

Item 3 - Attachment I - Social and Economic Impact Assessment

CONCORD WEST

Social and Economic Impact Assessment



Prepared for Dickson Rothschild

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This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

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EXECUTIVE SUMMARY

HillPDA was commissioned by Dickson Rothschild to undertake this Economic and Social Impact Assessment (hereafter referred to as 'the Study') of a Planning Proposal for the rezoning of land in Concord West (hence referred to as the Precinct). The Precinct is defined as the area bounded by Liberty Grove to the north the railway line to the east, Homebush Bay Drive to the west and the Westpac building to the south.

The Planning Proposal

The Planning Proposal would facilitate a mixed use development comprising medium to high density residential and local retail uses.

The masterplan provides for:

- 1,465 residential apartments across 17 buildings ranging from 6 to 16 stories.
- 2,797sqm of shop front commercial spaces fronting Victoria Avenue near the train station.
- 4% of affordable housing
- Significant Public Domain upgrades
- Approximately 3,000sqm of public open spaces in a series of pocket parks and town squares
- Improvement of overland flow and flooding impacts
- Sustainable water cycle management via a holistic Water Sensitivity Urban Design Strategy
- An increase in the urban Tree Canopy from 18% to 30%.

Government Strategies and Targets

The State and Government strategies and policies give impetus to the need to create housing and employment opportunities. This is evident in the Eastern District Plan and the new Greater Sydney Region Plan. The Planning Proposal is in accordance with these strategies in providing significant additional housing (with the potential to include affordable housing) and an increase in dwelling choice in close proximity to transport and employment. The associated increase in population will also stimulate demand for businesses and this will have positive flow-on effects for economic activity and employment in the locality.

Industry Market Overview

The Inner West industrial market is characterised by low levels of demand and new lease activity. This has been a result of subdued investment resulting in a lack of new developments.

With non-food manufacturing increasingly moving off-shore industrial precincts have changed uses over time towards hardware retailing, showrooms, urban support services, transport and warehousing, self-storage facilities and even recreational uses (for example go-kart and paintball at 212 George Street).

The Precinct's peninsula location, poor road access for heavy vehicles and its proximity to sensitive residential areas are significant constraints on its suitability for industrial uses including manufacturing, warehousing or even recreational uses.

Given the Subject Precinct's location close to Concord West train station and the prevalence of residential dwellings, higher density residential with some support services is the higher and better use.

Residential Justification

Anticipated population growth and latent demand for new residential dwellings in the Canada Bay LGA has been driving a major transformation of the area with a notable increase in the level of medium to high density development, particularly around the foreshore. This trend is projected to continue, with demand expected to remain strong through the foreseeable future.

As there are limited opportunities to develop new housing in areas with high amenity and proximity to employment, increasingly industrial and low-density residential sites are being redeveloped to maximise their potential to contribute to a range of government objectives.

From a policy perspective, the Planning Proposal would help to meet the demand for new dwellings. There is also potential to include a component of affordable housing which would also help address housing affordability within the Canada Bay LGA.

Above all the entire precinct is adjacent to the Concord West station. There is a great opportunity to have transit orientated development with all its benefits of increasing public transport ridership, reducing the use of private vehicle trips and promoting sustainable urban growth.

Economic Impacts

Currently the precinct is occupied by the following land uses:

- An industrial building on a half hectare site which is being used by a joinery manufacturing business
- A glass and aluminium processing business on a 809sqm site
- A residential strata complex of 20 apartments (2 storey terrace style)
- Approximately 90 detached cottages.

Table 1 below summarises the economic impact of each scenario.

Table 1: Summary of the Economic Impacts of Planning Proposal

Performance Indicator	Base Case	Planning Proposal
No. of Dwellings	90	1,465
No. of affordable housing apartments	0	59
Total Jobs	53	211
Total Salaries (\$m)	\$3.4m	\$11.6m
Gross Value Added (contribution to gross regional product)	\$5.0m	\$15.1m
Construction Costs		\$700m
Total Economic activity from construction in the Canada Bay LGA		\$1.15bn
Jobs Years directly in Construction in the Canada Bay LGA		1,659
Jobs Years directly and indirectly in Construction in the Canada Bay LGA		2,634
Job Years in construction directly and indirectly across Australia		7,021
Financial benefit to whole of Government from urban renewal		\$216m

Source: HillPDA

When fully developed the Planning Proposal would lead to a net increase in jobs (+158 jobs) and higher total remuneration to workers (+\$8.1m) and higher gross value added (+\$10.2m).

The output value from design and construction would amount to \$700m. Due to multiplier impacts total economic activity generated in the Canada Bay LGA would amount to +\$1.15bn and +1,659 job years would be provided directly in construction.

In addition to contributing to the supply of housing there would be considerable social and economic benefits associated with changing the composition of use of the Precinct from predominantly industrial and low density residential to predominantly high density residential and mixed use:

- Complementing the character of the immediate region, which is predominately residential
- Increasing the number of residents close to employment, retail facilities, amenities and public transport
- Supporting the viability of the main retail and commercial precincts
- Providing housing close to education and recreation facilities.
- Providing housing close to open spaces – particularly Bi-Centennial Park.

The net financial benefit to whole of government from design and construction is estimated to amount to \$216m being GST and stamp duty on the sale of apartments of \$155m, dedication of affordable housing apartments and Section 7.12 contributions of \$58m and \$3.2m in payroll tax during construction.

Social Impacts

The impacts evaluated are outlined in the table below.

Table 2: Categories of impacts

Section	Impacts relating to planning proposal	Description	Impact Characteristic	Social risk rating	Mitigation
10.1	Employment	Substantial increase to the number of jobs available locally, additional workers from the wider region will contribute positively to existing businesses	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.2	Local and Regional Economy	Planning proposal generates additional economic activity during and post construction	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.3	Government revenue	State and local government stand to receive additional revenue from development (~\$238.5m)	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.4	Housing	Planning Proposal would result in a net increase of approximately 1,375 dwellings, making a true contribution to local and regional housing supply	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)

Section	Impacts relating to planning proposal	Description	Impact Characteristic	Social risk rating	Mitigation
10.5	Local amenity	The Planning Proposal seeks additional density beyond the existing controls of the LEP, however it intends to provide the delivery of this density with improved amenity. The provision of public open space and ground floor retail opportunities are likely to create a vibrant precinct that encourages visitation as well reflecting and nourishing the existing identity of Concord West.	Positive, long term, and localised	N/A (positive)	N/A (positive)
		The construction process has the potential to affect the amenity of sensitive receivers within the surrounding area.	Long term, localised, medium severity, medium sensitivity	B3	A range of mechanisms can be applied to minimise any potential construction impacts on amenity. Such mechanisms are employed by most building contractors and implemented through a Construction Management Plan
		Planning proposal would contribute to a socially cohesive community through contributing commercial floorspace and providing substantial revenue to state and local government which can be used towards improving community facilities.	Positive, long term, and localised	N/A (positive)	N/A (positive)
10.6	Community cohesion	The Planning Proposals for new communities have the potential to be isolated and perceived as 'gated' communities. Gated communities can appear exclusive and 'unwelcoming' to surrounding communities and can create community severance and result in social segregation.	Long term, localised, medium severity, medium sensitivity	B3	The provision of commercial floorspace as part of the planning proposal will would increase the opportunities for residents within the Precinct, Concord West and the surrounding suburbs to interact and reduce any perceived barrier effect.
10.7	Health and wellbeing	Health and wellbeing	Positive, long term, and localised		N/A

Section	Impacts relating to planning proposal	Description	Impact Characteristic	Social risk rating	Mitigation
10.8	Social Infrastructure	The existing school and childcare facilities should be able to accommodate the additional residents generated from the planning proposal. However the Planning Proposal will create pressure on existing community facilities which are already somewhat over capacity.	Long term, medium severity and low sensitivity	B3	Council will need to accommodate for additional community facilities to meet demand. It should be noted, however, that there are several community facilities immediately outside of the SA2 which could accommodate the additional demand.
		The Planning Proposal will serve the objectives of the Greater Sydney Region Plan, Eastern City District Plan and YOUR future 2030 by facilitating an improved urban design outcome with substantial residential density close to public transport options (TOD development). This will promote the use of public transport and reduce reliance on private motor vehicles.	Positive, long term, and localised	N/A (Positive)	N/A (Positive)
10.9	Access and connectivity	High density residential developments often result in concerns among the local community regarding parking requirements and additional traffic congestion due to population growth within the locality. Given the low car ownership rates in the locality, the low occupancy rates typical of high-density development and the good accessibility to public transport, the development is not likely to adversely affect local traffic and parking demand.	Long term, low severity and low sensitivity	C1	N/A (Low risk)

Source: HillPDA Research

INTRODUCTION

1.0 INTRODUCTION

HillPDA was commissioned by Dickson Rothschild (the Client) to undertake an economic and social impact assessment (hereafter referred to as 'the study') of a Planning Proposal for the rezoning of land in Concord West hereafter referred to as the Precinct.

