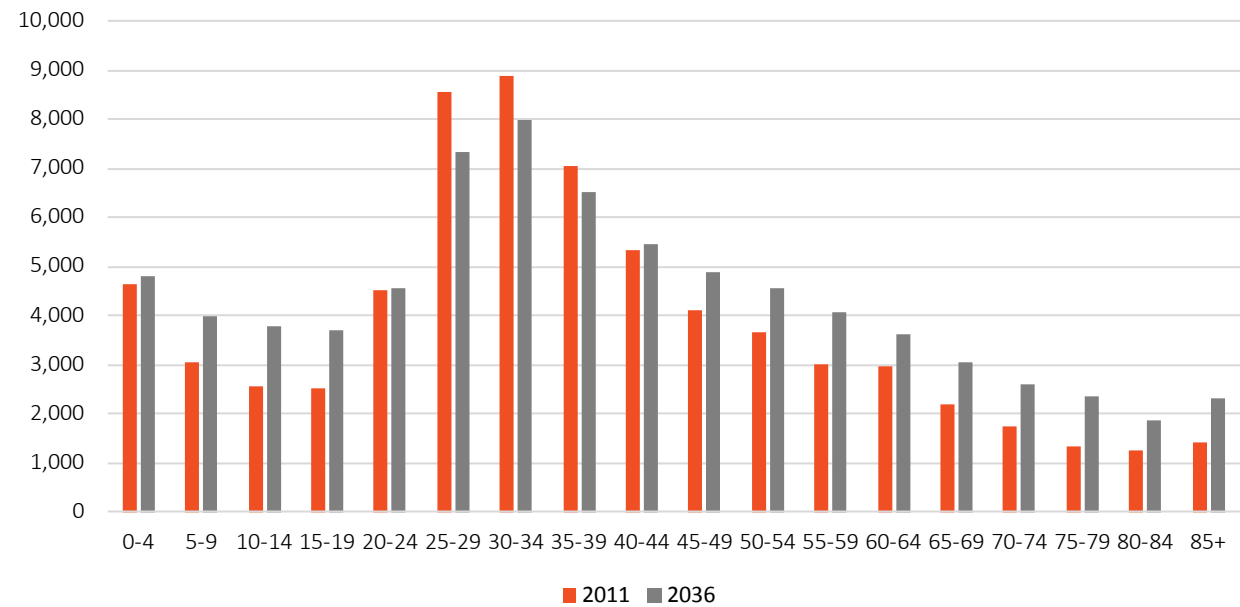
Figure 21 - Population projections, Waverley



Source: DPIE, ‘LGA Population Projections’, 2016.

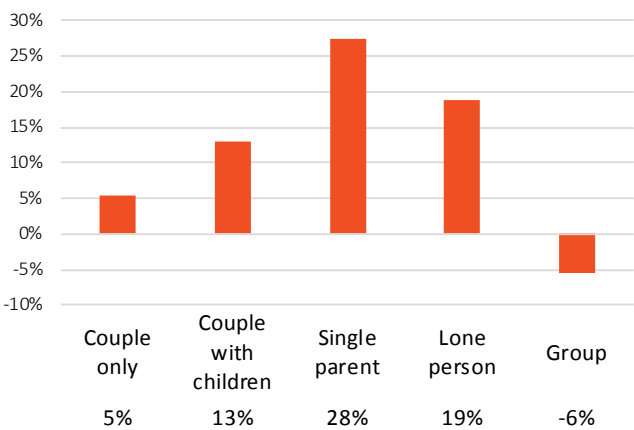


Figure 22 - Population age profile projection, Waverley



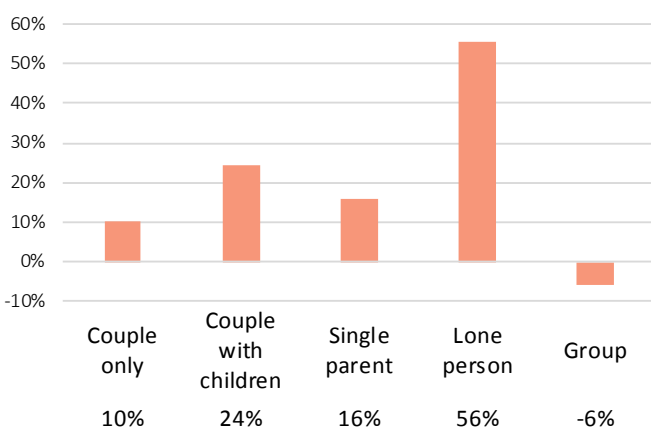
Source: DPIE, 'LGA Population Projections', 2016.

Figure 23 - Forecast % change in household types, Waverley 2016-2036



Source: DPIE, 'LGA Population Projections', 2016.

Figure 24 - Proportion of household growth, Waverley 2016-2036



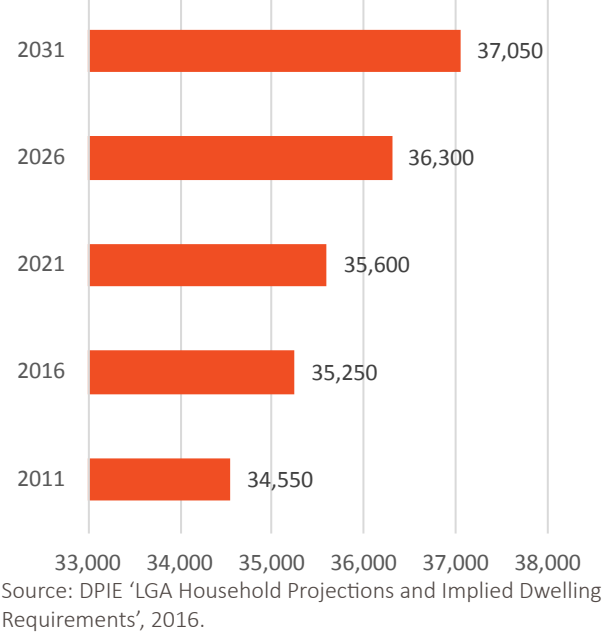
Source: DPIE 'LGA Household Projections and Implied Dwelling Requirements' 2016.  
Note: Multiple family and other family types are excluded as they make up a small number of total households.

6.3.2 Projected implied dwelling requirement

The NSW Government have provided implied dwelling requirements for Waverley based on future household composition. The implied dwelling requirement is devised from extrapolating how many dwellings would be required for the projected number of households. It assumes no changes in living arrangements and occupancy rates, except for factoring in the trend of adult children living at home longer because of increased participation in tertiary education and growing costs associated with home ownership.<sup>8</sup> To this extent, the implied dwelling requirement is a 'top down' demand driven number (i.e. the expected future demand for dwellings), created by extrapolating macro-level trends across NSW and Greater Sydney and applying these to Waverley.

The projection outlines growth of approximately 2,500 dwellings over the next 20 years (2016-2036); an average rate of 125 dwellings per annum. This is slightly above the historical approvals rate of

Figure 25 - Projected implied dwelling requirement, Waverley



Source: DPIE 'LGA Household Projections and Implied Dwelling Requirements', 2016.

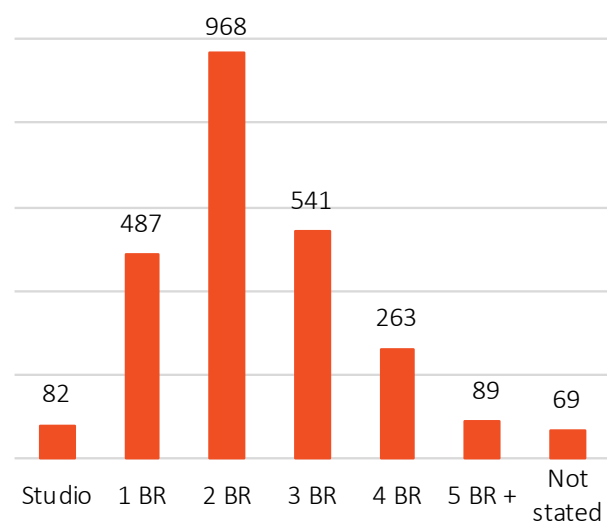
<sup>8</sup> Department of Planning, Industry and Environment 2019, 'Household projections user guide'.

approximately 120 dwellings per annum, excluding the recent apartment supply in Bondi Junction (see Section 6.4). The projections assume an implied requirement for 700 dwellings between 2016 and 2021.

6.3.3 Bedroom number projection

The NSW Government's latest released population By extrapolating the existing household-to-bedroom number relationship, and applying the 90% occupancy rate, there is expected to be greatest demand for two bedroom dwellings (968 or 39% of future demand), followed by three bedroom (541 or 22% of demand) and one bedroom dwellings (487 or 19% of future demand) (Figure 26). However, again this data is skewed by the existing stock and does not necessarily reflect underlying demand for future housing, which may favour greater diversity of family housing.

Figure 26 - Dwelling projection by bedroom, Waverley 2011-2036



Source: DPIE 'LGA Household Projections and Implied Dwelling Requirements', 2016. Note: Multiple family and other family types are excluded as they make up a small number of total households.



6.3.4 Housing for particular needs

It is important to consider a more detailed level of demand analysis looking at particular needs that require a specific kind of housing stock. Often, this demand is not met by the market therefore the planning system needs to intervene to ensure that the delivery of better suited housing can be facilitated. In other words, that ‘underlying demand’ is met rather than just ‘effective demand’, which can simply represent the most profitable housing product.

Adaptable and accessible housing

The NSW Government’s latest released population In Waverley, 3% of the population reported needing assistance with core activities. The number of people requiring assistance notably increases as the population ages where 17% of those aged over 65 years old and 85% over people aged 85 years old and over reported needing assistance with core activities.

There are existing policies and guidelines in effect to facilitate adaptable and accessible housing. The *Disability Discrimination Act 1992* makes it unlawful to discriminate against a person with a disability regarding the provision of access to public buildings for the provision of goods and services, accommodation and employment unless this would cause ‘unjustifiable hardship’. This primarily has an impact on vehicular and pedestrian access in and around new development. In relation to the design of new dwellings, the DCP requires 20% of dwellings in developments with 10 or more dwellings to be adaptable units in accordance with the Australian Standard AS 4299-1995 Adaptable Housing. It requires that all new dwellings (excluding detached housing and other low density residential) comply with the silver level of the *Liveable Housing Design Guidelines*. Purpose built housing for people with a disability is facilitated by *State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004 (Seniors Housing SEPP)*. This is explored further in the next section.

<sup>9</sup> Waverley Council 2016, ‘Research Report: The support and accommodation needs of older residents and the anticipated impacts of aged care reform’.

<sup>10</sup> Department of Infrastructure, Planning and Natural Resources (DIPNR). 2004, ‘A guide for councils and applicants, Housing for seniors or people with a disability, p.6.

Seniors housing

The population in Waverley aged over 65 years is projected to increase by 38% by 2036 to a total of approximately 8,800 residents.<sup>9</sup> This represents 11% of the projected population. With this increase, the need for additional community health and aged care services and seniors residential facilities in the LGA is likely to increase. The allocation for aged care residential facilities set by the Australian Government is 80 beds per 1000 people for population aged over 70 years.

The demand for these services however is not isolated to Waverley residents, and facilities that address this need will help to serve the population of the Eastern Suburbs and Inner City. Table 1 outlines the projected demand and increase of Residential Aged Care (RAC) beds to 2036. This reveals a projected shortage of 1,880 RAC beds and 1,446 Independent Living Units (ILUs) in the Eastern Suburbs alone assuming there is no new net additional seniors housing (both RAC and ILUs).

Planning for seniors housing is an important consideration as the demand for aged care continues to grow. The governing legislation for seniors housing is the Seniors Housing SEPP. The assessment of new seniors housing also needs to consider *State Environmental Planning Policy 65 – Design Quality of Residential Apartment Development (SEPP 65)* and associated *Apartment Design Guide (ADG)*, BASIX, Section J of the *Building Code of Australia (BCA)* and *Seniors Living Policy: Urban Design Guideline for Infill Development*.<sup>10</sup> These policies and guidelines facilitate a spectrum of seniors housing typologies including residential care facility, hostel, group of self-contained dwellings (includes independent living units) or a combination of these.

State level policies override local planning instruments which has led to challenges with ensuring new seniors housing is consistent with what would be permissible under local controls. The SEPP overrides local planning instruments, namely by allowing

Table 1 – Projected seniors housing demand in Randwick, Waverley and Woollahra LGAs to 2036

Year	Population aged over 70	Demand	Supply – demand gap
Aged Care Demand - Currently 1,200 (beds)			
2016	25,300	2,176 (beds)	Current Shortage 976 (beds)
2036	38,500	3,080 (beds)	Projected Shortage 1,880 (beds)
Independent Living Unit (ILU) Demand			
2016	25,300	1,442 (dwellings)	

greater heights and floor space ratio standards. This inconsistency is more prominent when allowed on RE1 and RE2 sites with registered clubs, as it leads to a loss of recreation space and out of character development (see appendices for the application of the SEPP to Waverley LEP 2012 land use table). This is because seniors housing cannot compete with typical residential land uses on residential zoned sites. It is important that the planning system can facilitate appropriate housing in a way that is consistent with local character and doesn’t compete with other important uses. Other Councils have sought to address this through zone objectives (where the SEPP allows seniors housing), for example:

- Sutherland Shire LEP 2015 – R2 zone objective “to ensure the single dwelling character, landscaped character, neighbourhood character and streetscapes of the zone are maintained over time and not diminished by the cumulative impact of multi dwelling housing or seniors housing”
- Sutherland Shire LEP 2015- R3 zone objective “to encourage the supply of housing that meets the needs of the Sutherland Shire’s population, particularly housing for older people and people with a disability”.

The NSW Government are encouraging Councils to review how the seniors housing SEPP applies to heritage conservation areas. In February 2019, an amendment was made so that the Seniors Housing SEPP does not apply in Heritage Conservation Areas in Greater Sydney until 1 July 2020 to allow Councils to undertake their local strategic planning work.<sup>13</sup>

This is an opportunity to undertake a broader review on identifying future sites where seniors housing is currently permissible and opportunity sites where it would be most suitable.

Demand for diverse bedroom mix

Waverley is physically constrained in the diversity of dwelling types it can cater for, given the lack of undeveloped land, therefore future growth will be dominated by apartments. ‘Effective demand’ has led to the provision of one and two bedroom apartments, as these are the most profitable product for a developer, with a strong depth of demand. Three plus bedroom apartments are more typically delivered as a luxury product and are less in demand. Notwithstanding, given the propensity for families to locate and stay in the area, there is and will be increasing ‘underlying demand’ for a diverse offering of two and three bedroom apartments.

There is potential to meet seniors housing demand by diversifying bedroom mix in new apartments. Apartments and granny flats are growing as a popular housing choice for older people downsizing. A recent report by AHURI also found that for around half of its 2,400 survey respondents (who were all aged over 55), three was the most popular number of bedrooms, although two bedroom housing became more popular for people aged over 75 .<sup>14</sup>

<sup>13</sup>Department of Planning, Industry and Environment 2019, ‘Housing for seniors or people with a disability,’ accessed 13 November 2019, < <https://www.planning.nsw.gov.au/Policy-and-Legislation/Housing/Housing-for-Seniors-or-People-with-a-Disability>>.

<sup>14</sup>James, A, Rowley, S, Stone, W, Parkinson, S, Spinney, A & Reynolds, M 2019, ‘Older Australians and the housing aspirations gap,’ Australian Housing and Urban Research Institute.



Downsizing.com.au, an over 55s housing portal, also completed a survey of 600 subscribers which found that 32% of respondents considered “urban convenience” as important criteria for choosing where to downsize.<sup>15</sup>

There may also be future unmet demand for larger apartments that cater to families with children.

Almost a quarter of Australian families now live in apartments<sup>16</sup> as they similarly value having access and living within proximity to amenities such as parks, beaches and public transport. Families with children currently make up a smaller proportion of household types in Waverley, compared to Greater Sydney but this is expected to make up 24% of total household growth to 2036. Recent apartment delivery in Waverley – comprising predominantly one and two bedrooms – are not always suited to families with children or larger households.

There are currently no controls relating to bedroom mix in the DCP. If this continues to be left to the market, then there is potential that there will be insufficient housing suited to families or older people wanting to downsize who may be priced out of the area. Providing alternative housing options, such as larger apartments, will help to cater to underlying demand and the demographic mix of the LGA as it continues to change.

6.3.5 Summary

NSW Government’s latest released population projections indicate that there could be an increase of 5,050 residents (2016-2036). Their implied dwelling projections (how many dwellings are needed to accommodate the projected population) for Waverley are for approximately 2,500 dwellings over the next 20 years (2016-2036); an average rate of 125 dwellings per annum.

<sup>15</sup>Urban Developer 2019, ‘Smaller homes driving unmet downsizer demand,’ accessed 22 November 2019 from The Urban Developer.  
<sup>16</sup>Petersen F 2018, ‘Apartment living is now a fact of Australian life. Meet the families going up, not out’, ABC News, accessed 15 November 2019, <<https://www.abc.net.au/news/2018-08-08/apartment-living-families-in->

The diversity of future housing is in part, defined by dwelling size and the number of bedrooms. There is expected to be greatest demand for two bedroom dwellings (968 or 39% of future demand), followed by three bedroom (541 or 22% of demand) and one bedroom dwellings (487 or 19%). This highlights the importance for a range of bedroom mix in new developments as Waverley will have to facilitate the projected growth in families, older people downsizing (requiring two bedrooms or more) and lone person households (requiring studio and one bedroom).

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There is currently and will continue to be demand for housing to meet particular needs. From a physical need, 3% of the Waverley population reported needing assistance with core activities increasing to 17% of those aged over 65 years. There will also be further pressure on the demand for seniors housing as the population over 65 years is expected to increase by 38% to 2036. This reiterates the importance of mandating enough adaptable and accessible housing options or more higher level care where required. Further work will need to be done understanding where the seniors housing SEPP is most appropriately applied in the LGA, including a broader review of the LEP zone objectives to ensure future development is consistent with local character.