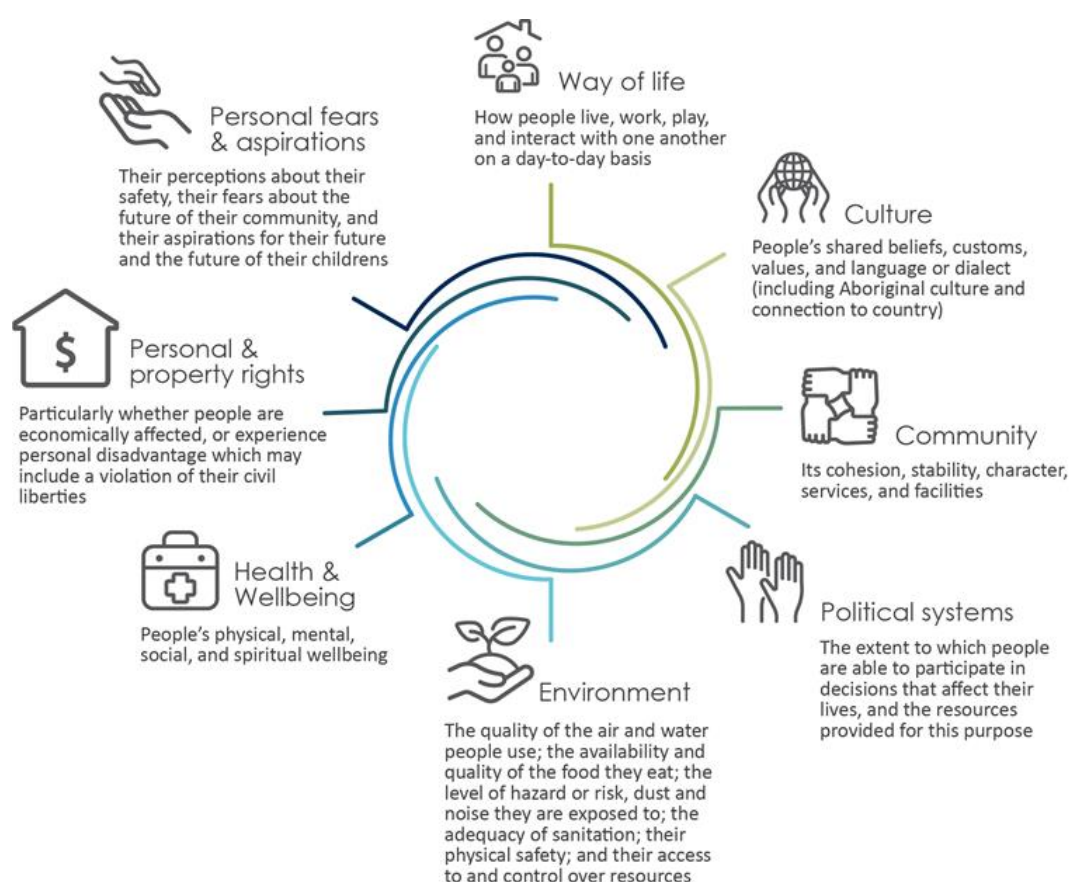
1.1 The study purpose

It is understood that the Client is seeking the rezoning of the Precinct from IN1 General Industrial, R2 Low Density Residential and R3 Medium Density Residential under the Canada Bay Local Environmental Plan (LEP) 2013, to a zone or zones that would allow higher density residential development and shop front commercial space.

The purpose of this study is to provide an economic and social impact assessment of the Planning Proposal. A socio-economic impact can be defined as the net effect of an activity on the local and regional economy, a community and the well-being of individuals and families.

For the purpose of this assessment, social impacts are changes to one or more of the matters identified in Figure 1 and Figure 2.

Figure 1: Social impacts



Source: Adapted from Vanclay, F. (2003). International Principles for Social Impact Assessment. Impact Assessment & Project Appraisal 21(1), 5-11

Figure 2: Social impacts and definitions

The guideline establishes social impacts as arising from changes that impact people in one of nine key areas:

- **way of life**, including:
 - how people live, for example, how they get around, access to adequate housing
 - how people work, for example, access to adequate employment, working conditions and/or practices
 - how people play, for example, access to recreation activities
 - how people interact with one another on a daily basis
- **community**, including its composition, cohesion, character, how it functions and sense of place
- **access to and use of infrastructure, services and facilities**, whether provided by local, state, or federal governments, or by for-profit or not-for-profit organisations or volunteer groups
- **culture**, including shared beliefs, customs, values and stories, and connections to land, places, and buildings (including Aboriginal culture and connection to Country)
- **health and wellbeing**, including physical and mental health
- **surroundings**, including access to and use of ecosystem services, public safety and security, access to and use of the natural and built environment, and its aesthetic value and/or amenity
- **personal and property rights**, including whether their economic livelihoods are affected, and whether they experience personal disadvantage or have their civil liberties affected
- **decision-making systems**, particularly the extent to which they can have a say in decisions that affect their lives, and have access to complaint, remedy and grievance mechanisms
- **fears and aspirations** related to one or a combination of the above, or about the future of their community

Source: NSW Planning & Environment (2017)

These categories correspond to a range of social and environmental matters that could be impacted by the proposed development. The impacts identified for this particular planning proposal and their relation to the key areas as established in the guideline are depicted in the table below.

Table 3: Categories of impacts

Section	Impacts relating to planning proposal	Key Areas
10.1	Employment	Personal property rights
10.2	Local and Regional Economy	Way of Life Personal property rights
10.3	Government revenue	Access to and use of infrastructure, services and facilities
10.4	Housing	Way of life community Personal and property rights
10.5	Local amenity	Way of life Surroundings
10.6	Community cohesion	Community
10.7	Health and well-being	Health and well being
10.8	Social Infrastructure	Access to and use of infrastructure, services and facilities
10.9	Access and connectivity	Way of life Access to and use of infrastructure, services and facilities

Source: HillPDA Research

In addition to assessing the social impacts, this study also explores the economic viability / impact of retaining the current zoning versus amending the zoning to allow for higher density transit orientated development (i.e. the Planning Proposal). The Precinct also includes two existing businesses and the study considers the proposed rezoning of these two sites against the directions set out in the Ministerial 9.2 Section Directions.

1.2 Impact assessment framework

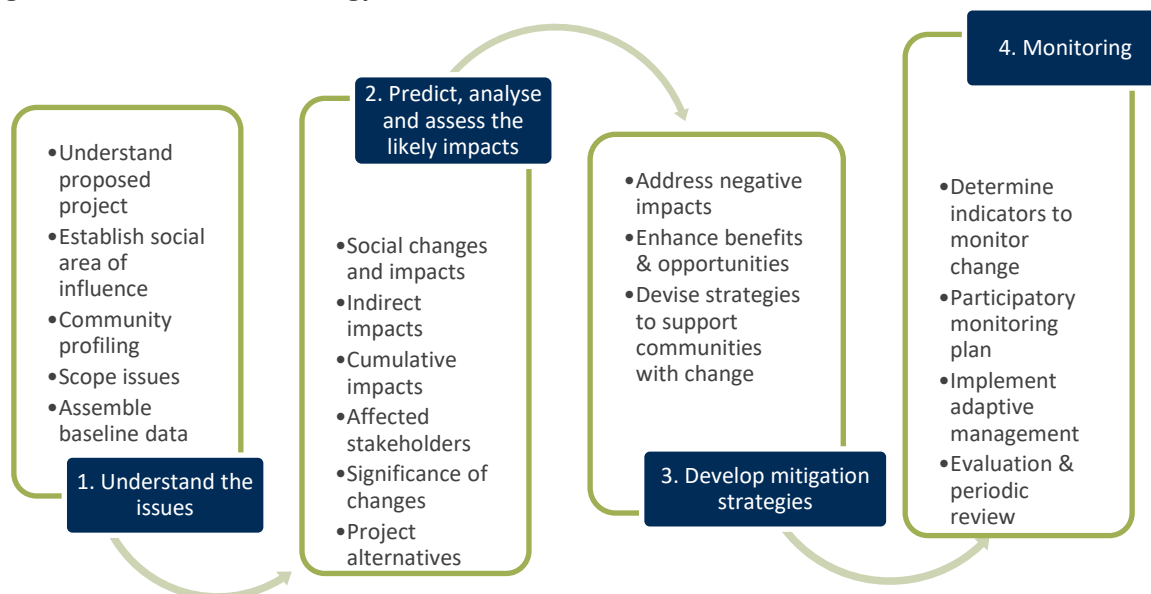
The impact assessment presented in this report identifies and evaluates changes to existing social conditions due to the project. This includes the assessment of direct and indirect benefits and effects/impacts, as well as consideration of any cumulative impacts.

These changes can be **positive** or **negative**; **tangible** or **intangible**; **qualitative** or **quantitative**; **direct**, **indirect** or **cumulative**; and **subjectively experienced**.

The likelihood of social impacts arising from each social and environmental matter assessed as part of the scoping process. NSW DPIE have produced a *Social Impact Assessment Scoping Tool*, which allows for potential changes to social and environmental matters to be identified. Those matters identified as having potential social impacts are then assessed.

Figure 3 reflects the scoping process that was undertaken to estimate the overall significance of impacts prior to performing more detailed assessment. The following sections outline the criteria that underpin each of the assessment components that contribute to the assessment framework. Professional judgement and experience is applied on a case-by-case basis to identify the significance of impact on the social environment.

Figure 3: Assessment methodology



Adapted from Vanclay, F., et al. (2015): p. 7

Table 4 outlines the criteria for rating the material effect of an impact, across the four areas defined in DPIE's guidelines: duration, spatial, severity and sensitivity.

Table 4: Criteria for rating the material effect of an impact

Duration		Spatial Extent		Severity		Sensitivity	
Short term	Less than one year Low frequency	Direct Property	Individual/ household	Negligible	No discernible positive or negative changes to baseline conditions	No impact	No disruption to sensitive people, receivers or receiving environments
	One to six years Medium intermittent frequency		Small number of households		Minimal positive or negative changes to baseline conditions		Some disruption to sensitive people, receivers or receiving environments
	Less than six years Consistent frequency	Suburb	Large part of/ whole community Suburb as defined by ABS	Medium	Moderate positive or negative changes to baseline conditions	High	Significant disruption to multiple sensitive people, receivers or receiving environments
		Municipality	Local Government area or greater	Large	Major positive or negative change to baseline conditions		

Source: NSW DPIE

1.2.1 Level of impact

Table 5 identifies the overall the level of impact rating which is comprised of multiple combinations of duration, spatial and severity outcomes.

Table 5: Level of impact

Category	Significance
Negligible	No discernible positive or negative changes to baseline condition.
Slight	Small change to baseline condition, generally short or short-medium term, confined to a locality or suburb and are able to be mitigated or enhanced.
Moderate	Medium change to baseline condition that may be short, medium, or long term. The spatial extent may vary, however impacts would usually respond to mitigation or enhancement.
Major	Large change to baseline condition usually resulting in medium to long-term effects. Spatial extent is generally at a LGA or regional level with the potential for substantial effects on the social or economic environment. Negative impacts would require extensive mitigation

Source: NSW DPIE

1.2.2 Likelihood of impact

The significance of which potential social impacts and benefits would occur as a result of the proposal is assessed by comparing the level of impact (low, moderate and high) against the likelihood of impact occurring. The criteria used to determine the likelihood of an impact are described in Table 6.

Table 6: Likelihood of impact

Likelihood	Description	Probability
Almost certain	Expected to occur, almost frequently	90 percent
High	Could occur in many instances	70 percent
Possible	Just as likely to happen as not	50 percent
Low	Very limited occurrence	30 percent

Source: NSW DPIE

1.2.3 Significance of impact

Potential impacts are analysed based on the nature of the impact and its predicted severity. A mitigation strategy is proposed if necessary and finally both impacts are assigned a Social Risk Rating (SRR) for a scenario with and a scenario without mitigation. The matrix used to calculate SRR is contained below in Table 7. Using this rating system, the Social Risks for the proposal are assessed as follows:

Table 7: Social risk matrix

			Consequence				
			1	2	3	4	5
			Minimal	Minor	Moderate	Major	Catastrophic
Likelihood	A	Almost certain	A1	A2	A3	A4	A5
	B	Likely	B1	B2	B3	B4	B5
	C	Possible	C1	C2	C3	C4	C5
	D	Unlikely	D1	D2	D3	D4	D5
	E	Rare	E1	E2	E3	E4	E5

Social Risk Rating:  Low  Moderate  High  Extreme

Source: NSW Planning & Environment (2017) | Vanclay, F; Esteves, A; Aucamp, I; Franks, D (2015)

THE PROPOSAL

2.0 THE PROPOSAL

2.1 The Precinct

The Precinct (refer to Figure 4 and 5) is adjacent to the Concord West Railway Station and is situated within the Canada Bay Council Local Government Area (LGA), some 4km east of Sydney Olympic Park and 15km west of the Sydney CBD (drivetime).

The Precinct is defined as the area bounded by Liberty Grove to the north, the railway line to the east, Victoria Avenue Public School to the west and the Westpac building to the south in the suburb of Concord West.

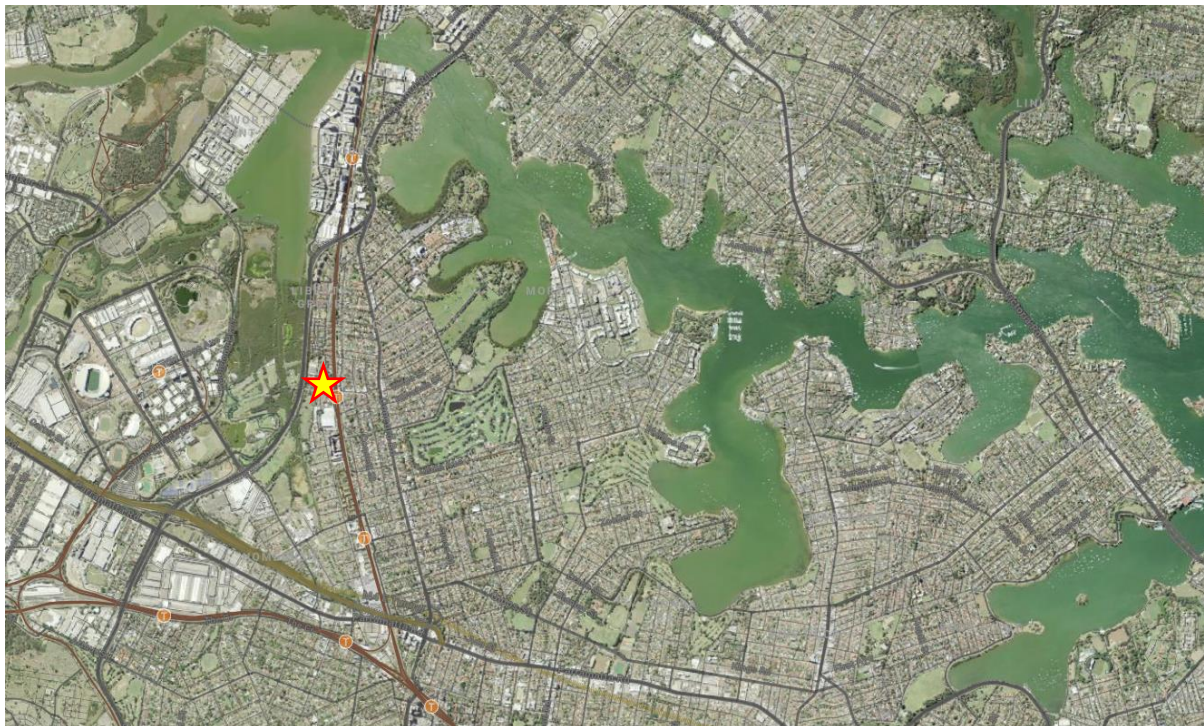
The Precinct spans across 4.6 hectares of land in multiple ownerships excluding public roads, increasing to 6.3 hectares with public roads.

Figure 4: Aerial Image of the Precinct



Source: Six View Maps

Figure 5: The Precinct's Surrounds



Source: Mecone Mosaic; HillPDA

Currently the Precinct is occupied by the following land uses:

- An industrial building on a half hectare site being used by a joinery manufacturing business
- A glass and aluminium processing business on a 809sqm site
- A residential strata complex of 20 apartments (2 storey terrace style)
- Approximately 90 detached cottages.