6.4 Supply

Ahousing supply analysis has been completed to understand recent and future housing supply trends to compare these to projected demand. A capacity assessment looks at the capacity, and land use opportunities and constraints through a suitability analysis of the Waverley LGA.

Overall, the supply assessment presents recent supply trends and how these correspond to existing residential settlement patterns, their relationship to demand and implications for future policy directions.

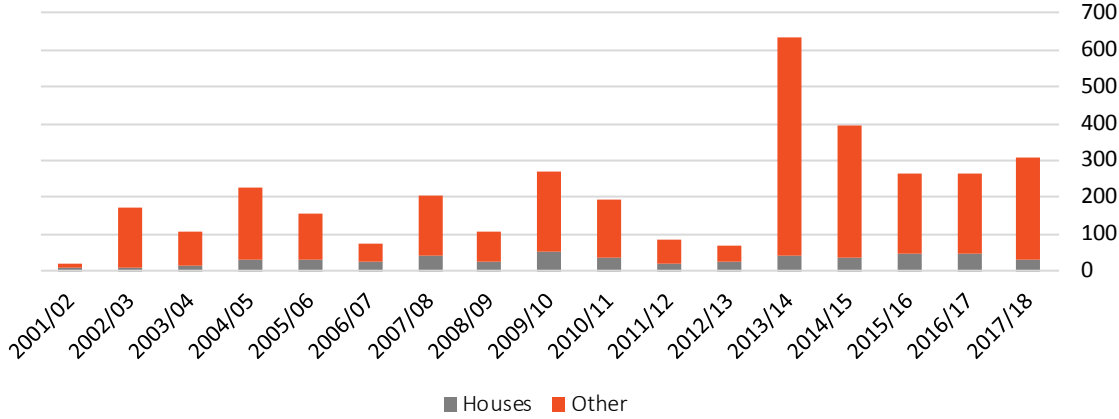
6.4.1 Recent supply trends

Areview of recent dwelling approvals in Waverley show that there have been fluctuations in approvals – likely driven by large development sites – with an average of approximately 120 dwellings approved per annum since 2001 (excluding the fluctuations in supply from Bondi Junction). From the 2013/14 financial year, approvals have increased dramatically, peaking at 643 dwellings, driven by several large tower approvals in Bondi Junction (Figure 24). The ‘other’ category represented in the graph includes non-detached forms of housing and is likely to be mostly comprised of apartments.

The dwelling supply over the past five years has been split by bedroom numbers and suburb. One bedroom apartments are the most prevalent bedroom type being supplied across Waverley (43%), followed closely by two bedroom apartments (40%). One bedroom apartments are the predominant type in Bondi Junction, which also has a higher share of studio apartments than the rest of Waverley. Conversely, Bondi Junction has the lowest proportion of three bedroom plus apartments in Waverley. The northernmost suburbs of Vaucluse and Dover Heights as well as Bronte and Tamarama have a much higher proportion of two and three bedroom dwellings than the rest of Waverley; albeit off a relatively low base (Figure 29).

Effective demand is what is being delivered by the market. There is demand from investors and smaller households, particularly in Bondi Junction, that makes it more profitable to provide smaller apartments. Anecdotal evidence shows that where three bedroom apartments are provided, they tend to be a ‘luxury’ product such as large penthouses. The population projections show that second to lone person households, family households will make up the greatest proportion of growth. This underlying demand may not be met by the current supply trends in the market.

Figure 27 - Residential building approvals, Waverley



Source: ABS, Building Approvals Cat. No. 8731.0.

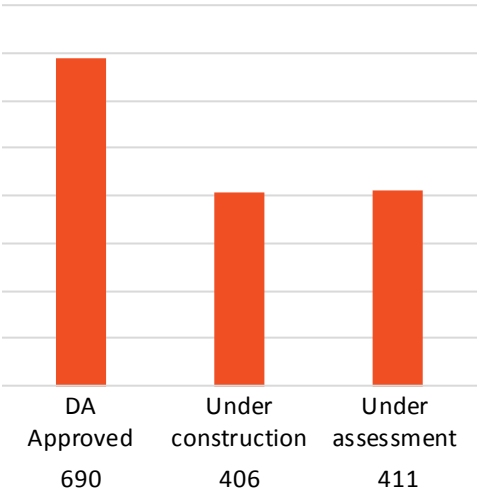


6.4.2 Supply pipeline

The future supply pipeline takes into account current residential developments that are either under construction or approved, as well as future likely development under current zoning and planning controls. The forecasts reflect current trends in residential construction and approval activity. Between 2019/20 to 2023/24, the forecasted supply pipeline is 1,300 dwellings. Majority of this will come from the B4 mixed use zone in Bondi Junction.

There is a large supply pipeline of developments in Bondi Junction expected to be delivered in the coming years. Figure 28 shows that there are approximately 406 apartments under construction and another 690 apartments in the pipeline as approved, but construction has not commenced and 411 apartments under assessment totalling approximately 1,500 apartments in the Bondi Junction supply pipeline. It is difficult to determine when this will be delivered given the fluctuations in building activity.

Figure 28 - Bondi Junction supply pipeline



Source: Cordell Connect, 2016.

6.4.3 Seniors housing

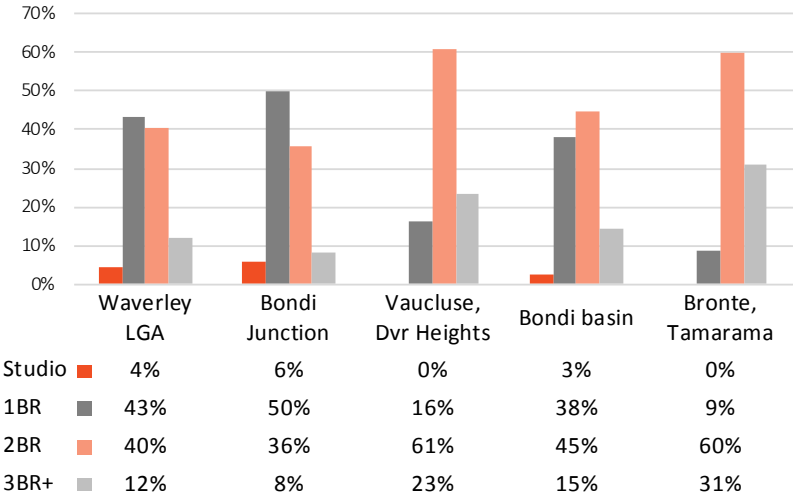
NSW the Eastern Suburbs there are 35 dedicated seniors living facilities offering 2,000 beds from independent living units to higher levels of aged care in Waverley, Randwick and Woollahra. According to the latest housing supply data from NSW Government, there are 103 seniors housing units in the supply pipeline. The Seniors Housing SEPP provides planning incentives for the provision of seniors housing by allowing greater floor space and height controls than what is permitted in the LEP.

6.4.4 Supply trends

Short term rental accommodation (STRA)

There has been an increase in the use of private dwellings for short-term stays, manifest in the increasing ubiquity of online platforms such as Airbnb. Sydney is the 10th largest Airbnb market worldwide with listings concentrated in and around the Sydney CBD and the northern and eastern beaches.

Figure 29 - Residential building approvals, by bedroom and suburb



Source: Cordell Connect, 2016.

Airbnb offers around 5,500 listings in Waverley, representing around 8% of total housing stock in the LGA. While only the City of Sydney has more Airbnb's than Waverley, as a percentage of total housing stock Waverley is the most penetrated market in Australia for Airbnb. At a suburb level, Tamarama has the highest percentage of dwellings listed on Airbnb in Australia, with one in five dwellings listed on Airbnb. The top four suburbs in Australia with the highest proportion of dwellings rented on Airbnb are in Waverley LGA (Tamarama, Bondi, North Bondi and Bronte); most of which are 'entire home' listings. It should be noted however, that most listings on Airbnb in Waverley are not available to rent all year round. STRA has a number of impacts including housing affordability, displacement of long-term local residents, residential amenity and business impacts.

There is increasing concern surrounding the impact of STRA on local housing markets, particularly its effect on rental levels. This impact, as well as the displacement of local residents, was the driving force behind a 'crackdown' on Airbnb and similar forms of STRA in Northern Europe and North America. In terms of the local impacts in Waverley, the number of entire dwellings listed on Airbnb is 350% higher than the residential vacancy rate of Waverley; constraining the supply of permanent rental housing and placing pressure on rents.

Low rise medium density housing code

The Low Rise Medium Density Housing Code allows one and two storey dual occupancies, manor houses and terraces to be carried out under a fast track complying development approval so long as it complies with all the relevant requirements in the *State Environmental Planning Policy (Exempt and Complying Development Codes) 2008*. In the 2018/19 financial year, only one complying development certificate has been approved under the code in Waverley. It was for a dual occupancy in Dover Heights. The concern with the code is that it allows development that is inconsistent with local planning controls.

Local character statements

In March 2019, the Department of Planning, Industry and Environment (DPIE) released draft guidelines for the implementation of Local Character Statements and Overlay. Local character is what makes an area distinctive. It is the translation of land use and built form, the local economy, public realm and private spaces and the tradition and history of Aboriginal and non-Aboriginal cultures, intrinsically linked to individual places.<sup>17</sup> The purpose of the statements and overlay is to elevate the consideration of local character in the assessment of new development. Council will pursue this work to identify areas of local character and create associated statements. The local character work should inform where the medium density housing code should not apply in the LGA.

Sensitive alterations and additions

Given the diminishing availability of lower value sites there is increased pressure to replace high value residential uses with even 'higher' value residential uses and densities. This trend is occurring in Waverley where houses are replaced by apartments and existing apartment complexes are further developed with additional apartments through alterations and additions.

This is pertinent for Inter War and older residential flat buildings. Adaptive reuse comes in the form of rooftop additions, either for additional rooms for the top level occupants (Figure 30), or whole new apartments (Figure 31). Rooftop additions are seen as an emerging market that are increasingly being used by the existing body corporate to pay for upgrades to the building. The additional level can often exceed development standards.

There are also different approaches to the design of these additions. Council has supported cohesive alterations that maintain the core form and articulation of the original building. Some additions are more subtle whereas others are more imposing (and potentially diminish / overwhelm the character existing building).

<sup>17</sup>NSW Department of Planning, Industry and Environment 2019, *Draft Local Character and Place Guideline*.



**Figure 30** - Rooftop addition, Brighton Boulevard, Bondi Beach



Source: Google Streetview 2019.

**Figure 31** - Rooftop addition, Ramsgate Avenue, Bondi Beach



Source: Google Streetview 2019.

**Figure 32** - Rooftop addition, O'Brien Street, Bondi Beach



Source: Google Streetview 2019.



### 6.4.5 Sustainable housing

Sustainable housing can meet the needs of today without compromising the needs of future generations. It does this by maximizing quality and affordability and fostering optimal use of materials, water and energy resources, while ensuring adaptability and resilience to demographic and environmental changes.

#### Old Building Stock

Waverley is a densely populated area, with older residential building stock in the form of walk-up flat buildings, large multi-unit dwellings, terraces, manor homes, dual occupancies, and detached dwellings. A large amount of development, particularly in heritage conservation areas and any future character areas is likely to involve mainly alterations and additions to existing buildings.

The BASIX SEPP aims to make all residential dwelling types in NSW energy and water efficient by mandating that all new residential buildings and alterations and additions with a cost over \$50,000 meet BASIX requirements. The BASIX standards represent the minimum acceptable level of water and energy efficiency, but the tool does not encourage exceedance of these targets or promote innovative design solutions which could create more sustainable buildings. Furthermore, the BASIX Alterations and Additions standards can only affect improvement to the new/alter component of the dwelling. This means that Council does not have an effective planning mechanism to improve efficiency of the majority of the building stock within Waverley. Maintaining existing building stock and upgrading the building systems to be more efficient is the most sustainable option for improving the performance of Waverley's building stock, as the embodied carbon already contained within the building is maintained.

Council has written to the Minister for Planning and Public Spaces to ask for a review of the BASIX standards. Waverley Council is working with other

councils in the Eastern City District to help provide evidence and data to support a district wide, or precinct-based approach to raising the minimum BASIX standards.

Beyond BASIX, Council has successfully implemented the Building Futures program which works with Strata Corporations of buildings around the LGA to review the current performance of the building and find ways to improve the energy and water efficiency throughout the building.

Waverley Council could explore a mandatory whole-of-house energy & water rating scheme with minimum performance standards, which could be triggered at point of sale or point of lease. This would ensure that the existing housing stock is retrofitted, ensuring comfortable, affordable and sustainable housing for all Waverley residents.

#### Water security

Sustainable Homes reduce water use and minimize the impacts on stormwater and wastewater. Water resources are expected to decline with changes to rainfall patterns accompanying climate change. As populations grow, so do pressures on water use. Australia is the driest populated continent on earth, and yet Australians are the greatest per capita consumers of water in the world.

Conserving water resources, even in areas without shortages, helps reduce the need to build dams, protects river health by reducing the need to extract water, lowers energy requirements for treating and transporting water and wastewater, and reduces greenhouse gas emissions. Managing surface runoff and stormwater pollution helps to minimize impacts to streams and beaches.

#### Energy

Emissions from residential energy consumption accounts for around 20% of Australia's greenhouse gas emissions. The average household generates over 15 tonnes of greenhouse gas emissions every year from energy used for heating and cooling, hot water, as well as lighting and other electrical appliances.



A Sustainable House reduces household energy consumption by applying passive heating and cooling design principles, utilising energy efficient appliances such as LED lighting and solar hot water heaters and providing on-site renewable energy through a roof top solar PV system. Modern Sustainable Houses may also utilise a battery to store excess solar electricity that can be used later in the evening – perhaps to charge an electric vehicle, or to be able to trade with other users on a micro-grid. The emergence of roof-top solar, battery storage, and electric vehicles is changing the picture of the home from an energy consumer, to an energy “prosumer”. As electricity network regulations evolve and household electricity metering technologies improve, sustainable homes will become more interconnected with the electricity network – helping to balance electricity demand across the grid, and in the future, potentially enabling Sustainable Houses to sell excess energy to their neighbours.

**Biodiversity**

The loss and destruction of biodiversity and habitat is an increasing issue across NSW. Trees, vegetation and habitat corridors are crucial for the survival of native fauna. Residential and street trees increase property values as well as providing ecosystem services such as habitat, cooling and reductions in storm water peak flows, and also psychological relief from stress. A Sustainable House supports local biodiversity through vegetation and deep soil zones.

**Urban Heat Island Effect**

Waverley is highly urbanized. The Urban Heat Island effect is caused by the absorption of heat into the surfaces of roads and buildings in our built up areas, amplified by the reflection of light from reflective buildings onto surfaces that absorb the extra heat. This combination leads to our built up areas becoming and staying hotter than an environment that has a lot of natural surfaces (vegetation) and shade. A sustainable house does not contribute to the Urban Heat Island effect by using materials that reflect heat, and by providing adequate tree canopy and vegetation for shade, as well as deep soil areas rather than paved areas.

**Climate Change**

Climate change presents a threat multiplier to existing natural hazards in Waverley. Projected impacts of climate change in Waverley include an increase in the severity of storms, increased number of hot days per year, and reduced water availability. A sustainable house is resilient to increasing natural hazards

**6.4.6 Land use opportunities and constraints**

This section provides an understanding of the LGA and its development context by identifying the opportunities and constraints (including physical and environmental circumstances), which may influence where development occurs. The purpose of this analysis is to understand where future housing supply is likely to occur. This was informed by a suitability mapping exercise that layered the opportunities and constraints and cross referenced with capacity mapping.

Opportunity areas are those that have the highest amount of residential amenity. It reveals those areas that are the most ideal locations – all other things being equal – for new housing in the LGA. To identify areas of residential amenity, attributes have been identified that have a positive association with amenity/liveability. These attributes include access to:

- Open space including beaches, regional open space (Centennial Park), district open space (Waverley and Queens Park) and pocket parks.
- Village centres
- Public transport including a train station and bus corridors.

Constraints detail the land, development and planning constraints on the provision of new housing, where properties are considered unlikely to develop or where housing may be restricted under the planning framework.

The Waverley LGA boasts a high level of amenity, with accessibility to the Sydney CBD and world class open spaces and beaches. In the context of Sydney, there are no areas of the LGA that wouldn’t be suitable for housing as there is generally good access to all the opportunities outlined above.