2.2 The surrounds

The Precinct's surrounds (i.e. within 3km radius) is generally characterised by residential uses, with expansive parklands to the west being Bi-Centennial Park (refer to Figure 6 above). The Precinct is strategically positioned near:

- Strong retail and leisure destinations including Homebush DFO, Sydney Markets (3km) and Sydney Stadium Australia (4.5km);
- Copious recreation spaces including Majors Bay Reserve (1km), Concord Golf Course (800m), Bressington Park (1.2km), Mason Park (1.2km), Bicentennial Park (250m) as well as Sydney Olympic Park's sporting facilities (1.7km); and
- Several educational facilities such as Victoria Avenue Public School (adjacent to Precinct), St Ambrose Catholic Primary School (500m) and Strathfield North Public school (1km)

Immediately surrounding the Precinct, on the north-western boundary of the Precinct, there is an existing warehouse building being used for indoor go-kart and paintball recreation at No. 7 Concord Avenue which is subject to a separate planning proposal. It is understood the development will yield 260 apartments and that gateway has been achieved and it is at the finalisation stage. The area immediately south of the Precinct is the Westpac building and some further industrial uses on the other side of George Street. These parcels are also subject of separate planning proposals which are reflective of a more urban character.

As such, the Precinct is ideally located to accommodate a high density residential with a provision of retail and commercial uses on the lower levels as it acts as a natural transition from the station to the surrounding residential developments.

2.3 Access

Situated adjacent to the Concord West Station, the Planning Proposal would facilitate a Transient Oriented Development (TOD) in a well-connected Precinct. The Precinct has high connectivity to surrounding commercial, leisure and retail precincts and employment precincts with direct services to Redfern, Central, North Sydney, Hornsby, and Epping via the T9 Northern line as well as direct bus services to Parramatta and Macquarie Park. In addition to strong public transport links, the Precinct is also in close proximity to Parramatta Road providing excellent regional and local accessibility to and from the site.

2.4 Planning Proposal

The Planning Proposal would facilitate a mixed-use development comprising medium to high density residential, retail, commercial and community uses.

The planning proposal will provide:

- 1,465 residential apartments across 17 buildings ranging from 6 to 16 stories.
- 2,797sqm of shop front commercial spaces fronting Victoria Avenue near Concord West Station.
- 4% of dwellings for affordable housing
- Significant Public Domain upgrades
- Approximately 3,000sqm of public open spaces in a series of pocket parks and town squares
- Improvement of overland flow and flooding impacts
- Sustainable water cycle management via a holistic Water Sensitivity Urban Design Strategy
- An increase in the urban tree canopy from 18% to 30%.

The preliminary concept site plan is depicted in the figure immediately below.

Figure 6: The Precinct site plan



Source: Dickson Rothschild

CONTEXTUAL REVIEW

3.0 CONTEXTUAL REVIEW

This Chapter undertakes an appraisal of the planning and legislative context for the proposed rezoning based on state, regional and local planning guidelines. It considers matters relating to the proposed rezoning and development from an economic perspective only.

3.1 State Government Plans and Policies

3.1.1 Greater Sydney Region Plan

The Greater Sydney Region Plan, finalised in March 2018, presents a vision where the people of Greater Sydney live within 30 minutes of their jobs, education and health facilities, services and great places.

Concord West is identified as being part of the Eastern Harbour City. The Plan states that:

“Harbour CBD will focus on innovation and global competitiveness to underpin its continued growth.”

“Growth will bring urban renewal and infill development with an increased need for infrastructure and services. The quality of the public realm and access to open space and services are primary considerations for improving liveability.”

Through its objectives, strategies and corresponding analysis, the Region Plan discusses a range of considerations that are relevant to the proposal (see Table 8).

Table 8: Relevant Region Plan considerations

Objective/ Strategy	Extracts from the Plan
<p>Objective 7: Communities are healthy, resilient and socially connected</p> <ul style="list-style-type: none"> Strategy 7.1: Deliver inclusive places for people of all ages and abilities that support healthy, resilient and socially connected communities by: <ul style="list-style-type: none"> providing walkable places with active street life and a human scale co-locating schools, social, health, sporting, cultural and shared facilities. 	<ul style="list-style-type: none"> Active and socially connected people are healthier and better able to adapt to change. Strong social networks help communities respond to the challenges of urban life, such as housing affordability and access to work and education. They give people access to knowledge, resources and opportunities. Great places for people are shaped by healthy and connected communities that share values and trust, and can develop resilience. Street life, meeting and gathering places and emerging sharing and digital networks sustain social networks. Streets allow spontaneous social interaction and community cultural life when designed at a human scale for walkability. Mixed-use neighbourhoods with homes and schools close to centres and public transport improve the opportunities for people to walk and cycle to local shops and services. This has many flow-on benefits including increasing patronage of local businesses and transport, more successful centres and reduced traffic congestion.
<p>Objective 8: Greater Sydney’s communities are culturally rich with diverse neighbourhoods</p> <ul style="list-style-type: none"> Strategy 8.1: Incorporate cultural and linguistic diversity in strategic planning and engagement Strategy 8.2: Consider the local infrastructure implications of areas that accommodate large migrant and refugee populations. 	<ul style="list-style-type: none"> Delivering rich and diverse neighbourhoods requires widespread engagement to develop an understanding of local cultures and needs and to capitalise on community strengths. A place-based planning approach that recognises cultural diversity in communities and responds to the different ways in which people engage and contribute provides increased opportunities for community participation.

Objective/ Strategy	Extracts from the Plan
Objective 10: Greater housing supply	<ul style="list-style-type: none"> The 2016-2021 housing supply target for the Eastern City District is 45,550, and the 2016-2036 target is 157,500 new dwellings.
Objective 12: Great places that bring people together	<p>Strategy 12.1: Using a place-based and collaborative approach throughout planning, design, development and management, deliver great places</p> <ul style="list-style-type: none"> prioritise a people-friendly public realm and open spaces as a central organising design principle recognise and balance the dual function of streets as places for people and movement provide fine grain urban form, diverse land use mix, high amenity and walkability in and within a 10-minute walk of centres integrate social infrastructure to support social connections and provide a community hub recognise and celebrate the character of a place and its people.
Objective 14: A Metropolis of Three Cities – integrated land use and transport creates walkable and 30-minute cities	<ul style="list-style-type: none"> Establish a land use and transport pattern around the metropolis of three cities Co-locate activities in metropolitan, strategic and local centres and attract housing in and around centres to create walkable, cycle-friendly neighbourhoods.
Objective 22: Investment and business activity in centres	<p>Strategy 22.1 Provide access to jobs, goods and services in centres by:</p> <ul style="list-style-type: none"> attracting significant investment and business activity in strategic centres to provide jobs growth diversifying the range of activities in all centres creating vibrant, safe places and a quality public realm focusing on a human-scale public realm and locally accessible open space balancing the efficient movement of people and goods with supporting the liveability of places on the road network improving the walkability within and to centres completing and improving a safe and connected cycling network to and within centres improving public transport services to all strategic centres conserving and interpreting heritage significance designing parking that can be adapted to future uses providing for a diverse and vibrant night-time economy in a way that responds to potential negative impacts creating the conditions for residential development within strategic centres and within walking distance (up to 10 minutes), but not at the expense of the attraction and growth of jobs, retailing and services; where appropriate, strategic centres should define commercial cores informed by an assessment of their need.
Objective 31: Public open space is accessible, protected and enhanced	<p>Strategy 31.1 Maximise the use of existing open space and protect, enhance and expand public open space by:</p> <ul style="list-style-type: none"> providing opportunities to expand a network of diverse, accessible, high quality open spaces that respond to the needs and values of communities as populations grow investigating opportunities to provide new open space so that all residential areas are within 400 metres of open space and all high density residential areas (over 60 dwellings per hectare) are within 200 metres of open space requiring large urban renewal initiatives to demonstrate how the quantity of, or access to high quality and diverse local open space is maintained or improved

Objective/ Strategy	Extracts from the Plan
	<ul style="list-style-type: none"> planning new neighbourhoods with a sufficient quantity and quality of new open space delivering shared and co-located sports and recreational facilities including shared school grounds and repurposed golf courses delivering or complementing the Greater Sydney Green Grid providing walking and cycling links for transport as well as leisure and recreational trips.

Source: Greater Sydney Region Plan, HillPDA

3.1.2 Eastern District Plan

The Eastern District Plan maps out the 20-year vision for the Eastern District of Greater Sydney. Canada Bay LGA is the western end of the district. By 2036 it is projected that the District will have a population of 1.338 million, representing an additional 325,050 persons over the 20 year period from 2016.

To house this growth an additional 624,000 dwellings are required representing an average annual rate of 36,250 dwellings. Specifically, the District Plan targets an additional 48,650 dwellings to be provided over the next five years.

Another key focus of the plan is housing diversity and affordability. The plan identifies a number of measures to improve affordability across the continuum. The key measure is to target 5-10% affordable housing for new developments. Also Planning Priority E5 is about providing housing supply, choice and affordability, with access to jobs, services and public transport.

The plan recognises the changing nature of household composition, with the number of single-person households is projected to increase by 61,000 households and couple-only households increasing by 31,750 to 2036. Multi-unit dwellings can provide important housing for seniors and more affordable homes for young people. This needs to be balanced with medium density row, terrace and villa homes that provide diversity, especially for larger households. A diverse mix of housing can provide greater opportunities to cater for a range of changing needs.

The plan highlights the need for a place-based approach to housing, meaning new housing must be in the right places to meet demand for different housing types, tenure, price points, preferred locations and design. Supply must be coordinated with infrastructure to ensure pedestrian, cyclist and public transport connections to shops, services and public transport.

The Greater Sydney Region Plan and Eastern City District Plan are to be taken into consideration when preparing strategic planning documents including planning proposals.

3.1.3 Section 9.1 (2) Ministerial Directions (formerly S117.2)

Section 9.1 (2) relates to Business and Industrial zones. The objectives of the direction are as follows:

- Encourage employment growth in suitable locations
- Protect employment land in business and industrial zones
- Support the viability of identified strategic centres.

This Direction applies when a planning proposal would affect land within an existing or proposed business or industrial zone. As such this report will address the five key requirements of Section 9.1, these being:

- a) give effect to the objectives of this direction

- b) retain the areas and locations of existing business and industrial zones,
- c) not reduce the total potential floor space area for employment uses and related public services in business zones,
- d) not reduce the total potential floor space area for industrial uses in industrial zones, and
- e) ensure that proposed new employment areas are in accordance with a strategy that is approved by the Secretary of the Department of Planning and Environment.

The following table assesses the consistency of mixed use development in the Precinct, against the five key requirements of the Direction for strategies concerning employment lands.

Table 9: Consistency of Planning Proposal with Section 9.1 (2) Business & Industrial Zones

Relevant Matters	Comment and Consistency
Objectives of the Direction	The planning proposal would result in a net loss in land zoned IN1 General Industrial. This relates to only one parcel of land at 202 George Street, which is half a hectare in size. 202 George Street has little opportunity for employment growth or intensification. It comprises of Printer and Printing Servicing business under the business entity name of Graphic Overprint and is likely to be employing no more than 31 workers. The planning proposal would generate additional demand for retail and business services which would help to support the viability of identified strategic centres.
Retain existing business and industrial zones	The proposed rezoning would result in a loss of 0.5ha of industrial zoned land. However the site is isolated from other industrial lands given that the few remaining parcels of industrial land in the locality are also the subject of rezoning. As with the other industrial parcels the industrial site has poor access for heavy vehicles, is surrounded by residential homes and fronts a residential street. This impacts its ongoing suitability for industrial uses. From a future supply perspective, the Precinct represented 1.68% of the existing supply of employment lands (land zoned B5, B6, B7 and IN) in Canada Bay in 2015 and less than 0.1% of the supply in the Eastern City District ¹ .
No net loss of potential floorspace for employment uses and related public services in business zones	Graphic Overprint is not in a business related zone. The Glass and Aluminium engineering business is in a B1 Neighbourhood Centre zone. The masterplan proposes mixed use on this site with ground floor commercial space. Combined with additional space on both sides of Victoria Avenue in Blocks 4 and 7 results in a net increase in commercial space of at least 2,000sqm.
Not reduce the potential floorspace area for industrial uses in industrial zones	The proposed rezoning would result in a potential loss of approximately 3,000sqm of industrial floorspace being the Graphic Overprint business. However the site is under capitalising the value of the land being 230m from the train station and surrounded by residential. Proposed mixed use development will provide a net increase in jobs in a transit orientated development.
In accordance with a Strategy approved by the Secretary of DPIE	The proposed rezoning and subsequent mixed use development responds to and accords with the indicative targets for population, housing and employment growth set out in the Greater Sydney Region Plan and the Eastern District Plan.

Source: HillPDA Research

3.1.4 State Environmental Planning Policy (Affordable Rental Housing) 2009

The ARH SEPP 2009 aims to facilitate affordable rental housing through incentivising private and public development by way of expanded permissibility, FSR bonuses and non-discretionary development standards.

¹ NSW Department of Planning & Environment: Employment Lands Development Monitor, 2020

Additionally, the ARH SEPP 2009 seeks to retain and mitigate the loss of existing affordable housing stock, expand the development role of not-for-profit housing providers and locate affordable housing near local businesses for workers.

There is an opportunity for the Planning Proposal to address this issue by providing 4% of the apartments for affordable housing as set out in Council's Draft Affordable Housing Scheme.

3.1.5 Future Transport Strategy 2056

The Future Transport Strategy has been developed to align with the Greater Sydney Plan. It is an overarching strategy, supported by a suite of plans to achieve a 40 year vision for the transport system. The outcomes of the plan relevant to the proposal are:

- Walking or cycling is the most convenient option for short trips around centres and local areas, supported by a safe road environment and suitable pathways
- Vibrant centres supported by streets that balance the need for convenient access while enhancing the attractiveness of our places
- 30 minute access for customers to their nearest metropolitan city centre and strategic centre by public transport seven days a week.

3.2 Local Policies and Guidance

3.2.1 City of Canada Bay Local Strategic Planning Statement (LSPS) 2020

The LSPS is the leading strategic planning document for the Canada Bay LGA. It aims to guide the character of centres and neighbourhoods, by describing present conditions, predicting future conditions and identifying what Council should do to preserve and enhance the lifestyle of residents. The following planning priorities are of relevance to this proposal:

- Providing community services and facilities to meet people's changing needs
- Foster safe, healthy, creative, culturally rich and socially connected communities
- Provide housing supply, choice and affordability in key locations. The Precinct has been identified as urban renewal area in the Plan.
- Provide high quality planning and urban design outcomes for key sites and precincts

The site is not identified under this planning priority, however the proposal supports the intent of this planning priority, adding high quality open spaces and architecturally designed buildings, enhancing the overall design quality of the Precinct.

This priority emphasises the importance of a place based planning approach that prioritises a people-friendly public realm and enables issues to be addressed in an integrated, coordinated way to achieve the economic, social and environmental potential of a place.

3.2.2 City of Canada Bay Local Housing Strategy (LHS) 2019

The Canada Bay LHS is a strategy that has been prepared to guide future housing supply in the LGA. The strategy analyses the population, demographic and supply issues associated with the delivery and take up of housing and is intended to assist Council in developing an understanding of what it could do to plan for and deliver optimal residential outcomes for the community.

Under the priorities identified within the LHS, the Precinct is identified as a major development area expected to accommodate some significant apartment development over the next 20 years. The following related actions are identified:

- Ensure that apartment dwelling yields are comprised of sufficient dwelling diversity
- Encourage the development of larger apartments in centres and urban renewal precincts such as the Precinct to encourage more multi-generational living in the precincts.

The proposal will increase the supply of apartments in the precinct thereby addressing and supporting a diverse range of housing typologies, whilst facilitating multi-generation living in the area.

3.2.3 Your future 2030 (2018)

Your future 2030 is the community strategic plan for the future of the City of Canada Bay. The plan reflects the aspirations and priorities of the community that were identified following community and stakeholder engagement in the area. The plan identifies themes, goals and strategies that will provide direction for the delivery of outcomes from 2018 until 2030.

Based on the consultation undertaken the plan identifies five key themes and a vision for each theme that summarises the aspiration and priorities identified by the community for the future of City of Canada Bay Council. The relevant theme and vision are identified in Table 10.

Table 10: Your future 2030

Theme	Goal	
Theme 1: Inclusive, involved and prosperous	1.1.1	Promote Disability Inclusion to enhance positive community attitudes and behaviours and improved access to create a more liveable community for people with disability.
	1.1.2	Provide Children and Family services and facilities to support children's and families' health, education and welfare.
	1.2.2	Provide quality active and passive Recreation Services and Facilities that contribute to health and wellbeing
	1.2.3	Provide Community Facilities that are accessible and available for use by all members of the community
	1.2.4	Plan for a diversity of housing across the full range of income levels, including Affordable Housing to support people who work in essential services.
Theme 2: Environmentally responsible	2.2.1	Plan for, and maintain, Parks and Open Space to provide active and passive recreation opportunities for everyone's enjoyment.
Theme 3: Easy to get around	3.2.1	Advocate and provide for accessible Public Transport and related infrastructure that meets the community's needs.

Source: Your Future 2030

The strategy identifies that the LGA will need to cater for a further 30,000 people in the next 20 years which means there is a need to supply housing for purchase and rental across a range of income levels to ensure a broad cross-section of the community can enjoy living and working in the City. With new residential dwellings expected to be mostly in high-rise apartments, parts of the urban environment of Canada Bay will experience change. It will be important to plan for shared facilities and public spaces that provide quality places.