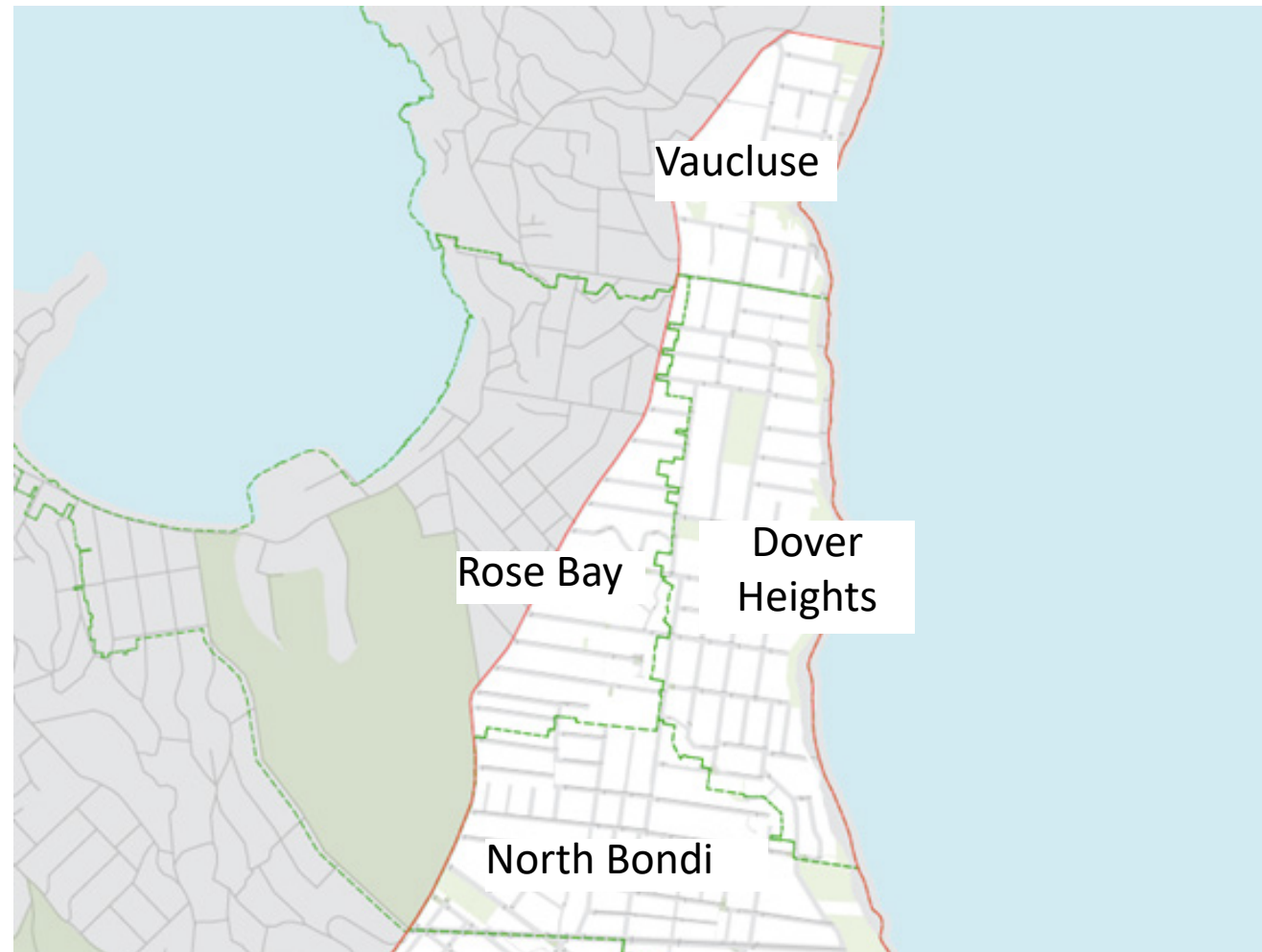


**Figure 33 - Land use constraints**

Absolute Constraints	Relative Constraints
<ul style="list-style-type: none"><li>• Parklands</li><li>• Beaches</li><li>• Heritage items</li><li>• Heritage conservation areas</li><li>• Biodiversity areas</li><li>• Schools</li><li>• SP2 zone</li><li>• Roads</li><li>• Coastal inundation</li><li>• Geotechnical hazard</li></ul>	<ul style="list-style-type: none"><li>• Strata and company title</li><li>• Flood prone</li><li>• Biodiversity habitat corridor</li></ul>



## North of Blair Street - North Bondi, Rose Bay, Dover Heights and Vaucluse



There are a range of land use opportunities in the LGA north of Blair Street that have good amenity, making it attractive for new development and refurbishment of existing buildings.

The key transport corridors are the bus routes that run along Military Road and Old South Head Road with direct access to Bondi Junction and Bondi Beach. There is a good level of accessibility to local parks e.g. Caffyn Park, and district open space, e.g. cliff walks. Essential services are also found in local village centres in Rose Bay and Dover Heights.

With direct access to a public transport corridor, the Old South Head Corridor is relatively suitable for redevelopment. Development opportunities

exist along Old South Head Road, where recent development trends show that 'low hanging fruit' of low scale shop top housing, detached and semi-detached housing have been demolished and rebuilt as residential flat buildings or shop top housing. There is still capacity in Dover Heights and Vaucluse to be realised in this corridor.

There are scattered development opportunities in Rose Bay. This is primarily due to the existing dwelling type of residential flat buildings in Rose Bay. Notwithstanding, there are larger lots with detached housing that could potentially redevelop to have net additional dwellings.

**Figure 34** - Inter-War streetscape, North Bondi



**Figure 35** - Pink lots indicate Inter-War style dwellings (WAMP 2018)



Similarly, sites with development capacity are scattered across Dover Heights. Where a site hasn't been developed in the last 20 years or heavily capitalised, opportunities exist for medium density housing.

North Bondi saw a significant construction boom in the Inter-War years after sand dunes were stabilised north of Bondi Beach. These streetscapes have been modified over time to suit changing household needs, but Inter-War character is still evident as seen in figure 35. Infill development is likely to occur in these areas through alterations and additions to detached, semi-detached and older residential flat buildings.

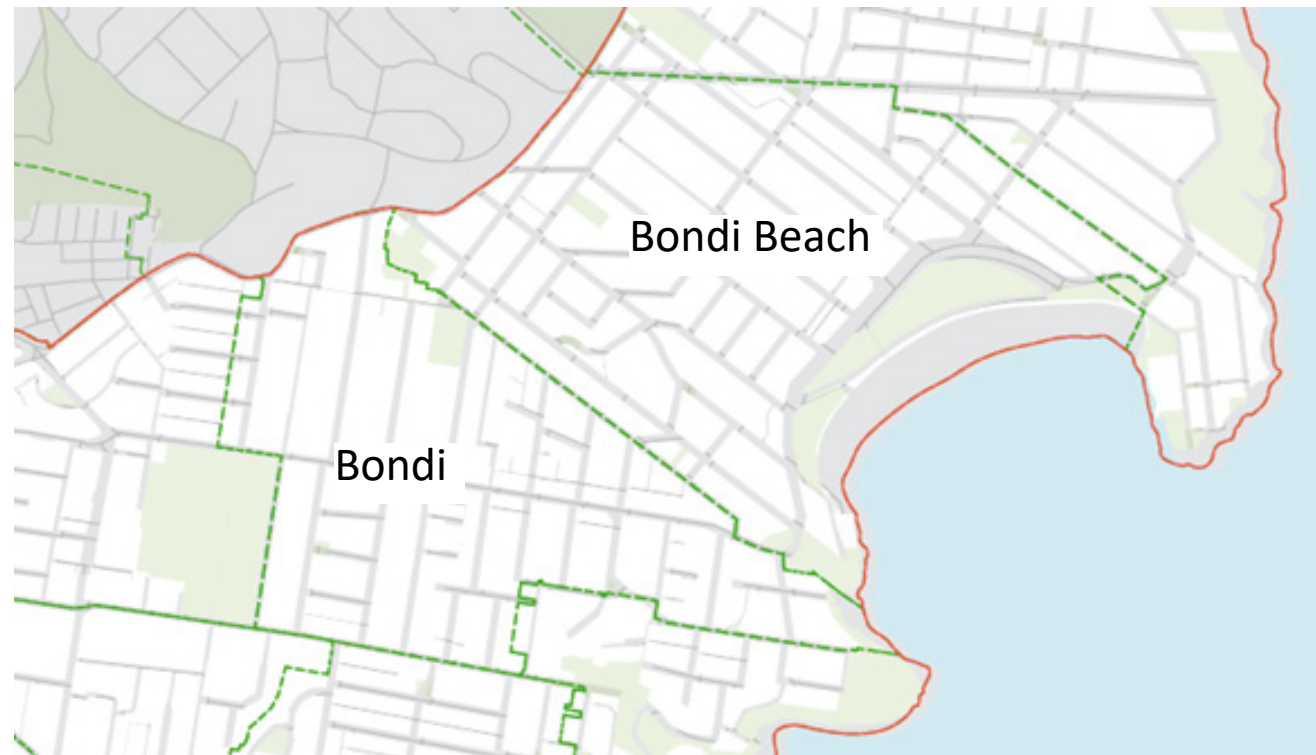
**Figure 36** - Approved residential flat building



Constraints to new development in the area include heritage items, terrestrial biodiversity, biodiversity habitat corridors, coastal management, and scattered nature of viable options for redevelopment.



## Bondi Basin - Bondi Beach and Bondi



The Bondi Basin incorporating the suburbs Bondi Beach and Bondi are the densest areas in the LGA. The prevailing dwelling type are residential flat buildings, with pockets of detached and semi-detached dwellings east of O'Brien Street and south of Bondi Road. There is a distinct Federation and Inter-War character in parts of the Basin as these were some of the last parts of the LGA to be sold and developed.

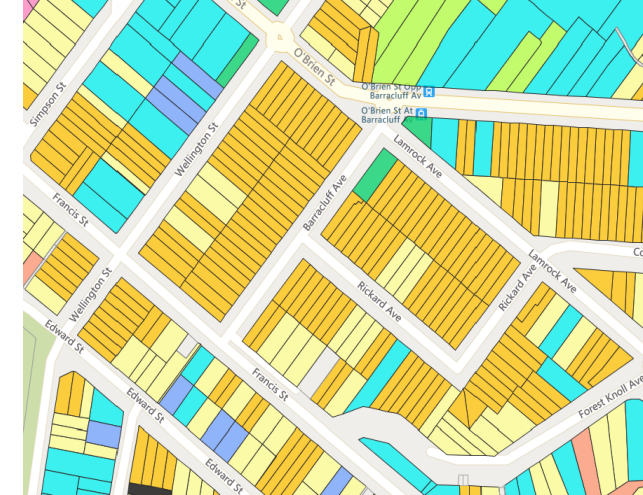
There are significant opportunities in the Bondi Basin that will continue to make it attractive for housing development. Bondi Road to Campbell Parade is a high frequency bus corridor and is also a hub of activity as two of the major village centres in the LGA. Furthermore, the iconic nature of Bondi and the world class beaches, and open spaces make it a destination for visitors and locals to live. The residential parts of Bondi Basin have access to highly sought after amenities, making it an expensive area to rent, purchase, and/or develop.

There are development opportunities of detached and semi-detached dwellings that are within the

R3 zone, varying in height limits of 9.5m to 12.5m. There are clusters of these sites in the eastern and western parts of Bondi Beach with access to the bus corridors on both Campbell Parade and Old South Head Road and in the eastern part of Bondi. Other future development will likely be through alterations and additions to existing semi-detached and detached dwellings and to older residential flat buildings.

The residential areas between Bondi Road and Birrell Street also have some development opportunities under the current controls. It is a tightly held area as there is immediate access to the Bondi Road commercial centre and transport corridor and proximity to Waverley Park and the beaches. Historically, the consistent rows of semi-detached and detached housing were key worker housing for commuters that utilised the tram along Bondi Road. The resultant subdivision pattern has resulted in a narrow lot pattern. This is a constraint to future redevelopment. Additional constraints to development include LEP heritage items and urban conservation areas.

**Figure 37** - Dark yellow lots indicate detached dwellings in Bondi Beach (WAMP 2018)



**Figure 38** - Blue lots indicate residential flat buildings in Bondi (WAMP 2018)





South of Birrell Street – Queens Park, Waverley, Bronte, Tamarama



The suburbs south of Birrell Street include Queens Park, Waverley, Bronte and Tamarama. The area is characterised by institutional, civic and religious uses, particularly around Waverley. There is access to transport connections to Bondi Junction, the CBD and south towards the rest of the Eastern suburbs. Bronte Beach and Queens Park are high quality recreational areas also located within the vicinity. Charing Cross and Macpherson Street are also key village centres that contain essential services for its immediate catchment.

The main constraint to development in these areas are heritage, available land for residential development, and coastal management.

Majority of Bronte and Queens Park are low density residential zones. This reflects the predominance of one to two storey dwellings. Remaining capacity exists on sites with one to two storey dwellings under the current planning controls. Given the low density zoning, this will mainly be utilised through

infill development such as alterations and additions to existing detached and semi-detached dwellings. There are three storey dwellings that would have either ‘maxed out’ or exceeded planning controls concentrated along the coastline in Bronte.

Waverley is zoned R3 residential, and the current FSR and height controls permit three storey building typologies. Waverley is highly accessible with frequent transport options along Bronte Road and Carrington Road. There is a concentration of social and cultural infrastructure in the area as there are several schools (e.g. St Catherine’s, Waverley Public School, Waverley College) and health uses including the War Memorial Hospital. Charing Cross is also a well serviced village centre. Under the current controls, capacity remains on dwellings that are currently one to two storey dwellings.

Tamarama is also zoned R3 residential. The maximum height of building ranges from 8.5m to 9.5m storeys, permitting up to a three storey residential flat

Figure 39 - Blue lots indicate three storey dwellings in Bronte (WAMP 2018)

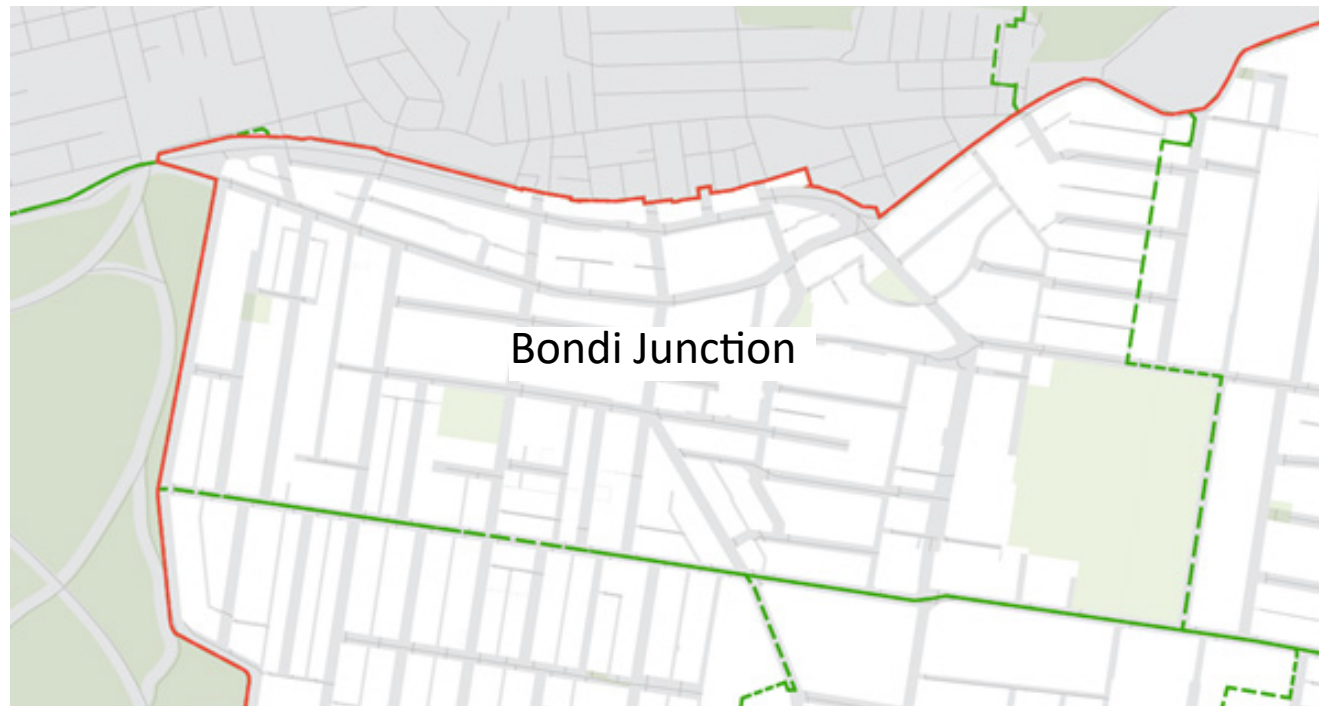


building. This is a highly desirable area where the median rent for a house is three times the average for Sydney. The predominant dwelling typologies include detached, semi-detached and residential flat building typologies (46%, 26% and 15% respectively). Recent development has included the development of large detached housing, alterations and additions to increase the floor space of existing residential flat buildings and construction of new residential flat buildings. This kind of infill development will continue as capacity continues to be taken up.





## Bondi Junction



Bondi Junction has undergone record housing supply as a result of changes to the planning controls which permit mixed use towers. The Strategic Centre is bound by the Mill Hill, Botany Street and Woodstock Street Urban Conservation Areas. There are few remaining sites available for redevelopment. Collectively, the remaining sites could yield up to 200 dwellings. Council is currently preparing the Bondi Junction Urban Design (2011) to understand the implications of recent development in Bondi Junction in the context of the existing planning framework.



## 6.4.5 Summary

Available data that goes back to 2001 shows that approximately 120 dwellings have been approved per annum since 2001. The majority of this is approvals for apartments. After the upzoning of Bondi Junction that allowed for 12 storey mixed use developments in 2010, there was a significant peak in approvals. At the peak in 2013/14, 643 dwellings were approved.

Dwelling supply over the past five years has been comprised mostly of one bedroom (43%) and two bedroom (45%) apartments. This is driven by effective demand from investors and smaller households for one and two bedroom apartments which is also more profitable for developers. There is underlying demand from larger households that may not be met with the way the current market is skewed.

Between 2019/20 to 2023/24, the forecasted supply pipeline across Waverley is 1,300 dwellings. Majority of this will come from the B4 mixed use zone in Bondi Junction. There are approximately 1,500 apartments under construction, approved, and under assessment in the Bondi Junction supply pipeline. It is difficult to determine when this will be delivered given the fluctuations in building activity.

Other forms of housing in the supply pipeline include seniors housing, with approximately 103 units to be delivered over the coming years.

The opportunities and constraints analysis uncover those areas with the highest amount of residential amenity in the context of Waverley. Future supply is likely to come in the form of infill development as there are no large urban renewal opportunities in the LGA and development capacity is scattered. The most opportune areas for development are those located near high frequency transport corridors and recreation. The main constraints include heritage, the high cost of land and strata and company title.

## 6.5 Housing targets

The District Plans provides 0-5 year housing targets (2016-2021) for all Councils. The LHS is required to develop the 6-10 year (2022-2026) and 11-20 (2027-2036) year housing targets. It does not suggest any changes to the planning controls to achieve this housing target.