3.2.4 Concord West Precinct Masterplan 2014

This master plan was prepared by JBA on behalf of City of Canada Bay Council (Council). It relates to land on the western side of the Northern Rail Line at Concord West. The master plan is focused on land zoned IN1, General Industrial, which has been identified for redevelopment to residential uses by the City of Canada Bay Council. The aim of the study is to create new planning controls to guide the future development of sites zoned for industrial use within the study area. The objective of the strategy is to integrate new medium density apartment forms within a neighbourhood that is predominantly 1-2 storey residential in scale.

3.2.5 City of Canada Bay Community Resourcing Strategy 2011

The Strategy was completed on behalf of the City of Canada Bay Council by Cred Community Planning. At the time of the report's completion, the City of Canada Bay had access to a total of 124 community facilities in the LGA. Thirty seven (or 30%) of these were owned by Council or under its care and control. A number of key issues to Council's facilities were identified. Those relating to Concord West included:

- Single purpose, ageing and inflexible facilities. Owning and maintaining a large number of single-purpose facilities is not financially viable in the long-term and does not support the efficient use of resources
- Other than libraries, there are no appropriate spaces for the delivery of programs or services for young people
- Many facilities are not located near public transport and this also affects utilisation – particularly for young people and older people
- Council accommodates nine early childhood education and care services. The facilities are presently in good condition and asset management plans have been produced to guide Council in the management of the maintenance and capital investment in existing centres.

COMMUNITY PROFILE

4.0 COMMUNITY PROFILE

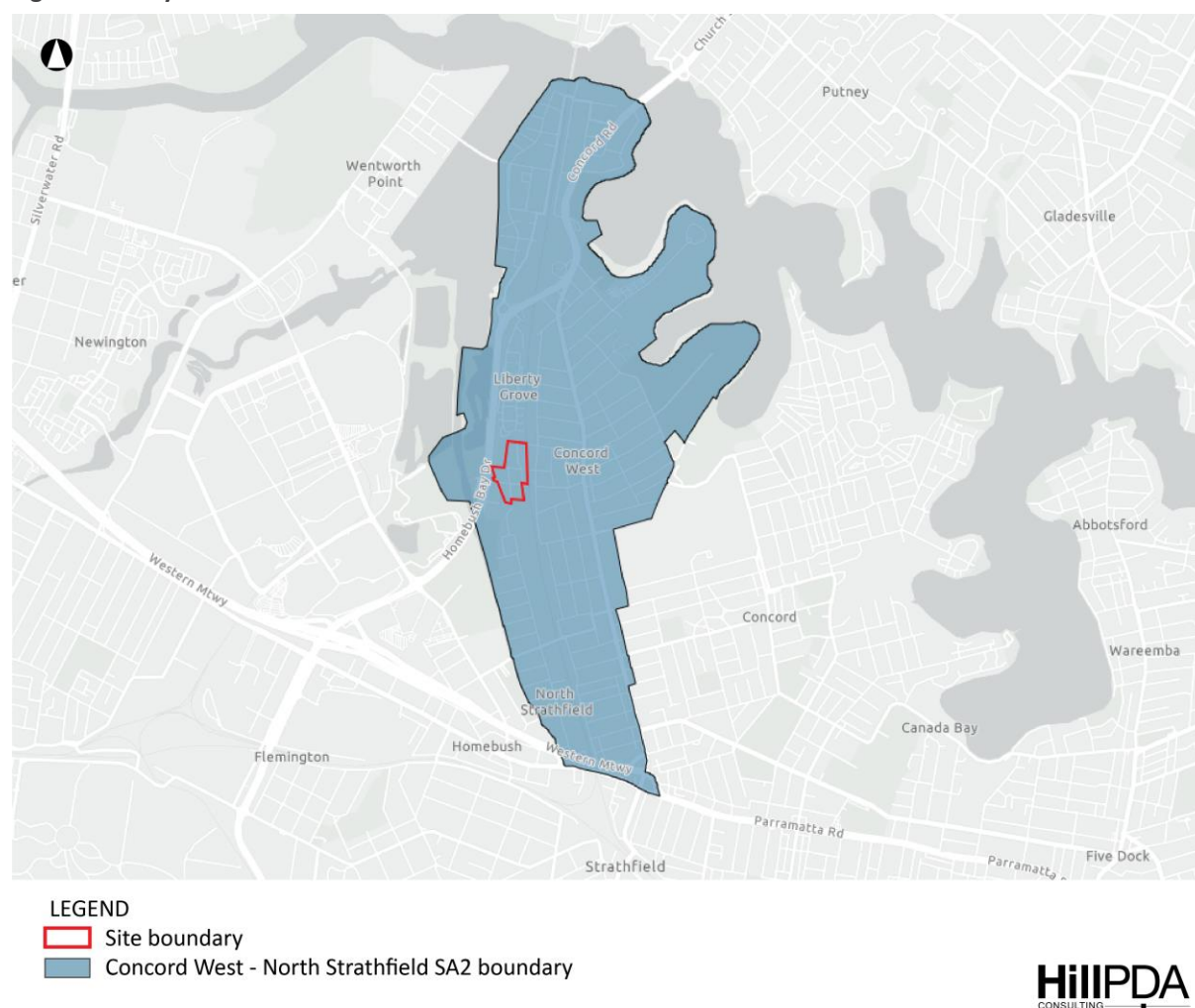
The section provides a snapshot of the socio-economic characteristics of the study area to better understand the underlying and emerging social needs of the community and potential social and economic impacts of the proposed development.

4.1 Study area

For the purpose of this analysis, the study area has been defined using the Concord West - North Strathfield (SA2) from the Australian Census of Housing and Population (ABS) 2016 (the boundary is shown in the figure below). To provide context and highlight the uniqueness of the location; comparisons are made against Greater Sydney.

Population, employment and workforce numbers by the Transport Performance and Analytics (TPA) have also been provided.

Figure 7: Study area



Source: HillPDA

4.2 Demographic characteristics

Table 11 identifies the population age distribution. As of 2016, the age distribution across the study area reflected a lower proportion of school-aged children (about 10 per cent) when compared to Greater Sydney (about 16 per cent). The precinct contained a higher proportion of residents within the 18-24 years age cohort, at about 15 per cent which is significantly more than Greater Sydney (about 10 per cent). The precinct also contained a higher proportion of residents within the 25-34 years age cohort, at about 30 per cent which is significantly more than Greater Sydney at 16 per cent. Greater Sydney recorded a higher proportion of residents over the age of 60 (about 19 per cent) compared to the study area at just over 11 per cent.

Table 11: Population age distribution by service group

Age distribution	Study area		Greater Sydney	
	Number	Per cent	Number	Per cent
Babies and pre-schoolers (0 to 4)	1,475	7.0	310,174	6.4
Primary schoolers (5 to 11)	1,210	5.7	424,351	8.8
Secondary schoolers (12 to 17)	797	3.8	334,059	6.9
Tertiary education and independence (18 to 24)	3,085	14.6	460,823	9.6
Young workforce (25 to 34)	6,305	29.9	774,406	16.1
Parents and homebuilders (35 to 49)	3,939	18.7	1,017,800	21.1
Older workers and pre-retirees (50 to 59)	1,806	8.6	587,374	12.2
Empty nesters and retirees (60 to 69)	1,404	6.6	455,985	9.5
Seniors (70 to 84)	896	4.2	363,016	7.5
	200	0.9	96,023	2.0

Source: ABS Census 2016, Community profile, 2017 release

Need for assistance refers to people who need help or assistance in one or more of the three core activity areas of self-help, mobility or communication due to disability, a long term health condition or old age (ABS, 2016). People in this group may be more vulnerable to changes from the project, such as changes in local access, including to community services and facilities, effects associated with property acquisition, including loss of social and community networks, and changes in local amenity (that is, increased noise, dust and vibration). As identified in the table below, the study area recorded a relatively low proportion (around 3.1%) of people who reported needing assistance compared to Greater Sydney (around 4.9%).

Table 12: Need for assistance and dependents

Need for assistance	Study Area		Greater Sydney	
	Number	Per cent (%)	Number	Per cent (%)
Need for assistance	653	3.1	236,139	4.9
Children aged 0–14	2,885	13.7	900,301	18.7
People aged 65+ years	1,900	8.9	672,563	13.9

Source: ABS Census 2016, Community Profile, 2017 release

Table 13 identifies that the proportional distribution of households within the study area. Family households generally comprise around 70 per cent of dwellings, which is similar to Greater Sydney at 73 per cent. Lone person households at around 30 per cent are higher than Greater Sydney at 21 per cent. At around 19 per cent, group households is significantly higher than Greater Sydney at 0.4 per cent.