### 6.5.1 Target development

The District Plan requires that all Councils develop 6-10 year and 11-20 year housing targets. The section outlines the development of a draft housing target. The demand and supply evidence were analysed to develop an appropriate target that accounts for projected demand and historical completions. The points explain the components of the Housing Targets table overleaf:

- Implied dwelling projections – these are produced by the NSW Government based on populations projections.
- Constant share of GSC target –Waverley's share of the 0-5 year District Plan GSC housing target was 2.7%, with 2.4% of this share based on dwelling delivery in Bondi Junction. The dwelling supply during this 0-5 year period was more than double the dwelling completions in the last 20 years. This was mainly due to the large-scale redevelopment of Bondi Junction and redevelopment of large sites across the LGA. This was a unique spike in the number of dwelling completions that won't be repeated in the next 20 years, given that Bondi Junction is nearing capacity and there are no further large urban renewal type sites in the LGA. Therefore, the current 2.7% share of the District Plan target would be unreasonable to apply for the 6-10 years and the overall 20 year target.
- Historic annual completions- assumes that 6-10 year period (2022-26) includes medium term pipeline in Bondi Junction (i.e. dwellings currently under assessment) and the annual average historical take-up rate outside of Bondi Junction. The 11-20 year target is made up of the remaining capacity in Bondi Junction (approximately 200 dwellings) and the annual average historical take up rate of dwellings



Table 2 - Housing Targets					
Target periods	2016-2021	6-10 year	11-20 year	2036 cumulative	Share of District Target
Target development					
Implied projections	700	350	1,450	2500	1.6%
Constant share of GSC target	1,250	993	1,986	4229	2.7%
Historic annual completions	1,250	1,011	1,400	3661	2.3%
Capacity sense-check					
Scenario 1	1,250	734	1,467	3451	2.2%
Scenario 2	1,250	922	1,843	4015	2.5%
Scenario 3 (HMST)	1,250	1,325	2,649	5224	3.3%
Draft Target					
Draft target	1,250	761	1,450	3461	2.2%

Capacity sense-check

The purpose of the capacity sense-check in the table above is to understand Waverley’s capacity to meet a devised target. The 1,250 dwellings is based on existing supply pipeline and the remaining capacity (from above) was spread evenly across the 6-10 year and 11-20 year time periods.

6.5.2 Housing target

A housing target of 3,400 dwellings to 2036 has been derived (Table 2). Of these 3,400 dwellings, 1,250 are already in the supply pipeline to be delivered in the 0-5 year period. This draft target makes up 2.2% of the total Eastern District target and can delivered be met under the current planning controls, even in the most ‘conservative’ capacity scenario one.

- 0-5 year (2016-2021) – existing supply pipeline of 1,250 as outlined in the District Plan.
- 6-10 year (2022-2026) – includes the medium term supply pipeline of 411 dwellings under assessment in Bondi Junction + the NSW Government implied projection for the same period.

- 11-20 year (2027-2036) – NSW Government implied projection.
- A vital piece of the capacity story in Waverley is the existing density. As outlined in the Housing profile Waverley is the second dense LGA in Sydney at 79 people/Ha. In relatively less dense parts of the LGA such as Dover Heights, the population density of 42 people/Ha still places it in the top 5% of most dense SA2s in NSW (30th out of 576 SA2s). This reflects the skew of dwelling types towards apartments where they now make up 66% of housing stock in Waverley. Waverley’s density is apparent when compared to neighbouring and suburban LGAs. Neighbouring Eastern Suburbs councils of Randwick (42 people/Ha) and Woollahra (48 people/Ha), are less dense than Waverley. From a more suburban context, Parramatta (30 people/Ha), Blacktown (15 people/Ha) and Liverpool (7 people/Ha) have much lower densities still.
- Over the last 100 years, Waverley has taken a significant share of dwelling growth, proportionate to the size of the area, across Sydney. This analysis suggests, from a density perspective, there is much more ‘room to grow’ in other LGAs across Sydney and that naturally Waverley’s population projections would continually moderate as Waverley takes a lower share of Greater Sydney’s future population growth.

Beyond being already significantly dense, there are number of additional constraints to any further growth above current capacity. There is only so much ‘low hanging fruit,’ i.e. feasible and profitable sites left, and these have been picked up in the capacity assessment. Once these sites are redeveloped, the high number of existing sites are predominantly strata titled reducing the amount of developable areas. The feasibility of these remaining non-strata areas is limited because much of these are Heritage Conservation Areas, heavily capitalised or in locations where single dwellings attract a higher premium compared to apartments (i.e. some apartment complexes have been converted to single dwellings).

6.5.3 Infrastructure to support housing growth

Initial consultation with State government agencies points to the need for further work on understanding the capacity of local infrastructure. The operation of the existing road network would need to be modelled and analysed to determine the current level of service and would indicate how much spare capacity we have on the road network. This could be used to determine what uplift the road network could sustain if there were no improvements made or if there were localised intersection upgrades etc. to reduce congestion. Travel demand measures such as reduced parking and focussing growth in areas that are well serviced by public and active transport could be used to reduce car dependency and relieve pressure on the road network. Notwithstanding the need for transport modelling to develop a detailed understanding of constraints to growth, TfNSW did not raise any concerns with regards to the capacity of the network to accommodate forecast dwelling growth.

There is capacity in the local water and wastewater systems to accommodate some of the proposed development. However, some upgrades will be required to support the projected capacity. Further planning investigations in consultation with Sydney Water would be needed to determine the required upgrades.

6.5.4 Monitoring housing supply

It should be noted a housing target does not necessarily mean this is how many dwellings are going to be delivered. There is no available land in the LGA for residential uses that is not already built on and there are no significant urban renewal opportunities being led by Council or State Government. Therefore, housing growth will come through as infill development, i.e. in the form of modifications or the demolition and reconstruction of existing buildings. There are wider influences at play that will affect this type of future housing supply. Economic factors such as interest rates, the cost of construction and ability to access financing are largely the drivers behind housing construction activity. Therefore, whilst this strategy has set a ‘target’ as required by the state government, it is out of Council’s scope to encourage the actual take up of existing capacity, i.e. housing construction.

The size and amount of housing supply should continue to be monitored against the housing target. As development capacity continues to be taken up, it may be found that the planning controls do not enable development. This could happen where the existing buildings already exceed current built form controls, or they are inconsistent with desired future character. The take up of capacity should be continually monitored to see how they are tracking against population projections and if housing is meeting the needs of Waverley’s changing community. It may be that in the future, the effectiveness of the planning controls will need to be revisited to enable development where appropriate.





# 7 HOUSING AFFORDABILITY

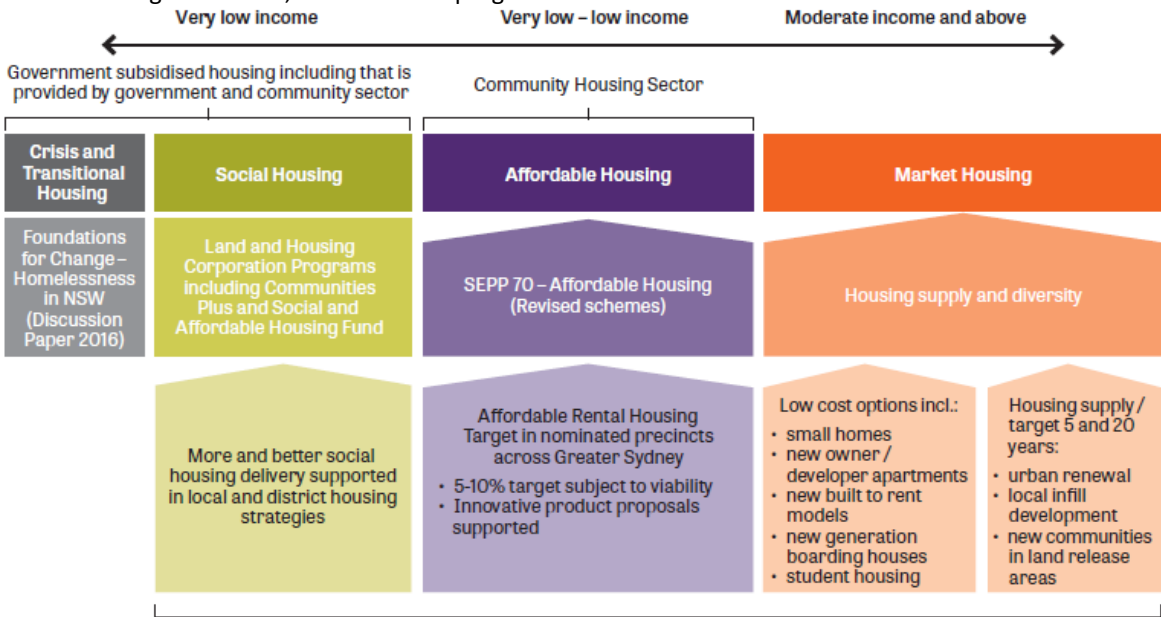
‘Affordable housing’ is often used an umbrella term for a spectrum of affordable housing options. The figure below shows that these options include social housing, affordable rental housing, and certain types of market housing. The following sections will highlight that there is a clear and critical need to improve housing affordability in Waverley. A range of factors contribute to this need, including a combination of rising housing costs, population growth pressures and growing demand for inner-city living, in addition to limited land availability.

## 7.1 Affordable housing

Median household wage growth in Sydney has remained relatively stable, however house prices continue to climb resulting in a widening house price to income ratio. In Waverley the household income to house price ratio has risen from 4 in 1994 to 12 in 2016. The house price to income ratio indicates that Sydney median household income of \$1,750 would need to spend 12 times their annual gross income to purchase the average house in Waverley.

Term	Definition
Affordable rental housing	Housing that is owned by government or a registered community housing provider and rented to a mix of very low to moderate income households.
Housing stress	A household is categorised as being in housing stress where it spends 30% or more of household income on housing costs.
Low cost housing	Housing that is ‘naturally’ more affordable than other stock e.g. older boarding houses, granny flats
Social housing	To qualify for social housing, tenants must be on very low to low incomes, need to support to live independently and/ or have been unable to find affordable housing in the private market. Social housing includes public, community and Aboriginal housing. Public housing is managed by Department of Communities and Justice (DCJ formerly known as Family and Community Services) while community housing is managed by non-government organisations.

Figure 40 - Housing continuum, initiatives and programs

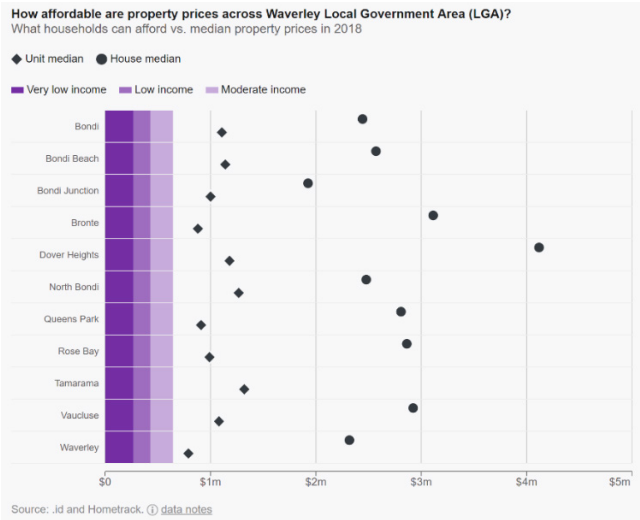


New housing outcomes across the continuum addressed in this Plan

Source: Greater Sydney Commission 2018



Figure 41 - What households can afford vs. median property prices in 2018.



Source: Housing.ID 2019, Hometrack 2018

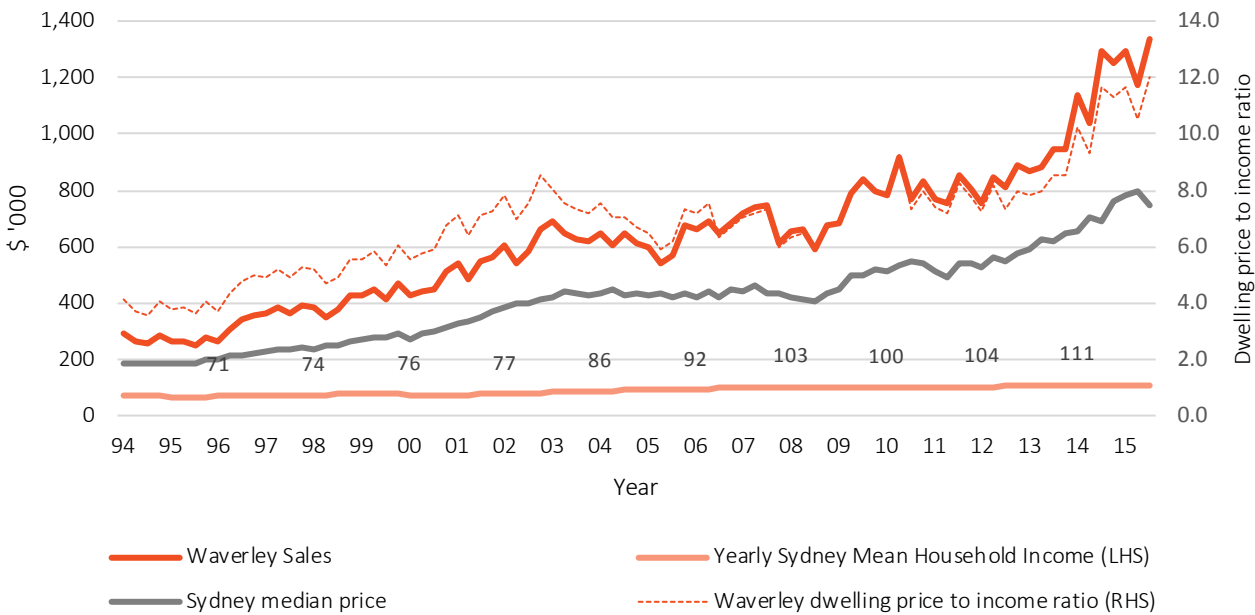
The affordability of housing currently available on the market is based on very low, low and moderate household incomes. The Greater Sydney median household income is used as opposed to the Waverley median household income because Waverley has a higher proportion of high income earners than Greater Sydney.

Median house prices across all suburbs in the Waverley LGA were well out of reach for very low, low and moderate income households in 2018. The purple gradation in the image below shows what very low, low and moderate income earners could afford based on spending 30% of their household income towards a mortgage. The median house price in all suburbs was a significant distance from what would be deemed an affordable mortgage.

Table 3 - Greater Sydney median household income ranges

	Very low income household	Low income household	Moderate income household
Income benchmark	<50% of Gross Median H/H income for Greater Sydney	50-80% of Gross Median H/H income for Greater Sydney	80-120% of Gross Median H/H income for Greater Sydney
Income range	<\$875	\$876-\$1,400	\$1,401-\$2,100

Figure 42 - Waverley house price growth in context



Source: HNSW Rent and Sales Reports 1994-2016 / ABS 1994-2011 Income Data  
Note: Income extrapolated for years after 2011.

<sup>18</sup>Sydney income used to assess the relative affordability against Sydney.

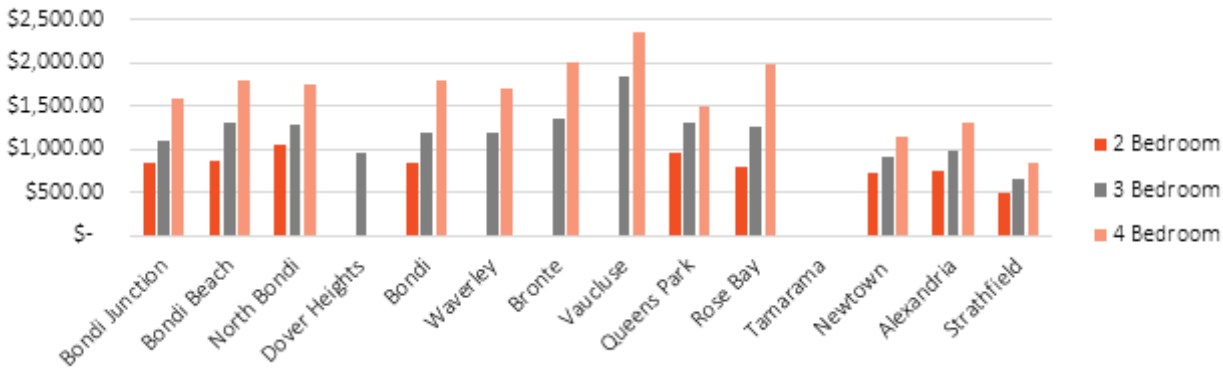
Median unit prices were closer to the affordable purchase range of very low, low and moderate income households but were still above what would be considered affordable. Median unit prices were particularly high, above \$1 million, in beachside suburbs such as Bondi, Bondi Beach, North Bondi and Tamarama.

Waverley's rent (for all dwellings) is 130% higher than the Sydney average. The median rent for a house of \$1,300/week is like the median price in that it is well beyond the affordable rental range. In particular, the disparity between rents in Waverley compared to Greater Sydney are more pronounced for three or more bedroom places. This reflects a high demand for this type of housing product in Waverley.

The median rent for a unit is \$680/week. The median unit rent is likely to be affordable for households on a moderate income. The median unit rent was at the top end of the moderate income affordability range in Bondi Junction, Bronte, Queens Park, Rose Bay and Waverley. When looking at the apartment types by bedroom number, the affordable units were for one and two bedroom apartments. Like rental prices for houses, there is a significant increase in price for three bedroom dwellings. This points to a demand for larger affordable units and the potential forced relocation for those residents who cannot afford these dwellings.

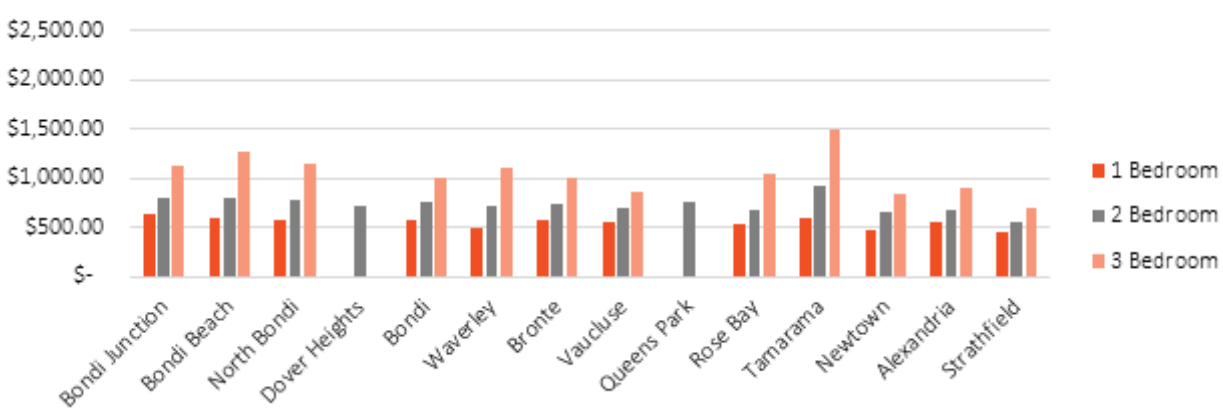
The above analysis highlights how Waverley has become severely unaffordable. This will be exacerbated by fluctuations in available housing supply, as Waverley continues to be a desirable place to live.

Figure 43 - Detached house weekly rental prices comparison – Waverley suburbs vs. Sydney suburbs



Source: Realestate.com. Note: excludes not stated, not applicable, nil or negative responses.

Figure 44 - Unit weekly rental prices comparison – Waverley suburbs vs. Sydney



Source: Realestate.com. Note: excludes not stated, not applicable, nil or negative responses.



Table 4 - Social housing base level demand Waverley, 2016-2036					
	2016	2021	2026	2031	2036
Number of dwellings	510	571	576	588	600

Table 5 - Base level affordable rental housing demand (2016-2036)					
	2016	2021	2026	2031	2036
Number of dwellings	3,438	3,847	3,885	3,962	4,044

Demand for social housing

To qualify for social housing, tenants must be on very low to low incomes, need support to live independently and/or have been unable to find affordable housing in the private market. Social housing includes public, community and Aboriginal housing. Public housing is managed by Department of Communities and Justice (DCJ formerly known as Family and Community Services) while community housing is managed by non-government organisations.

A contributing factor to demand for social housing is homelessness. The ABS recognises a person as experiencing homelessness if they are living in a dwelling that is inadequate; has no tenure, or if their initial tenure is short and not extendable; or does not allow them to have control of, and access to space for social relations. There are six categories of homelessness including persons living in severely crowded dwellings, improvised dwellings, tents, or sleeping out (‘rough sleepers’), in supported accommodation, staying temporarily with other households (‘couch surfing’), living in boarding houses and in other temporary lodgings. Of the 116,427 people counted as being homeless on Census night 2016, the greatest proportion (51,088 or 43.9% of all homeless people) were those living in ‘severely’ crowded dwellings.<sup>19</sup> From the available ABS data for Waverley, 15 people were recorded to be sleeping in an ‘improvised home’, tent or on the street on Census night 2016. This does not capture those in any of the five other homelessness categories described above and likely underplays the extent of homelessness in Waverley. Social housing demand is based on the current share of households who are currently in social housing. As

at 2016, social housing makes up 2% of total dwelling stock in Waverley which equates to 510 dwellings (assuming one household = one dwelling). This proportion is extrapolated forward to 2036 and five year increments up to then. By maintaining the 2%, 600 dwellings should be social housing by 2036, which means an additional 90 social housing units should be delivered. This forms a base level target for social housing to ensure no further net loss in the future (Table 4). It does not reflect the broader demand reflected in the waiting list time of 5-10 years for social housing in the Eastern Suburbs. The protection of social housing however is largely out of Council’s jurisdiction as it is developed and managed by the state government.

Demand for affordable rental housing/key worker housing

Affordable rental housing is aimed to assist very low, low and moderate income earners who are unable to afford rent in the private market. Affordable rental housing is managed by a community housing provider on behalf of Council where the dwelling is rented out at a capped percentage (around 70-80%) of the market rent. Affordable housing is sometimes referred to as ‘key worker’ housing.

It is important to understand the demand for key worker housing as key workers are essential to the social and economic wellbeing of cities. The financial ability of key workers to live somewhere is often used as a measure of housing affordability because they are generally in lower-paid occupations and need to live close to their place of work because of irregular shifts (e.g. at night) or the need to respond to emergency situations. Typically, key workers are teachers, nurses,

<sup>19</sup>Australian Bureau of Statistics 2018, ‘2049.0- Census of Population and Housing: Estimating homelessness, 2016’, accessed 12 November 2019, < <https://www.abs.gov.au/ausstats/abs@.nsf/mf/2049.0>>.

ambulance, paramedic and emergency services and police officers.

**Key workers** are essential to the social and economic wellbeing of cities. They typically include teachers, nurses, ambulance, paramedic and emergency services and police officers. The definition of a key worker could differ between places.

In 2016, there were 1,600 key workers on very low, low to moderate incomes living in Waverley. Between 2006 and 2011, there was a 15.2% net loss of these key workers in the Eastern Suburbs, and now Waverley LGA has the fifth lowest key worker population in Sydney.<sup>20</sup> The loss of key workers is telling of the broader picture that Waverley has grown as an increasingly unaffordable area for very low and low income households. This entrenches and exacerbates disadvantages as it “can force long distance commutes and increasingly displace asset poor older and younger people from areas where they have historically lived; thereby excluding those who play a valuable role in the Waverley’s economic and social fabric”.<sup>21</sup>

There are also people who work within Waverley on very low, low to moderate incomes who, while not designated as a part of the ‘key worker’ nomenclature, nevertheless form an important part of the economic function of Waverley. The top three local industries are retail, accommodation and food services and health care and social assistance industries. These lower income earners live across Sydney and are more likely to travel from outside the LGA (more than 10km) and therefore experience commutes of 1 hour or more. In total, there are approximately 20,000 local workers on very low, low to moderate incomes in Waverley.

To determine the forecast demand for affordable rental housing, households who need this housing are those who have very low, low or moderate household incomes and spend more than 30 per cent of this income on rent (i.e. are experiencing rental stress).

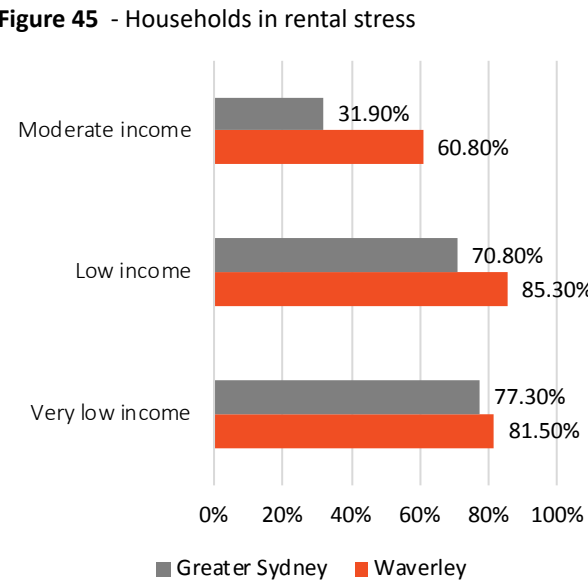
<sup>20</sup>Gurran, N., Gilbert, C. Zhang, Y., Phibbs, P. 2018, “Affordability in Sydney”, Report prepared for Teachers Mutual Bank, Police Bank and My Credit Union, The University of Sydney, Sydney.

<sup>21</sup>Judith Stubbs and Associates, 2016, SSROC Affordable Housing Submission: Background report part 1 – demographic and housing market analysis.

Housing stress is a critical measure of the need for affordable housing, as it shows the interplay between housing costs (rental and purchasing) and income levels. Housing stress has generally been defined as those households in the lowest 40% of incomes (i.e. very low, low or moderate income households) who are paying more than 30% of their usual gross weekly income on housing costs (rental or purchasing). Those experiencing mortgage stress are excluded from this demand analysis because they have the option of selling their asset and entering the private rental market.

Increasing housing stress caused by the loss of affordable housing has detrimental ramifications such as the displacement of long term residents in gentrifying areas, loss of cultural and social diversity, and key workers struggle to afford high housing costs proportionally to low incomes.

Rental stress is a growing issue across Sydney as more people choose or can only afford to rent in a competitive housing market. In 2016, 30% of households renting in Waverley are in rental stress, which makes up 13% of all households in Waverley. When broken down into the income brackets below,



Source: Housing.ID 2019, ABS Census 2016.



there is a stark comparison between the proportion of households in rental stress when compared to Greater Sydney. This is markedly noticeable for very low income and low income households where 81% and 85% of these households are in rental stress. Based on anecdotal evidence, these households are likely to be those on a pension or single income families. The proportion of households in rental stress has been translated as a base level demand target for the provision of affordable rental housing. In 2016, 13% of Waverley households were in rental stress equating to 3,440 dwellings (assuming one household=one dwelling). This made up 11% of the total dwelling stock in 2016. Table 5 indicates the likely future demand for affordable rental housing, assuming the proportion of rental stress remains constant. It highlights that just to address the current proportion of households in rental stress, an additional 600 affordable dwellings will be required by 2036; equating to approximately 30 affordable rental dwellings per annum.

7.2 Affordable housing supply

The NSW Environmental Planning and Assessment Act 1979 has explicitly aimed to promote and retain affordable housing. State and local governments in New South Wales have a relatively long history of addressing affordable housing through planning legislation and policy, much of which was developed during the 1990s. The focus has been on protecting existing sources of low-cost housing, especially in metropolitan areas; overcoming barriers to diverse housing forms contained in local planning schemes; and allowing planning authorities some limited opportunities to seek contributions towards affordable housing programs.<sup>22</sup>

Affordable Rental Housing State Environmental Planning Policy (ARHSEPP) 2009

The ARHSEPP was introduced to encourage the provision of new affordable housing developments and where low cost housing is lost, requiring a monetary contribution to offset the impact. The ARHSEPP applies to all LGAs in Greater Sydney and provides bonus floorspace provisions if new development provides a portion of new stock as

<sup>22</sup>Gurran N et al. New directions in planning for affordable housing: Australian and international evidence and implications, Australian Housing and Urban Research Institute (AHURI), June 2008

affordable housing for a fixed-term of 10 years. The ARHSEPP requires that where the demolition or strata subdivision of affordable rental housing is proposed, it must be offset by monetary contributions to be applied towards affordable housing.

Boarding houses

To encourage new affordable housing, the ARHSEPP provides a floor space bonus for boarding house development. In the period from 2009 to 2017, 73 boarding house rooms were approved, approx. 9 rooms per annum in the Waverley LGA. Research by City Futures demonstrates that boarding house developments generated under the bonus ARHSEPP provisions cater to a different market than traditional boarding houses. Of the 9,000 rooms provided by boarding house developments in the SSROC<sup>23</sup> region, around 50% were targeted student accommodation (typically clustered around university campuses). Of those boarding houses not specifically targeting student accommodation, the tenants are typically young, skilled and from a migrant background with a modest income. These boarding houses are low cost rentals but only marginally cheaper than one bedroom units. Therefore, new boarding houses are catering to a market for low cost housing, albeit not at the substantially discount rates of older style boarding houses. These new rooms will fill a gap in the market for low cost housing and it is expected that in the longer term will become relatively more affordable compared to existing stock.

Secondary dwellings

Secondary dwellings have long been part of Sydney’s urban form. Secondary dwellings include laneway development in the form of converted garages or new studios above garages and are a relatively common development type in Waverley. The introduction of the ARHSEPP in combination with standardised planning controls made secondary dwellings a form of complying development, making it easier to develop this type of housing. The introduction of the ARHSEPP had an immediate impact on the number of approvals for secondary dwellings as they more than doubled between 2008 and 2013.

Due to the existing established form of the Waverley area, the built-up nature of existing sites and smaller lot sizes, it is difficult to get a secondary dwelling

approved via complying development. This is because complying development has strict design requirements that must all be met. Therefore, the approval pathway is generally through development application to Council where assessment is more merit based and specific to the subject site. Between 2006 and 2016, 80 secondary dwellings have been approved in the Waverley LGA. This represents 6.5% of the total number of new dwellings in the same period.<sup>24</sup> Despite their popularity, these dwellings are said to create undesirable amenity issues, such as overlooking, with neighbours often objecting to development applications.

Issues with the ARHSEPP

The key intention of the ARHSEPP is to facilitate more affordable rental housing by encouraging smaller and by nature, less expensive, dwellings into the local housing market. However, the SEPP purely relies on the smaller nature of the housing to make it affordable, with no formal requirements to cap rent at an affordable rate. In the 2016/17 financial year 20% of secondary dwellings were rented out on the private market and were more expensive than comparable product in the market. Anecdotal evidence indicates that the remaining 80% of secondary dwellings are being utilised under private, likely informal arrangements for extended family or adult children to live in. This reflects a wider shift towards multi-generational households for social and cultural reasons but also increasing housing affordability pressures particularly for young adults trying to get their foot in the market. Moreover, it is out of Council’s control to monitor the rents to ensure that they are addressing the demand for affordable housing.

There are several operating flaws with the ARHSEPP which prohibit it from achieving its main objectives. Developers can bypass the requirement to offset the loss of affordable housing with monetary contributions by not providing historical data on the low rental status of the building as at 28th January 2000. Even when contributions are collected, they are not reinvested back into the Waverley LGA. Furthermore, developments only need to be available

<sup>23</sup>Southern Sydney Region of Councils (SSROC) includes Canterbury-Bankstown, Burwood, Inner West, Sutherland Shire, Georges River, Bayside, Randwick, Woollahra, and Waverley Councils.

<sup>24</sup>Troy, L., van den Nouwelant, R. and Randolph, B (2018) State Environmental Planning Policy (Affordable Rental Housing) 2009 and affordable housing in Central and Southern Sydney. City Futures Research Centre, Faculty of Built Environment, UNSW Sydney Australia.

at a discounted affordable rate for 10 years, not in perpetuity.

State Environmental Planning Policy 70 - Affordable Housing (Revised Schemes) (SEPP 70)

Ahe DPIE announced in early 2019 that all Councils will be included in SEPP 70. The premise of the SEPP is that it allows Councils to levy new development in areas where significant upzoning has occurred for affordable housing contributions. This is subject to an affordable housing needs analysis and viable contributions scheme. These contributions are then hypothecated to increasing the provision of affordable rental dwellings.

Waverley raised concerns in its submission to the draft SEPP 70 Guidelines that affordable housing contribution scheme should apply to all new development and that it is possible the guidelines misrepresent the Act<sup>25</sup> by only focusing on the ‘rezoning’ and not the ‘initial zoning’.

Waverley’s Affordable Housing Program

Waverley Council has had a longstanding commitment to the provision of affordable housing. The majority of Council’s portfolio was acquired through an affordable housing policy. Developers at the time made a request for additional floorspace under a SEPP 1 variation at the development application stage. In most cases the additional floorspace was delivered by a dedication of a dwelling in perpetuity to Council for the purposes of affordable housing. Units were generated through this process between 1996 & 2010. In order to provide greater flexibility the policy was amended to permit either the dedication and transfer of completed dwellings to Council as affordable housing in perpetuity, providing dwellings for a set lease term, or through monetary contribution. Through this process Council secured 44 units of affordable housing, 22 in perpetuity and 22 on leases of varying periods. All but one of the lease periods has now ended. The distribution of properties and their target demographic is summarised below.



Table 6 - Waverley Council Affordable Housing Portfolio

Program	Dwellings	Targets
Affordable Housing Program	25 units	Ordinary working people on <b>low to moderate incomes</b> who can demonstrate a connection to Waverley
Waverley Housing for Older People	47 units	People 55+ on <b>very low incomes</b> who can demonstrate a strong connection to Waverley
Waverley Housing for People with a Disability	3 units	Clients of Waverley Council’s Community Living Program for people with an intellectual disability with <b>very low to low incomes</b>

The Policy could not be applied after the gazettal of Waverley LEP 2010 which required all FSR and HOB controls to be included in the LEP rather than the DCP. Variations to FSR were then required under Clause 4.6 which meant that the Waverley AH Program could no longer be applied. Consequently, a Voluntary Planning Agreement (VPA) Policy was prepared which proposed that any DAs exceeding the FSR be encouraged to enter into a VPA which shared the value of any additional floorspace 50/50 with Council and that this monetary dedication be used by Council for a public purpose. Generally, this would involve capital works improvements in the vicinity of the DA however 10% of the VPA monetary contribution continues to be allocated to Council’s Affordable Housing Trust Fund which is used to develop or purchase additional affordable housing units. In 2016, Council invested a portion of its cash contributions in the joint purchase with Bridge Housing of a 4x2 bed unit block, for the purpose of provision of affordable housing.

7.2.3 Loss of affordable housing

An indicator of the loss of affordable housing is tracking boarding houses through Councils boarding house register. Councils records go back as far as 1996 and is updated every year. Since 1996, there has been a net loss of over 100 boarding house rooms in Waverley. This represents a decrease in the proportion of boarding house rooms from 2% to 1% of the total dwelling stock in a twenty year period.

The trends relating to boarding houses is at best a proxy for the broader picture relating to the loss of low cost housing. For example, using the data from

the boarding house register, in the period between 2010 and 2018 there was a net loss of 32 boarding rooms which equates to on average, the loss of 4 boarding rooms per annum. The Strategic Planning team completes referrals for the application of the ARHSEPP to new development applications. This allows Council to track where there is a loss of affordable housing. In addition to the demolition of a boarding house, the conversion of a company title block to strata title also results in a loss of affordable housing. In the 2017 / 2018 there were five applications that resulted in a loss of a total of 58 low cost, affordable rental dwellings. 58 low cost affordable rental dwellings are significantly higher than the average loss of 4 boarding house rooms per annum in the same year. Notwithstanding, there has been an overall loss of affordable housing and supply is not keeping up. The only provision of ‘pure’ affordable housing has been through Council’s Waverley Affordable Housing Program where there has been 75 units delivered since 1996. During the same period there has been a loss of over 100 boarding house rooms, which is only an indicator of the broader loss across the LGA. The delivery of boarding houses and secondary dwellings in recent years do provide some form of low cost housing primarily because of their smaller nature which makes them a more affordable product on the housing market. Furthermore, where dwellings are affordable, it’s only required to be for ten years.

7.3.4 Future affordable housing supply

As highlighted above, 80 secondary dwellings were approved between 2006 and 2016, which is

approximately 10 secondary dwellings per year. That means approximately 200 secondary dwellings could be delivered in the next 20 years (10 x 20 years). Since the introduction of the ARHSEPP, 73 boarding house rooms have been approved in the Waverley LGA; approximately 9 rooms per year. Extrapolating this forward means approximately 180 (9 x 20 years) boarding house rooms could be delivered in the next 20 years.