Table 13: Household characteristics

Household tenure	Study Area		Greater Sydney	
	Number	Per cent	Number	Per cent
Family households	6,290	70.3	1,191,930	73.7
Lone person households	1,689	18.9	348,560	21.6
Group households	965	10.8	76,324	4.7
Total	8,944	100.0	948,988	100.0

Source: ABS Census 2016, Community Profile, 2017 release

4.2.1 Social Advantage and Disadvantage

The Socio-Economic Indexes for Areas (SEIFA) has been developed by the ABS to provide an overview of social and economic wellbeing and welfare of communities across a range of spatial scales. The SEIFA measures the relative level of socio-economic advantage and disadvantage based on various census characteristics, such as income, education, unemployment and occupations. In the context of this Index, a lower score indicates an area that is relatively disadvantaged compared to an area with a higher score.

The table below identifies the index rankings and quantiles.

Table 14: SEIFA rankings and quartiles

Measure	
Rank	To determine the rank of an area, all the areas are ordered from lowest score to highest score. The area with the lowest score is given a rank of 1; the area with the second-lowest score is given a rank of 2 and so on, up to the area with the highest score which is given the highest rank.
Decile	Deciles divide a distribution into ten equal groups. In the case of SEIFA, the distribution of scores is divided into ten equal groups. The lowest scoring 10% of areas are given a decile number of 1, the second-lowest 10% of areas are given a decile number of 2 and so on, up to the highest 10% of areas which are given a decile number of 10.
Percentile	Percentiles divide a distribution into 100 equal groups. In the case of SEIFA, the distribution of scores is divided into 100 equal groups. The lowest scoring 1% of areas are given a percentile number of 1, the second-lowest 1% of areas are given a percentile number of 2 and so on, up to the highest 1% of areas which are given a percentile number of 100.

Table 15 below presents the SEIFA results for Concord West - North Strathfield SA2. The SA2 is ranked highly in all four indexes. The SA2 is within the top 15 percent for advantage and disadvantage in Australia and NSW and The SA2 is located within the top 10 percent of all SA2's for access to education and occupation.

Table 15: Concord West - North Strathfield SA2 SEIFA score

	AUSTRALIA			NSW		
	Rank	Decile	Percent	Rank	Decile	Percent
Advantage and disadvantage	1,782	9	85	442	9	85
Disadvantage	1,713	9	82	431	9	83
Economic resources	1,057	6	51	299	6	58
Education and occupation	1,895	9	90	471	10	91

Source: ABS (2016)

4.3 Existing workers

At the time of the 2016 Census, there were over 19,043 individuals employed within the Concord West – North Strathfield SA2. The table below shows the industries employing workers within the area. Health care and social assistance was the largest industry of employment with 20 per cent of the local workforce, likely owing to the presence of Concord Hospital in the study area. This was closely followed by financial and insurance services with 19 per cent. This second figure is likely a reflection of the preponderance of financial sector businesses within Rhodes, primarily in the areas near the existing town centre and shopping centre. Notably, the breakdown of jobs in the area is not reflected in the employment profile of the local population.

Table 16: Comparison of the proportion of workers by industry in the study area and Greater Sydney

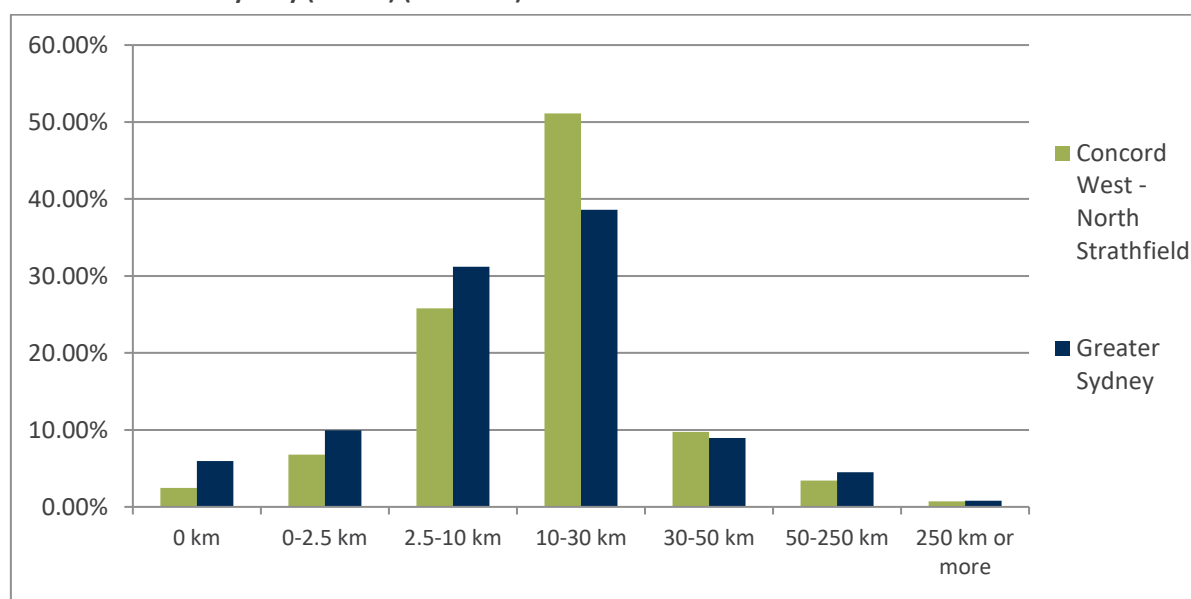
Industry classification (ANZSIC)	Concord West – North Strathfield (SA2)		Greater Sydney (GCCSA)	
	Total	Per cent	Total	Per cent
Agriculture, Forestry and Fishing	3	0.02%	9,082	0.43%
Mining	10	0.05%	5,000	0.24%
Manufacturing	1,760	9.25%	131,076	6.25%
Electricity, Gas, Water and Waste Services	221	1.16%	17,686	0.84%
Construction	841	4.42%	152,243	7.26%
Wholesale Trade	1,517	7.97%	81,964	3.91%
Retail Trade	1,075	5.65%	210,614	10.04%
Accommodation and Food Services	1,038	5.45%	150,464	7.17%
Transport, Postal and Warehousing	602	3.16%	110,271	5.26%
Information Media and Telecommunications	546	2.87%	62,824	3.00%
Financial and Insurance Services	3,562	18.71%	145,783	6.95%
Rental, Hiring and Real Estate Services	333	1.75%	44,013	2.10%
Professional, Scientific and Technical Services	1,582	8.31%	222,973	10.63%
Administrative and Support Services	474	2.49%	72,938	3.48%

Industry classification (ANZSIC)	Concord West – North Strathfield (SA2)		Greater Sydney (GCCSA)	
	Total	Per cent	Total	Per cent
Public Administration and Safety	149	0.78%	125,602	5.99%
Education and Training	581	3.05%	181,227	8.64%
Health Care and Social Assistance	3,722	19.55%	258,810	12.34%
Arts and Recreation Services	156	0.82%	36,736	1.75%
Other Services	862	4.53%	77,933	3.72%

Source : ABS (2016)

This difference in the industries employing residents compared to workers in the area is additionally explained in the figure below, which shows that workers in Concord West – North Strathfield overwhelmingly lived outside of the immediate area. Furthermore, despite the number of jobs located close to housing in the area, fewer than 10 per cent of workers employed in the area resided within 2.5 kilometres of their workplace, which is lower than the average for Greater Sydney.

Figure 8: Distance from work for workers employed within Concord West – North Strathfield (SA2) and Greater Sydney (GCCSA) (ABS 2016)



Source: ABS (2016)

Mode of travel data is based upon the mode of travel to place of work for the respondent on the day of the Census. On the day of Census 2016, workers commuting to Concord West – North Strathfield SA2 generally commuted by car, with almost two thirds of workers driving. Twenty-three per cent commuted by train, which is above the average for Greater Sydney.

Table 17: Comparison of mode of travel to work amongst workers in Concord West – North Strathfield (SA2) and Greater Sydney (GCCSA) on the day of the census (ABS 2016)

	Concord West – North Strathfield (SA2)		Greater Sydney (GCCSA)	
	Total	Per cent	Total	Per cent
Train	4,106	23.35%	369,368	19.26%
Bus	352	2.00%	136,740	7.13%
Ferry	3	0.02%	8,973	0.47%
Tram	6	0.03%	3,152	0.16%
Taxi	40	0.23%	6,254	0.33%
Car, as driver	11,453	65.14%	1,160,466	60.51%
Car, as passenger	605	3.44%	85,266	4.45%
Truck	46	0.26%	14,889	0.78%
Motorbike/scooter	125	0.71%	14,778	0.77%
Bicycle	93	0.53%	16,353	0.85%
Walked only	668	3.80%	90,853	4.74%
Other Mode	85	0.48%	10,598	0.55%

Source: ABS (2016). Note: Excludes nil distance, non-responses and “worked from home”

4.4 Business statistics

At 30 June 2017, there were 2,809 registered businesses in Concord West – North Strathfield SA2. Of those businesses, 18 per cent were rental, hiring and real estate services, followed by construction businesses which made up 14 per cent. However, further investigation of ABS data reveals that of the 495 registered rental, hiring and real estate services businesses, 416 are non-employing businesses. The largest employing businesses in the area are businesses classified as professional, scientific and technical services (16 per cent), followed by construction (14 per cent) and accommodation and food services (13 per cent).