Affordable dwelling forms have not been factored into the table above but are important to meeting the overall housing target to 2036. Affordable dwelling forms did not form part of the capacity assessment which looked at net additional dwellings through dual occupancies in R2 and apartments in R3, B4 and R4. These would be subject to different requirements which was not completed in this discussion paper. Notwithstanding, these should be monitored alongside dwelling completions into the future as they fill a gap in the spectrum of housing options. Consideration should also be given to how much one affordable dwelling form compares to a typical dwelling in terms of meeting demand.

7.2.5 Affordable housing supply gap

On a yearly basis, below is a summary of known supply of affordable rental housing in Waverley:

- Dedicated Council units – 75 dwellings
- Low cost housing (approved through the ARHSEPP) – 19 dwellings (for a maximum of 10 years)

Based on what is currently on the market the following number of affordable (i.e. 30% of income) rental units were available to each income bracket:

- Very low income – 7 dwellings

Known supply of affordable rental housing is 94 dwellings pa.

Market supply of affordable rental housing = 1, 789 dwellings pa.

Total supply of affordable rental housing = 1,883 dwellings pa.

- Low income – 239 dwellings
  - Moderate income – 1,543 dwellings
- As at 2016, 3,438 households needed affordable rental housing because they were either a very low, low or moderate income household spending 30% or more of their household income on rent. The current supply of affordable rental housing is only meeting 57% of demand. 43% of households in rental stress are not going to have their housing needs met in the current housing climate. This gap is also likely an underestimation of the actual gap between affordable rental housing supply and demand. It does not account for the fluctuations in available market supplied units, or that the affordability of units approved through the ARHSEPP is questionable given the latest research discussed above.

7.3 Affordable housing target

The District Plans indicate that Councils should aim to implement an affordable housing target of 5-10% of floor space for developments that experience uplift in the planning controls, subject to viability. The 5-10% would only apply to the additional floor space achieved through uplift. For example, if a development was rezoned to allow for 100sqm in addition to what was previously allowed on site, 10sqm of that would be dedicated to affordable housing, rather than across the whole development. This strategy does not recommend uplift in the planning controls due to the existing level of density and capacity to meet targets under the current controls.

A different approach to levying affordable housing contributions is proposed, including a lower contribution rate for all new residential floor space and a higher contribution rate on sites that experience uplift. Initial modelling and feasibility suggest that the following scheme could comprise the following elements:

- 1% phasing up to 3% over time on all new residential apartment development.
- 10-15% applying to sites that get uplift in the planning controls.

These targets alone will not close the affordable housing gap in Waverley but is a base level that could be achieved in collaboration with the State Government.



### 7.4 Summary

Affordable housing refers to a spectrum of housing options including social housing, affordable rental housing, and certain types of market housing. There are few opportunities in Waverley to access affordable housing. Unaffordability has been a growing issue over the last two decades as household income to house price ratio has increased from 4 in 1994 to 12 in 2016. At present, Waverley is severely unaffordable. Waverley's rent for all dwellings is 1.3 times higher than the Sydney average. As a result, 30% of all renting households are in rental stress and most strikingly 85% of low-income households are in rental stress.

The current forms of affordable housing supply are not going to meet the relevant demand. Waverley has the fifth lowest key worker population in Sydney. Where key workers are on a very low, low and moderate income, this is contributing to overall demand for affordable housing. To meet the base demand, 11% of total dwelling stock needs to be affordable. Projecting this to 2036, this equates to an additional 600 affordable rental dwellings, or approx. 30 affordable rental dwellings per annum. Proposed affordable housing targets of 1-3% on all new development and 10-15% on development receiving uplift, while not meeting all underlying demand, will provide a pathway to increasing affordable housing in the LGA. Furthermore, to retain the current proportion (2%) and ensure no further net loss of social housing, 90 social housing units should be delivered by 2036. Whilst Council can continue to advocate for this, the state government owns and manages social housing.

The current sources of affordable housing are from what is approved under the ARHSEPP, Waverley Council's Affordable Housing program and what's available in the market. The current supply of affordable rental housing is only meeting 57% of demand. 43% of households in rental stress are not going to have their housing needs met in the current housing climate.



## 8 FUTURE HOUSING

### 8.1 Consultation

Council continually engages with various stakeholders on housing issues. In 2017, Council undertook extensive community consultation as part of the preparation of the Waverley Community Strategic Plan 2018-2029. It was identified that there is a desire to develop a holistic vision with respect to sustainable growth and development, avoid further high rise development and overdevelopment in general, protect our heritage buildings, particularly Waverley Cemetery and the Boot Factory, provide more social and affordable housing and address concerns about the impact of Airbnb activities many seeking regulation and management.

In early 2019, the Local Housing Discussion Paper was prepared. This included a detailed evidence base that included a local trends analysis, a demand forecast, supply assessment and recommendations for further investigation in this strategy. This document was placed on exhibition with the draft Local Strategic Planning Statement.

The draft version of this Strategy was also placed on public exhibition. The following issues arose from various stakeholders.

#### Residents

The community has raised in multiple forums concerns regarding overdevelopment, particularly the impacts on traffic. Infrastructure provision with housing growth is coordinated with state government agencies, which Council will continue to do. Affordable housing was also a key concern for housing. Anecdotal evidence highlighted the detrimental effect of sky-rocketing housing costs on people's mental health and well-being. In addition, the loss of diversity in an area with key workers not being able to afford to live in or move to Waverley. There is widespread support for an affordable housing target and incentives for its provision.

#### Development Industry

The development industry supports a range of housing opportunities to support and retain a diverse community. It was indicated that housing targets should be articulated with opportunities for increased density suggested throughout the LGA. There was support for affordable housing, where an incentive-based approach is used to deliver this.

#### Community Housing Providers

Community housing providers voiced strong support to maximising available planning mechanisms to increase the amount of affordable rental housing in Waverley. The submissions reiterated the economic and social benefits of affordable rental housing and the role it plays in supporting job growth and economic prosperity for local communities.

#### NSW Government

NSW Government agencies provide input into planning processes affecting infrastructure such as public transport, major roads, social housing, schools, hospitals, major utility infrastructure and regional cycling routes. Council aims to work with NSW government agencies to ensure future housing is supported by the appropriate infrastructure.

### 8.2 Housing priorities

The vision for housing has been developed in line with the local policy framework. The overall CSP and LSPS visions talk to protecting and celebrating Waverley's natural assets, vibrant communities and embracing rich cultural heritage.

The following sections include a discussion of each priority and the relevant housing issues. Each section has a summary table of the actions relevant to that priority.





## Priority H1 Manage housing growth sustainably and in the right location

Councils have a responsibility to ensure future housing growth is managed sustainably and in the right location. The NSW State Government requires that Councils develop a housing target. In response, Council has developed a housing target of 3,400 dwellings to 2036. Initial capacity modelling of the current planning controls indicates there is capacity to accommodate this housing target.

The housing target is based on historical supply trends and essentially reflects the same level of growth into the future, except for the latest housing supply of new residential flat buildings in Bondi Junction. The apartment boom in Bondi Junction has not been factored into future housing supply trends because it is not likely that there will be a significant redevelopment opportunity in the foreseeable future. No changes to the current planning controls are proposed to achieve the housing target, as latent housing capacity is expected to accommodate the projected population growth.

Waverley has recently experienced significant levels of housing growth, driven by redevelopment of the Bondi Junction strategic centre. There are limited opportunities for comparable redevelopment throughout the rest of the LGA. Future housing should be located close to transport and access, social infrastructure and essential services, community and cultural services and open space and recreation. Generally, all parts of Waverley have good access to these amenities, making it suitable for housing in the context of Greater Sydney.

There may be anomalies in the planning controls where the existing planning controls do not align with the existing built form or desired future character. This would need to be addressed in the preparation of the comprehensive review of the LEP or in future reviews of the LEP.

There may be circumstances where changing the planning controls can facilitate the realisation of housing capacity and achieve better planning outcomes. In other cases, changes to the planning controls could enable a built form that responds better to surrounding context and creates a better urban environment. Adjusting height and built form planning controls may also enable a development to proceed, which will help realise capacity. In these instances, site-specific or precinct planning proposals that allow for more housing should demonstrate delivery of public benefits, such as publicly accessible open space or affordable housing.

The Principles for Change document outlined in the LSPS includes principles that should be considered in the assessment of Planning Proposals. The purpose of the Principles is to ensure the proposals are considered holistically with all the priorities, objectives and actions of the District Plan, as well as Waverley's strategic priorities, are appropriately balanced in the decision-making process.

Table 7 - Priority H1 Actions

In giving effect to the Greater Sydney Commission Eastern City District Plan, this housing priority delivers on the following planning priorities:

**E5:** Providing housing supply, choice and affordability with access to jobs, services and public transport

**E6:** Creating and renewing great places and local centres, and respecting the District's heritage

**E10:** Delivering integrated land use and transport planning and a 30 minute city

Action		Mechanism	Timeframe
H1.1	Continue to facilitate housing development utilising capacity available under current controls.	Policy and legislation	Ongoing
H1.2	Work with Transport for NSW to review the capacity of the traffic network in Waverley to understand the impact of any future dwelling growth.	Collaboration	Short-term
H1. 3	Work with Sydney Water to further understand the capacity of the existing water and wastewater network and the extent of upgrades that would be required to these systems to accommodate future growth.	Collaboration	Short-term
H1. 4	Any Planning Proposals to increase residential development capacity should be consistent with the Principles for Change as outlined in the LSPS, such as "Proposals should create demonstrable public benefit" and "Proposals should be consistent with the relevant liveability, productivity, infrastructure and sustainability priorities, objectives and actions in this Local Strategic Planning Statement."	Policy and legislation	Ongoing
H1. 5	Monitor the ongoing housing supply and take up of capacity against our housing targets. Where capacity is not delivering, consider opportunities for sensitive uplift.	Policy and legislation	Medium-term





## Priority H2

### Encourage a range of housing options to support and retain a diverse community

A current and future challenge for housing in Waverley will be to support social and cultural diversity through increasing housing diversity and choice. As more people are living in higher density developments, greater focus is needed to facilitate greater diversity and choice of housing that is fit-for-purpose and addresses the social and cultural needs of specific groups. The added layer to providing a diverse range of housing is that it also needs to be affordable. This is addressed further in Priority H3.

#### Seniors housing

The population in Waverley aged over 65 years is projected to increase by 38% by 2036 to a total of approximately 8,800 residents. This represents 11% of the projected population.

State level policies that facilitate the provision of seniors housing override local planning instruments, which leads to challenges ensuring new development is consistent with local character. Recent seniors housing development points to an opportunity to include zone objectives specifically relating to the provision of seniors housing. Namely ensuring that local character is maintained on sites where seniors housing would be permissible under the seniors housing SEPP.

Waverley has a targeted affordable housing program for older people, and the demand for this is growing. For non-home-owning retirees, Sydney's rental market provides very little affordability and even less security, with less the Anglicare Rental Affordability Snapshot (2018) noting that less than 1% of Sydney's listed rental properties on the market, including studio apartments, are affordable to either a couple or individual receiving the full aged pension.<sup>25</sup> Where seniors housing is provided, Council should advocate for affordable options.

#### Bedroom mix

There are currently no controls relating to bedroom mix in the LEP or DCP. If this continues to be left to the market, then there is potential that there will be insufficient housing suited to families or older people wanting to downsize who may be priced out of the area.

#### Low Rise Medium Density Housing Code

The Low Rise Medium Density Housing Code allows one and two storey dual occupancies, manor houses and terraces to be carried out under a fast track complying development approval so long as it complies with all the relevant requirements in the State Environmental Planning Policy (Exempt and Complying Development Codes) 2008. The issue with the code is that it can allow development that may not align with Council's planning controls for similar development.

#### Short term rental accommodation

A policy framework was announced in October 2018 which proposed a maximum 180 days per year usage of a dwelling for the purposes of STRA if the host is not present on site (i.e. entire home listings). The policy stated that STRA would be classified as 'exempt development' (i.e. not requiring planning permission) under the Exempt and Complying Development Codes SEPP for homes where a host is present (i.e. renting out a 'spare room') and for 'entire homes' where a host is not present; to a maximum of 180 days per year for entire homes. In April 2019, Council resolved that a submission be prepared to the Minister for Planning and Environment for Waverley Council's inclusion in the Ministerial Direction '3.7 Reduction in non-hosted short-term rental accommodation period' to reduce the period that 'entire homes' can be leased as short-term rental accommodation from 180 days to 90 days per year. A submission was sent on 24th June 2019 and was subsequently refused by the state government on 25th September 2019.

DPIE are currently undertaking a review of the policy framework for STRA. This will likely take effect in 2020.

<sup>25</sup>Committee for Sydney 2019, 'Dignity and choice: An inclusive future for our aging population', p.11.

Table 8 - Priority H2 Actions

In giving effect to the Greater Sydney Commission Eastern City District Plan, this housing priority delivers on the following planning priorities:

**E3:** Providing Services and social infrastructure to meet peoples changing needs

**E4:** Fostering healthy, creative, culturally rich and socially connected communities

Action	Mechanism	Timeframe
H2.1	Review bedroom mix for new development in planning controls with a view to promoting three bedroom apartments.	Policy and legislation Short-term
H2.2	Undertake a more detailed review to confirm capacity for future seniors housing and, where seniors housing is currently permissible on non-residential land under the Seniors Housing SEPP, implement planning controls, and opportunity sites where it would be most suitable.  Investigate including zone objectives in the LEP to encourage seniors housing and that it is consistent with desired future character.	Policy and legislation Short-term
H2.3	Monitor the implementation of the new Short term rental accommodation policy framework and continue advocating for improved controls where appropriate.	Policy and legislation Ongoing
H2.4	Undertake further analysis and monitor the applicability of the Low Rise Medium Density Housing Code to assess whether Council's controls be updated to reflect the code to encourage Development Assessment pathway. This analysis should include a review of the minimum lot size for subdivision under the LEP and the code.	Policy and legislation Short-term





### Priority H3 Increase the amount of affordable rental housing and social housing

Housing affordability really requires a national approach, with significant intervention required by the state and federal governments to have any meaningful impact on addressing the issue holistically. There are mechanisms to address housing affordability outside of the planning system such as tax treatment of housing and grants controlled by the state and federal governments. Notwithstanding, Council does have a role in providing, subsidising and facilitating housing for all aspects of the housing continuum. The provision of affordable housing will ensure that residents are not priced out of the area and very low to moderate income earners, such as students and key workers, can afford to live in Waverley.

Through collaboration and advocacy with neighbouring Councils, industry stakeholders and government agencies, Council will endeavour to make mechanisms scalable and effective beyond LGA boundaries.

#### Affordable housing contributions

The planning framework can be used to collect monetary contributions towards affordable housing. These contributions can be used to subsidise housing costs to increase housing affordability and also increase the amount of affordable housing.

There are two state environmental planning policies (SEPP) that currently do this- the Affordable Rental Housing SEPP (ARHSEPP 2009) and SEPP 70.

Council has advocated and will continue to advocate to DPIE to address the operating flaws of the ARHSEPP. These flaws include the lack of ability to levy for the loss of affordable housing, investing contributions back into Waverley and that built outcomes, particularly boarding houses, are affordable.

It was announced in 2019 that all Councils will be included in SEPP 70 which allows Councils to collect monetary contributions for affordable housing

in areas where there is significant uplift through planning controls. Whilst this Strategy does not make recommendations for areas of uplift, Council will aim to utilise this mechanism to apply an LGA wide affordable housing contribution rate.

Alternatively, Council will investigate an LGA wide affordable housing contribution rate. City of Sydney Council has just had a Planning Proposal approved for an LGA wide contribution rate starting at 1% and phasing it up to 3%. Waverley will also investigate the feasibility of introducing a similar contributions scheme to apply across the whole LGA. Initial modelling and feasibility suggest that the following scheme could comprise the following elements:

- 1% phasing up to 3% over time on all new residential apartment development.
- A higher levy of 10-15% applying to sites that get uplift in the planning controls.

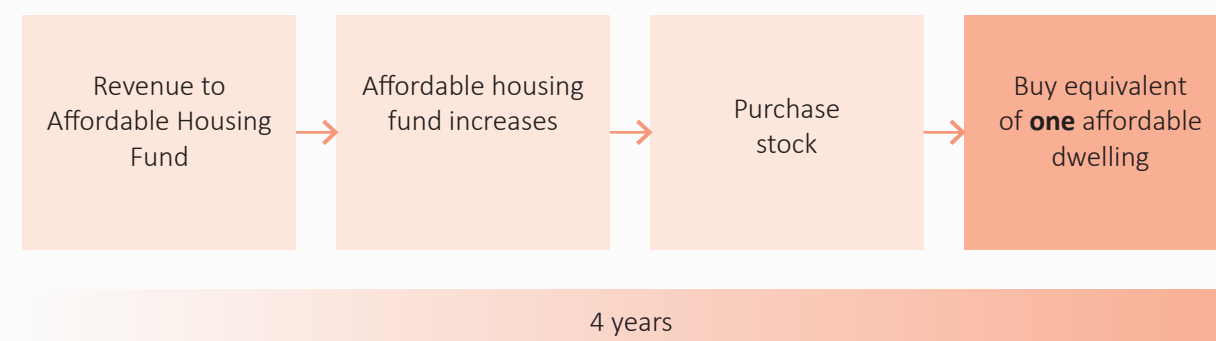
These targets alone will not close the affordable housing gap in Waverley but is a base level that could be achieved in collaboration with the State Government.

#### Voluntary planning agreements

The mechanism to collect affordable housing contributions may be through a voluntary planning agreement (VPA). The current Waverley Planning Agreement Policy 2014 requires that for every VPA contribution, 90% of funds go towards capital works in the immediate vicinity of the development e.g. upgrade of parks, installation of play equipment, installation of lighting to parks, upgrade of the coastal walk and 10% goes towards Waverley's Affordable Housing Program. Since the introduction of the Waverley Planning Agreement Policy 2014, \$2.4 million has been negotiated towards Waverley's Affordable Housing fund.

Voluntary planning agreements are currently the only revenue stream for affordable housing in Waverley. It

Figure 46 - Current funding model for affordable housing



#### Supporting assumptions:

Revenue from commercial floorspace = \$200,000

Average price of 1 bedroom dwelling in Bondi Junction = \$800,000

Number of years to save for 1 bedroom dwelling via current approach

is also the only planning mechanism that Council can fully control the collection of monetary contributions and where it gets invested. The evidence base in this strategy highlights that as housing and living prices continue to increase, continuing to live in the Waverley area cannot be justified for some of our long-term community members and workers on very low, low and moderate incomes. Housing in Waverley is extremely unaffordable where 30% of households that rent are in rental stress.

The funding split for VPA contributions will be reviewed as part of an update to the Planning Agreement Policy 2014. It is recommended that the update implement a framework that facilitates 100% of VPA contributions to be hypothecated to affordable housing, where appropriate. With no holistic scheme being led by State or Federal governments to address housing affordability, Councils must make the most of available mechanisms to take on this responsibility. Furthermore, capital works are required regardless of access to VPA funding so realistically they would find another funding source, often grant funding via the NSW Government. Therefore, the use of VPA funds for capital works may not be funding additional capital works but rather capital works that would have been funded via other sources or in later years in the Long Term Financial Plan.

#### Use of monetary contributions

Waverley Council has had a longstanding commitment to the provision of affordable housing. Between 1996 and 2010, Council secured 44 units for affordable housing and in 2016, Council invested a portion of its cash contributions in a joint purchase with Bridge Housing of a 4 x 2 bedroom unit block for affordable housing. Given the latest residential booms, this traditional model of purchasing older flat buildings is no longer viable or considered 'bang for buck'. Council cannot compete with developers who can pay a premium to renew these sites. Should Council continue the same approach to purchase apartments the current fund of approximately \$2.4 million could purchase two to three units.

#### Innovative affordable housing funding model

Council has recently negotiated a VPA for an in-kind contribution of commercial floor space in Bondi Junction. The net revenue from the floorspace is to be hypothecated to a public purpose in perpetuity, which in this case will be affordable housing. With Council's current model, the net revenue would be hypothecated to the affordable housing fund and will accrue until there is enough capital to purchase housing stock. Using this approach, it could take up to four years to purchase one dwelling for affordable housing, as outlined in the diagram below.



Community Housing Provider (CHP) opportunities

Registered Community Housing Providers are a growing part of the social housing system, with the capacity to leverage their portfolio and attain access to funding streams to fund new affordable rental housing. Council has worked with a Community Housing Provider in the past to partner in the acquisition and ongoing maintenance of affordable housing.

Social, crisis and transitional housing

Waverley has a low proportion of social housing compared to other LGAs across Sydney. The amount of social housing should be increased across the LGA as it is aimed towards helping those most in need. Both Council and the State Government own social housing in Waverley. Council’s social housing program is allocated to older people on a very low income.

Crisis and transitional housing is also available throughout Waverley for people seeking refuge from violent relationships, homelessness or any other circumstances that place them in a situation where they are without a home.

Alternative housing models

Waverley should encourage and facilitate new ideas for housing such as creative tenancy arrangements like shared co-operative living and new funding or delivery models.

Build-to-rent residential is an emerging asset class in Australia. Note, this is not a land use term and there are no restrictions limitis this in the LGA. The development type generally reflects a typical residential flat building but is designed and built specifically to be rented out over the long-term by institutional or private owners. This could add to rental stock in the area for those who cannot afford to purchase in the market.

Co-operative living/co-housing is a people-centred approach where housing is designed and developed for specific needs. It ensures choice and control in the housing market. There are many benefits from co-operative living such as catering for diverse household types at different stages of life, security of tenure, reduced living costs and self-management. It also provides the opportunity for innovative design focusing on vibrant communities, environmental sustainability and the productive use of shared spaces.

Figure 47 - Proposed funding model for affordable housing

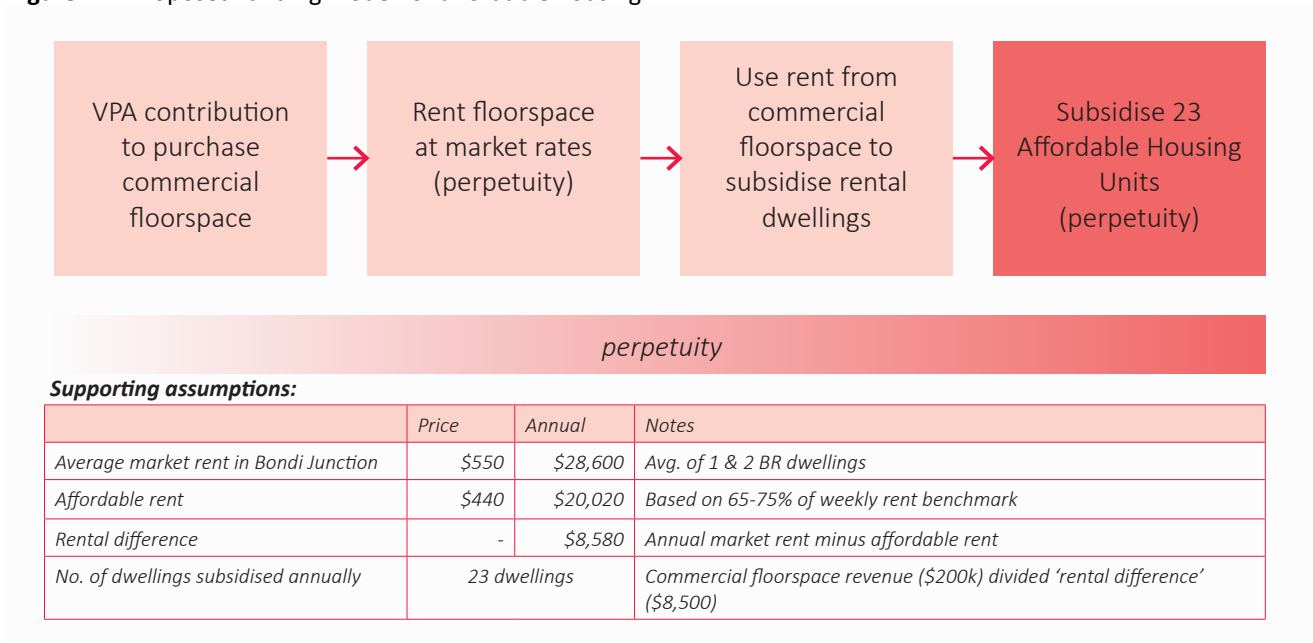


Table 9 - Priority H3 Actions

In giving effect to the Greater Sydney Commission Eastern City District Plan, this Local priority delivers on the following planning priorities:			
E3: Providing Services and social infrastructure to meet peoples changing needs			
E4: Fostering healthy, creative, culturally rich and socially connected communities			
Action		Mechanism	Timeframe
H3.1	Develop an affordable housing contributions scheme for all new apartment developments. Initial modelling and analysis suggests the scheme could comprise the following elements:  * A small levy (1-3%) applying to all new residential apartment development  * A higher levy (10-15%) applying to sites receiving uplift through planning controls.  * Contributions to offset the loss of affordable housing.	Policy and legislation	Short-term
H3.2	Review the VPA Policy to consider an increase up to 100% of VPA contributions towards affordable housing and to develop criteria to determine where this is appropriate.	Policy and legislation	Short-term
H3.3	In collaboration with the Housing Programs and Community Support team, investigate and implement new housing delivery models to maximise the provision of affordable housing.	Policy and legislation	Short-term
H3.4	Work with Randwick and Woollahra Council on a regional approach to addressing affordable housing.	Collaboration	Ongoing
H3.5	Advocate to the NSW Government for a more holistic approach to addressing affordable housing.	Advocacy	Ongoing
H3.6	Council should continue to investigate opportunities for the provision of affordable housing in partnership with community housing providers (CHPs).	Collaboration	Short-term
H3.7	Advocate for improvements to the Affordable Rental Housing SEPP 2009- specifically the date to determine where contributions are applicable, investing contributions back into Waverley and that built outcomes, particularly boarding houses, are affordable.	Advocacy	Ongoing
H3.8	Update relevant zone objectives to encourage the provision of affordable housing.	Policy and legislation	Short-term
H3.9	Continue supporting the increased provision of social, crisis and transitional housing. Look to working with the Land and Housing Corporation (LAHC) to increase the provision of this kind of housing.	Collaboration	Ongoing





## Priority H4

### Improve liveability, sustainability and accessibility through high quality residential design

Future housing should go above and beyond the minimum design and sustainability standards to ensure they are resilient and can be adapted for a range of needs. High quality housing is also liveable.

#### Sustainable housing

The buildings that are built today will need to last for future generations. They do this by maximising quality and affordability and fostering optimal use of materials, water and energy resources, while ensuring adaptability and resilience to demographic and environmental changes. The existing building stock will need to perform under the pressures of climate change, which means having increased thermal comfort and adaptability to the external temperature, minimising the power load, being prepared to reduce costs and damage from extreme storm events, and managing water more sustainably.

Sustainable housing should use materials that reflect heat, and by providing adequate tree canopy and vegetation for shade, as well as deep soil planting rather than paved areas. A way to manage the urban heat island effect is to integrate green roofs and facades, as well as plant and maintain canopy trees, and reduce paved areas. This provides more shade, and less reflective surfaces to reduce the urban heat island effect, but also increases habitat for plants and animals, as well as increasing permeable area on site to reduce stormwater runoff. An important environmental design element that is often forgotten is permeable landscaping (that is, areas that are not paved or concreted) which can be either planting or turf, which allows water to replenish the soil and water table beneath. This is important because it increases the health of the soil, reduces stormwater runoff into the ocean, and reduces the heat island effect by lowering the localised microclimate temperature.

#### Passive design

Passive design is architectural design that responds to the specific microclimate of a site to minimise the need for active power consumption and production.

Passive design is very specific to each site and is therefore difficult to mandate or design a standard approach for. However, this approach would lead to not only minimising the load on the power grid, but also improving the general performance, comfort and lifespan of buildings. Typical Passive design approaches include clever selection of materials, the use of thermal mass and planting to create heat or cool through the day.

#### Accessible and Adaptable Housing

Accessible and adaptable housing enables people with disability and older people to live with independence and dignity, and age in place. Housing that is universally designed is more versatile and can better meet the changing needs of occupants, including families, over their lifetimes.

It is recommended that Council continue to apply its existing approach to requiring 20% of dwellings in developments with 10 or more dwellings to be adaptable units in accordance with the Australian Standard AS 4299-1995 Adaptable Housing and that all new dwellings (excluding detached housing and other low density residential) comply with the Livable Housing Design Guidelines Silver Level.

#### Design excellence

Planning controls are key to encouraging design excellence in new development. Waverley has a Design Excellence Advisory Panel that reviews development applications and pre-development applications and provides advice to Council staff and the determining authority (Waverley Local Planning Panel or Sydney Planning Panel) for a wide variety of development. Waverley regularly reviews and improves its own planning controls to ensure that new development is well-designed, provide a high level of amenity and sustainability for its residents and is a sensitive response the surrounding streetscape.

Table 10 - Priority H4 Actions

In giving effect to the Greater Sydney Commission Eastern City District Plan, this Local priority delivers on the following planning priorities:

**E6:** Creating and renewing great places and local centres and respecting the District’s heritage.

**E19:** Reducing carbon emissions and managing energy, water and waste efficiently.

**E20:** Adapting to the impacts of urban and natural hazards and climate change.

Action	Mechanism	Timeframe
H4.1	Continue to work with other agencies and advocate for increases to the BASIX Energy, Water and Thermal Comfort standards and develop BASIX standards for waste for new dwellings and alterations and additions, to not only improve the sustainability performance of buildings today, but also to improve the ongoing resilience of buildings to climate change into the future.	Advocacy Short-term
H4.2	Investigate developing a design guide for controls relating to passive design, requiring buildings to be designed to respond to the environment and microclimate of a specific site. Investigate success of approaches in Victoria where Councils have a dedicated Ecologically Sustainable Design (ESD) Officer to assist certain projects to improve the passive design and other ESD approaches on a site by site basis.	Policy and legislation Short-term
H4.3	Work with other agencies to develop guidelines for housing design and advocate for a mandatory whole-of-house energy & water rating scheme with minimum performance standards, to ensure that the existing housing stock is retrofitted and that new developments meet the minimum performance standards to ensure comfortable, affordable, sustainable housing for all Waverley residents.	Local Government Guidelines and Advocacy for change at State Government Level Medium term
H4.4	Investigate developing a policy implementation plan and design guide for Green Roofs and Walls, which would outline a plan for how to increase urban vegetation to reduce heat in the Waverley LGA, as well as design guidelines for building green walls or roofs, deep soil planting and permeable landscaping.	Further research Short-term





Priority H5

Ensure new development is consistent with the desired future character

The Waverley LGA has a rich diversity of architectural styles and dwelling types from detached dwellings by the beach, medium density townhouses and manor homes, to high-rise living in the Bondi Junction Strategic Centre. It is crucial that the local character and housing diversity in these areas is preserved as future housing growth will consist almost entirely of apartments in medium to high density development.

Local character

Local character is what makes one area distinctive from another. It is the way an area ‘looks and feels’. Character is created through the interrelation of distinctive natural and built elements in the public and private domains, including topography, vegetation, streetscape, built form, activity types, as well as the emotional and cultural experience of a place.

Where the character of an area is highly valued, there are opportunities to maintain or enhance that character for the enjoyment of existing and future residents, workers and visitors. Respecting local character does not mean that change cannot occur, rather it means that good planning and design needs to be implemented to ensure new development builds on the valued characteristics of an area. Places which develop in response to an identified local character and agreed desired future character are likely to be more liveable, more sustainable and more productive. In response to the NSW Government’s direction to elevate the consideration of local character in planning and decision making, Council is investigating how to integrate local character within the local planning system, first as part of the strategic planning process and then through its translation into statutory controls.

Heritage Review

Heritage forms an important part of local character. Waverley is required to maintain a list of heritage items and conservation areas that are significant to the local area under the Local Environmental Plan 2012 (Schedule 5). Protection of heritage is consistently raised as an important issue by our community. Council officers have recently prepared a heritage assessment to identify, analyse and assess the environmental heritage of the Waverley local government area, make practical recommendations for its conservation, recommend existing and ongoing heritage promotions and educate and inform Waverley’s residents about heritage protection.

Sensitive alterations and additions

Given the diminishing availability of lower value sites there is increased pressure to replace high value residential uses with even ‘higher’ value residential uses and densities. This trend is occurring in Waverley where houses are replaced by apartments and existing apartment complexes are further developed with additional apartments through alterations and additions. There are also different approaches to the design of these additions. Council has supported cohesive alterations that maintain the core form and articulation of the original building.

Table 11 - Priority H5 Actions

In giving effect to the Greater Sydney Commission Eastern City District Plan, this Local priority delivers on the following planning priority:

E6: Creating and renewing great places and local centres, and respecting the District’s heritage

Action		Mechanism	Timeframe
H5.1	Complete Local Character Statement Discussion Paper to identify important areas of local character that warrant more tailored planning controls, including where exemptions could be sought from the Code SEPP.	Policy and legislation	Short-term
H5.2	Complete Heritage Review to identify, analyse and assess the environmental heritage of the Waverley local government area and make practical recommendations for its conservation.	Policy and legislation	Short-term
H5.3	Investigate reviewing the LEP and DCP controls to allow sensitive changes to older apartment blocks that encourages design excellence and improves sustainability outcomes without compromising the desired future character and amenity of the surrounding area.	Policy and legislation	Short-term





# 9 IMPLEMENTATION

## 9.1 Mechanisms

Both planning and non-planning mechanisms will be used to achieve the visions and actions in this strategy. This section outlines the three overarching mechanisms available to local government to effect change in the housing space.

### 9.1.1 Advocacy

Council has a key role in advocating for the public interest to the state and federal government on housing issues. Council actively works with other local councils to discuss current housing issues to collectively address issues that occur across Sydney.

Advocacy can be achieved through submissions to planning legislation and policy reviews, inquiries and establishing working relationships with key stakeholders to discuss important issues.

### 9.1.2 Planning legislation and policy

Council's planning controls, including the Local Environment Plan and Development Control Plan, and supporting policies directly impact the amount and type of housing that will be delivered in Waverley. Following the finalisation of this strategy and other strategic studies, e.g. Village Centres Strategy and heritage review, a comprehensive review of the LEP will be completed. This comprehensive review will inform a Planning Proposal that will need to be prepared to make any changes to the LEP.

This strategy makes recommendations for opportunities to review planning controls or undertake further research to inform planning controls.

### 9.1.3 Collaboration

Council will work with other levels of government, other councils, academic institutions, business, not-for-profit groups and the community in addressing housing issues.

Working collaboratively provides the opportunity to learn new concepts and strategies from working in a multi-disciplinary group. It encourages innovative thinking and can link research with practice settings to strengthen a range of evidence based solutions. It also provides a process for public participation and an opportunity for groups and individuals to express their views about planning issues.

## 9.2 Monitoring and review

Council will monitor the progress of the priorities, objectives and actions of this strategy on an ongoing basis. This is essential to track its progress, ensuring accountability and transparency and ongoing adjustment, as required.

Monitoring and reporting to inform a review will involve:

- Annual reviews of the monitoring indicators in the implementation and delivery plan
- Review of this strategy and its actions where it requires significant amendment, should it become out of date with Council's and/or the District Plan's strategic priorities
- Review of housing supply against targets in accordance with the timeline



8.3 Implementation and delivery plan

	Issue	Action	Mechanism	Time-frame
<b>H1 Manage housing growth sustainably and in the right locations</b>				
1.1	There is sufficient capacity under current controls to accommodate our housing target and meet housing needs up to 2036.	Continue to facilitate housing development utilising capacity available under current controls.	Policy and legislation	Ongoing
1.2	Traffic congestion is a significant concern for the community.	Work with Transport for NSW to review the capacity of the traffic network in Waverley to understand the impact of any future dwelling growth.	Collaboration	Short-term
1.3	Understanding water infrastructure capacity is key considering future housing growth.	Work with Sydney Water to further understand the capacity of the existing water and wastewater network and the extent of upgrades that would be required to these systems to accommodate future growth.	Collaboration	Short-term
1.4	Planning proposals are consistent with Council's strategic priorities.	Any Planning Proposals to increase residential development capacity should be consistent with the Principles for Change as outlined in the LSPS, such as "Proposals should create demonstrable public benefit" and "Proposals should be consistent with the relevant liveability, productivity, infrastructure and sustainability priorities, objectives and actions in this Local Strategic Planning Statement."	Policy and legislation	Ongoing
1.5	Notwithstanding existing ostensible housing capacity, not every lot will redevelop and should housing capacity not meet our housing target and accommodate sufficient supply, sensitive uplift in the planning controls may need to be undertaken. Furthermore, work should be undertaken to consider how population can be accommodated after 2036.	Monitor the ongoing housing supply and take up of capacity against our housing targets. Consider opportunities for sensitive uplift.	Policy and legislation	Medium-term
<b>Monitoring indicators</b> # net annual dwelling increase compared to housing target # of planning proposals for residential development that align with principles for change				

	Issue	Action	Mechanism	Time-frame
<b>H2 Encourage a range of housing options to support and retain a diverse community</b>				
2.1	There is significant underlying future demand from families and downsizers requiring apartments larger than one to two bedrooms. Some Councils have mandated a percentage of apartments to be three bedroom in their LEP.	Review bedroom mix for new development in planning controls with a view to promoting three bedroom apartments.	Policy and legislation	Short-term
2.2	Ensuring there is capacity for future seniors housing developments as the population ages and address insensitive development approved on non-residential land under the Seniors Housing SEPP.	"Undertake a more detailed review to confirm capacity for future seniors housing and, where seniors housing is currently permissible on non-residential land under the Seniors Housing SEPP, implement planning controls , and opportunity sites where it would be most suitable. Investigate including zone objectives in the LEP to encourage seniors housing and that it is consistent with desired future character. "	Policy and legislation	Short-term
2.3	Short term rental accommodation, such as Airbnbs has had a detrimental impact on the availability of long-term rental stock, flows on to rental affordability, as well as neighbourhood amenity. Council's submission seeking to reduce the No. of days unhosted Airbnbs can be let, from 180 to 90 days was refused by the Minister.	Monitor the implementation of the new Short term rental accommodation policy framework and continue advocating for improved controls where appropriate.	Policy and legislation	Ongoing
2.4	The Low Rise Medium Density Housing Code allows higher density forms than Councils LEPs, particularly with a provision allowing for smaller minimum lot sizes. Most Sydney Councils sought an exemption from the Code to review and update their controls. Waverley did not seek an exemption and we will monitor the impact to understand whether certain areas should be exempted from the Code SEPP.	Undertake further analysis and monitor the applicability of the Low Rise Medium Density Housing Code to assess whether Council's controls be updated to reflect the MDHC to encourage Development Assessment pathway. This analysis should include a review of the minimum lot size for subdivision under the LEP and the code.	Policy and legislation	Short-term
<b>Monitoring indicators</b> % mix of studio, one bedroom, two bedroom and three bedroom apartments. # and type of seniors housing delivered # of STRA dwellings in Waverley % of lots developable under the MDHC and number of dwellings completed under the Code				



	Issue	Action	Mechanism	Time-frame
H3	Increase amount of affordable rental housing and social housing			
3.1	Affordable rentals are being eroded due to gentrification and redevelopment and long-term residents and key workers are provided with fewer opportunities for staying in the area.	"Develop an affordable housing contributions scheme for all new apartment developments. Initial modelling and analysis suggests the scheme could comprise the following elements: * A small levy (1-3%) applying to all new residential apartment development * A higher levy (10-15%) applying to sites receiving uplift through planning controls. * Contributions to offset the loss of affordable housing. "	Policy and legislation	Short-term
3.2	Funding an affordable housing program is very difficult given limited funding sources.	Review the VPA Policy to consider an increase up to 100% of VPA contributions towards affordable housing and to develop criteria to determine where this is appropriate.	Policy and legislation	Short-term
3.3	The current approach to delivering affordable housing is not working. There is a need to explore and develop new ideas to increase the amount of affordable housing.	In collaboration with the Housing Programs and Community Support team, investigate and implement new housing delivery models to maximise the provision of affordable housing.	Policy and legislation	Short-term
3.4	Affordable housing delivery should take an approach that considers how housing submarkets operate and the limited development sites in Waverley LGA.	Work with Randwick and Woollahra Council on a regional approach to addressing affordable housing.	Collaboration	Ongoing
3.5	The NSW Government limits mechanisms to make a meaningful impact on affordable housing delivery.	Advocate to the NSW Government for a more holistic approach to addressing affordable housing.	Advocacy	Ongoing
3.6	The Affordable Rental Housing SEPP 2009 is not meeting its objectives to deliver affordable housing outcomes. Contributions to offset the loss of affordable housing cannot be applied given a loophole in the legislation and new boarding houses are not being leased at an affordable rate.	Advocate for improvements to the Affordable Rental Housing SEPP 2009 - specifically the date to determine where contributions are applicable, investing contributions back into Waverley and that built outcomes, particularly boarding houses, are affordable.	Advocacy	Ongoing

	Issue	Action	Mechanism	Time-frame
H3	Increase amount of affordable rental housing and social housing			
3.7	The current approach to delivering affordable housing is not working. There is a need to explore and develop new ideas to increase the amount of affordable housing.	Council should continue to investigate opportunities for the provision of social housing in partnership with community housing providers (CHPs) and neighbouring Councils.	Collaboration	Ongoing
3.8	LEP zone objectives do not include affordable housing.	Update relevant zone objectives to encourage the provision of affordable housing.	Policy and legislation	Short-term
3.9	There is an identified need for social, crisis and transitional housing.	Continue supporting the increased provision of social, crisis and transitional housing. Look to working with the Land and Housing Corporation (LAHC) to increase the provision of this kind of housing.	Collaboration	Ongoing
	<b>Monitoring indicators</b> # of affordable housing units % of affordable housing supply to total dwelling stock \$ amount of monetary contributions for affordable housing			

	Issue	Action	Mechanism	Time-frame
H4	Improve liveability, sustainability and accessibility through high quality residential design			
4.1	The current BASIX standards are well below what is required for Waverley Council to meet its community greenhouse gas reduction target of 70% by 2030 (based on 2003/04 benchmark) or the NSW Government to meet it’s target of Net Zero Emissions by 2050 .	Continue to work with other agencies and advocate for increases to the BASIX Energy, Water and Thermal Comfort standards and develop BASIX standards for waste for new dwellings and alterations and additions, to not only improve the sustainability performance of buildings today, but also to improve the ongoing resilience of buildings to climate change into the future.	Advocacy	Short-term
4.2	There is a need to design and build quality housing that is comfortable to live in and energy and cost- efficient to run and that keeps people cool during extremes in temperature..	Investigate developing a design guide for controls relating to passive design, requiring buildings to be designed to respond to the environment and microclimate of a specific site. Investigate success of approaches in Victoria` where Council’s have a dedicated Ecologically Sustainable Design (ESD) Officer to assist certain projects to improve the passive design and other ESD approaches on a site by site basis.	Policy and legislation	Short-term
4.3	There is a need to reduce carbon emissions and improve energy and water efficiencies in the existing housing stock.	Work with other agencies to develop guidelines for housing design and advocate for a mandatory whole-of-house energy & water rating scheme with minimum performance standards, to ensure that the existing housing stock is retrofitted and that new developments meet the minimum performance standards to ensure comfortable, affordable, sustainable housing for all Waverley residents.	Local Government Guidelines and Advocacy for change at State Government Level	Medium-term
4.4	There is a need to reduce the urban heat island effect.	Investigate how to increase the urban canopy to reduce heat, as well as ways to encourage more planting as part of every development from trees to green walls or roofs, deep soil planting and permeable landscaping.	Further research	Short-term
	<b>Monitoring indicators</b> completion of ‘passive design’ guidelines and ‘green roofs and walls’ guideline; include additional design parameters to include community gardens or compost systems or waste recovery such as textile or electronic wastes in shared spaces of large developments, increased energy and water performance of residential buildings increased urban vegetation across the LGA develop waste management and transport standards for all building types reduction in community greenhouse emissions and water consumption			

	Issue	Action	Mechanism	Time-frame
H5	Ensure new development is consistent with desired future character			
5.1	Certain areas of high value character can be unduly impacted by insensitive redevelopment. Council cannot control Code approved housing.	Complete Local Character Statement Discussion Paper to identify important areas of local character that warrant more tailored planning controls, including where exemptions could be sought from the Code SEPP.	Policy and legislation	Short-term
5.2	Waverley has lost and is at risk of losing buildings with heritage value, given ongoing development pressure.	Complete Heritage Review to identify, analyse and assess the environmental heritage of the Waverley local government area and make practical recommendations for its conservation.	Policy and legislation	Short-term
5.3	Inconsistent approach to the design of alterations and additions to older residential buildings. Some older apartment blocks require fire and safety upgrades and seek an additional level to pay for this. There are no guidelines for circumstances and approach for additions. There is also an opportunity to incentivise improved sustainability outcomes.	Investigate reviewing the LEP and DCP controls to allow sensitive changes to older apartment blocks that encourages design excellence and improves sustainability outcomes without compromising the desired future character and amenity of the surrounding area.	Policy and legislation	Short-term
	<b>Monitoring indicators</b> Completed Local Character Statement Discussion Paper Completed Heritage Review and gazettal of any recommendations for changes to the LEP Completed review into design guidelines for sensitive changes to older apartment blocks			



# 10 APPENDICES

## 10.1 Appendix A – Glossary

Abbreviation	Term
ARHSEPP	State Environmental Planning Policy (Affordable Rental Housing) 2009
CDC	Complying development certificate
CHP	Community housing provider
CSP	Community Strategic Plan
DCJ	Department of Communities and Justice formerly known as Department of Family and Community Services
DPIE	Department of Planning, Industry and Environment
GSC	Greater Sydney Commission
GSRP	Greater Sydney Region Plan
LGA	Local Government Area
LHDP	Local Housing Discussion Paper
LSPS	Waverley Local Strategic Planning Statement
SEPP	State Environmental Planning Policy
SEPP 70	State Environmental Planning Policy 70 – Affordable Housing (Revised Schemes)
SSROC	Southern Sydney Region of Councils
VPA	Voluntary planning agreement
WAMP	Waverley Architectural Mapping Project
WLEP	Waverley Local Environment Plan 2012

Term	Definition
Affordable rental housing	Housing that is owned by government or a registered community housing provider and rented to a mix of very low to moderate income households.
Housing stress	A household is categorised as being in housing stress where it spends 30% or more of household income on housing costs.
Low cost housing	Housing that is ‘naturally’ more affordable than other stock e.g. older boarding houses, granny flats
Social housing	To qualify for social housing, tenants must be on very low to low incomes, need to support to live independently and/or have been unable to find affordable housing in the private market. Social housing includes public, community and Aboriginal housing. Public housing is managed by Department of Communities and Justice (DCJ formerly known as Family and Community Services) while community housing is managed by non-government organisations.
Voluntary planning agreement	A planning agreement is a voluntary agreement or other arrangement between one or more planning authorities and a developer under which the developer agrees to make development contributions towards a public purpose.
Effective demand	The quantity of housing that owner occupiers, investors and renters are able and willing to buy or rent in the housing market.
Underlying demand	The need for housing based on the number of households in the population.

## 10.2 Appendix B – Application of the Seniors Housing SEPP to Waverley LEP 2012 land use table

Land Use Zone	Permissible*	Prohibited
R2	Yes Seniors housing, Dwelling houses	Any other development not specified in item 2 or 3 i.e. Registered clubs, Hospitals
R3	Yes Seniors housing, Any other development not specified in item 2 or 4 i.e. Dwelling houses, Residential flat buildings	Registered clubs
R4	Yes Residential flat buildings, Any other development not specified in item 2 or 4	Registered clubs
B1	Yes Seniors housing, Any other development not specified in item 2 or 4  [Registered club additional permitted use at 118 Ramsgate Avenue ‘North Bondi RSL’ and 113 Macpherson Street ‘Bronte RSL’]	Residential accommodation, Registered clubs, Hospitals
B3	Yes- <i>where the land is currently being used for the purposes of a Registered club and a SCC has been issued</i>  Registered clubs, Any other development not specified in item 2 or 4	Residential accommodation
B4	Yes- <i>where the land is currently being used for the purposes of a Registered club and a SCC has been issued</i>  Registered clubs, Any other development not specified in item 2 or 4	Residential accommodation
SP2	Yes- <i>where a site compatibility certificate (SCC) has been issued (other than on land which development for the purposes of hospitals is permitted). Note: does not apply to dual occupancy development</i>  Land zoned for special uses including Health Services Facility, Educational Establishment, Place of Public Worship, as development that is ordinarily incidental or ancillary to development for that purpose	-
RE1	Yes- where the land is currently being used for the purposes of a Registered club and a SCC has been issued  Registered clubs	Any development not specified in item 2 or 3
RE2	Yes- <i>where the land is currently being used for the purposes of a Registered club and a SCC has been issued</i>  Registered clubs	Any development not specified in item 2 or 3
E2	-	Seniors housing, Residential flat buildings, Any development not specified in item 2 or 3
* excludes land within a HCA per cl.4A until 1 July 2020 and ‘environmentally sensitive land’ per Schedule 1 of Seniors SEPP		

10.3 Appendix C – Capacity assessment

A capacity assessment has been completed to identify what lots still have capacity to accommodate additional dwellings on a lot by lot basis. Three scenarios were developed, two using data collected from the Waverley Architectural Mapping Project and one using the DP&E’s Housing Mapping Scenario Tool (HSMT).

Bondi Junction

Beyond the supply pipeline outlined in section 6.4.5, there are a few remaining sites left in Bondi Junction. Using the HSMT, these sites collectively have a theoretical capacity of 200 dwellings.

Areas outside Bondi Junction

Three scenarios, differentiated by their base assumptions, were developed for the LGA outside Bondi Junction. The LGA was split into three areas North, Bondi Basin and South.

Methodology – Council approach

The following housing capacity analysis is an estimate of the net additional dwellings that can be accommodated under the current planning controls. The sources of data to complete the analysis were the Waverley Architectural Mapping Project and Council’s land and property information database. It allowed for a fine grain analysis, including feasibility considerations.

1. Land Use Zones

Only lots where residential development is permitted has been included in this capacity analysis. Roads, footpaths, infrastructure zoned SP2 and commercial centres have been excluded.

2. Developable lots

The abovementioned zones permit residential but may not have capacity for additional dwellings due to site constraints, existing development on the site or legislative constraints. The following criteria were applied to exclude the lots that cannot be or are unlikely to be redeveloped.

Strata and company title

Lots under strata and company title were excluded as they were deemed too difficult and costly to negotiate with multiple owners to purchase the site. Also, these lots would require a higher development return to be an attractive option compared to development on other lots. Should development occur e.g. rooftop additions, on these sites it is unlikely it would significantly increase dwelling yield.

Heritage

All heritage items were excluded due to additional design provisions that must be met. Conservation areas were included as development is less restricted compared to a heritage items, so long as it is sensitive to the character of the conservation area.

Lot size

Lots had to be equal to or greater than the minimum lot size under the Medium Density Design Guide for a dual occupancy, which is 60% of the relevant LEP lot size to do torrens title subdivision.

Architectural style

Architectural style, particularly post war styles (1950s onwards), generally aligned with the year they were built. Anything that was built after 1990 would be ‘too new’ in the scheme of potential development sites to redevelop.

Number of storeys

Lots there were 3 or more storeys were excluded as it indicates that the site could already be heavily capitalised and unlikely to be redeveloped or if development was to occur it would not significantly increase dwelling yield.

Dwelling type

The Waverley Architectural Mapping Project collected data on dwelling typologies throughout the LGA. These typologies were defined according to the classification of medium density housing types in the DPIE’s Low Rise Medium Density Housing Design Guide.

3. Scenario testing

The abovementioned criteria was applied to the LGA and then split up into two scenarios accordingly:

Scenario One: excluded everything from two dwellings up to residential flat buildings.

Scenario Two: excluded everything from multi dwelling housing up to residential flat buildings.

4. Potential dwelling yield

Each scenario was then further categorised by zoning to work out the net dwelling yield.

Lots in R2

Where lots met the assumptions above, the net capacity was one dwelling. This assumes a duplex is built, which equals one additional dwelling after factoring the demolition of the existing dwelling.

Lots in R3, B1, B4

The maximum gross floor area (GFA) was calculated by multiplying the floor space ratio (FSR) control by the existing lot size. The development yield was then extracted by dividing the GFA by an average apartment size. The net capacity was then worked out by subtracting the existing dwelling.

Methodology – Housing Mapping Scenario Tool

The DP&E released the Housing Mapping Scenario Tool (HMST) to assist Councils with the preparation of their Local Housing Strategies. To identify developable lots, lots that were strata titled, heritage items were excluded from the capacity assessment.

Results

The results in the table below show that Waverley theoretically has the capacity to develop further under the current planning controls. The methodology developed by Council for scenarios one and two, identify the remaining ‘low hanging fruit,’ i.e. ideal developable sites that are not already heavily capitalised. These sites are older single detached homes less than two storeys under scenario one and older detached, semi-detached, terraces and dual occupancies less than two storeys under scenario two. Adding semi-detached, terraces and dual occupancies to scenario two identified additional capacity for 500 dwellings.

It is important to note that these figures are theoretical capacity estimates and not theoretical supply estimates, therefore it does not assume that Waverley will develop to maximum capacity.

Table 12 - Theoretical dwelling capacity results			
	Theoretical dwelling capacity estimate including alternative secondary dwellings		
Area	Scenario One	Scenario Two	HMST
Northern suburbs + Southern suburbs + Bondi Basin	2,001	2,565	3,774
Bondi Junction	200	200	200
Total Dwelling Capacity	2,201	2,765	3,974

Source: Waverley Architectural Mapping Project 2018, Waverley LEP 2012, NSW State Government Housing Mapping Scenario Tool.



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