Table 18: Proportion of businesses registered in Concord West - North Strathfield SA2 (excludes non-employing businesses)

Concord West – North Strathfield (SA2)		
Industry	Total (no.)	Per cent
Professional, Scientific and Technical Services	167	15.61%
Construction	154	14.39%
Accommodation and Food Services	141	13.18%
Health Care and Social Assistance	87	8.13%
Rental, Hiring and Real Estate Services	81	7.57%
Wholesale Trade	77	7.20%
Retail Trade	75	7.01%
Administrative and Support Services	71	6.64%
Financial and Insurance Services	47	4.39%
Other Services	37	3.46%
Manufacturing	34	3.18%

Concord West – North Strathfield (SA2)		
Industry	Total (no.)	Per cent
Transport, Postal and Warehousing	33	3.08%
Information Media and Telecommunications	16	1.50%
Currently Unknown	14	1.31%
Education and Training	14	1.31%
Arts and Recreation Services	9	0.84%
Electricity, Gas, Water and Waste Services	8	0.75%
Public Administration and Safety	5	0.47%

Source: ABS (2016)

4.5 Other characteristics

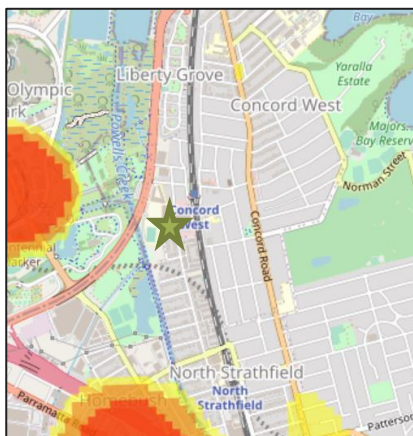
4.5.1 Crime “Hot Spots”

The following page shows crime ‘hotspot’ maps for Rhodes and surrounding suburbs. These maps are based on Bureau of Crime Statistics and Research (BOSCAR) data for six of the most prevalent crime types, and show locations where these crimes are particularly prevalent in relation to the site.

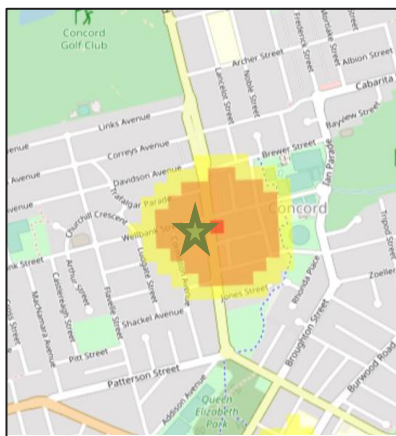
It can be seen that Concord West forms part of larger hotspots for theft, break and enter (affecting dwellings), and non domestic assault. The other maps show there have been few incidents of other types of crime in that period.

Figure 9: Crime 'hotspot' maps Concord West and surrounding suburbs

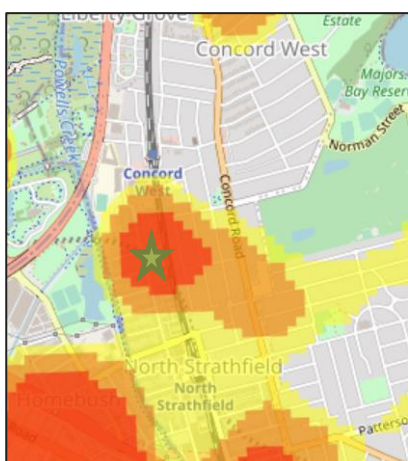
Domestic Assault



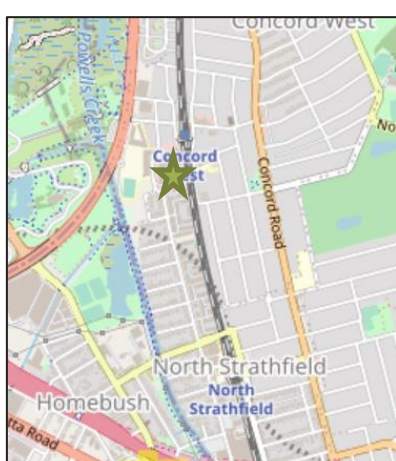
Non Domestic Assault



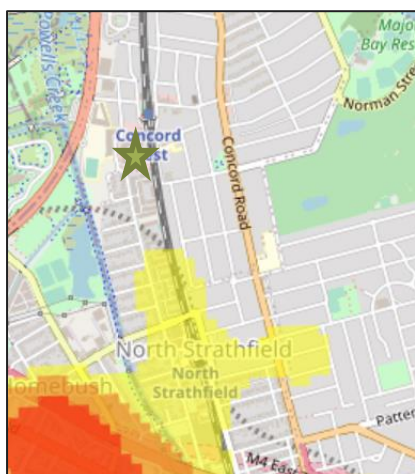
Break and enter dwelling



Break and enter non dwelling



Malicious damage to property



Robbery



The Precinct

Density
■ High
■ Medium
■ Low

Source: Bureau of Crime Statistics and Research (BOSCAR) data

4.5.2 Summary of key findings

- The Precinct is located in the Concord West - North Strathfield SA2 which had a population of 28,859 in 2016
- The median age of the Concord West - North Strathfield SA2 was 31 which is marginally lower than Greater Sydney (36)
- Concord West - North Strathfield SA2 is characterised by a high proportion of people aged 15-29 (32%) than Greater Sydney (21%), lower proportion of children aged 0-14 (14%) compared to Greater Sydney (19%) and the SA2 had a significantly lower proportion of people aged 65 years and over
- The total age dependency ratio measures the number of dependents (aged 0 - 14 and aged 65+), to the total population of working age (15 to 64). As the ratio increases there may be an increased burden on the working population to financially maintain the economically dependent. At 0.22 the Concord West - North Strathfield SA2 had a lower dependency ratio than Greater Sydney (0.33)
- There was a large number of family households in Concord West - North Strathfield SA2 (70%) and a larger proportion of group households (11%) than Greater Sydney (5%). Average occupancy rate (2.7 persons per dwelling) was slightly lower than Greater Sydney (2.8) due largely to the higher proportion of couple households without children
- Home ownership within the Concord West - North Strathfield SA2 (51%) is low compared to Greater Sydney (64%)
- Dwelling diversity within the Concord West - North Strathfield SA2 is limited with apartment dwellings comprising of 67% of the SA2s overall housing stock and separate houses comprising of 26% of the overall housing stock
- The median weekly income in the Concord West - North Strathfield SA2 (\$773 personal and \$1,860 per household) was high when compared to Greater Sydney (\$719 personal and \$1,750 household)
- The Concord West - North Strathfield SA2 scored high on the SEIFA index which indicates the area is relatively socio-economically advantaged and crime rates were low
- The top five industries of employment were professional, scientific and technical services (15%), financial and insurance services (11%), health care and social assistance (11%) and education and training (8%).
- Crimes of break and enter and non domestic assault are prevalent in the area.

FUTURE
GROWTH

5.0 FUTURE GROWTH

This section examines likely levels of future population growth in the Concord West and the surrounding area, having regard to the proposed number of lots.

5.1 Study area population and employment projections

The Transport for NSW forecast projects that the population of the Concord West – North Strathfield SA2 will increase to over 43,300 persons by 2036, representing an increase of approximately 17,340 persons or 67% over its 2016 base population of projection of 25,973 residents.

Workforce refers to the number of workers projected to be resident within the district, while employment refers to the number of jobs projected in the district.

Employment in the SA2 is forecast to increase significantly from 23,183 jobs to 30,184 jobs by 2036. This represents an increase of approximately 7,000 jobs or 30% over the period. Similarly, the workforce in the SA2 is forecast to increase by almost 8,700 jobs over this period to over 22,800 in 2036. The table below summarises the projected change in demographic indicators for the study area.

Table 19: Concord West North Strathfield SA2 - Population and employment projections

	2016	2036	Change	% Change
Population	25,973	43,310	17,337	67%
Employment	23,183	30,184	7,001	30%
Workforce	14,117	22,810	8,693	62%

Source: Transport Performance and Analytics (2019), Release Date September 2020

5.2 Projected population in the Precinct

Assuming 2.5 persons per dwelling² and 4% of dwellings are unoccupied, HillPDA estimates that 3,516 persons would be living in the Precinct following completion of urban renewal.

5.3 Future community

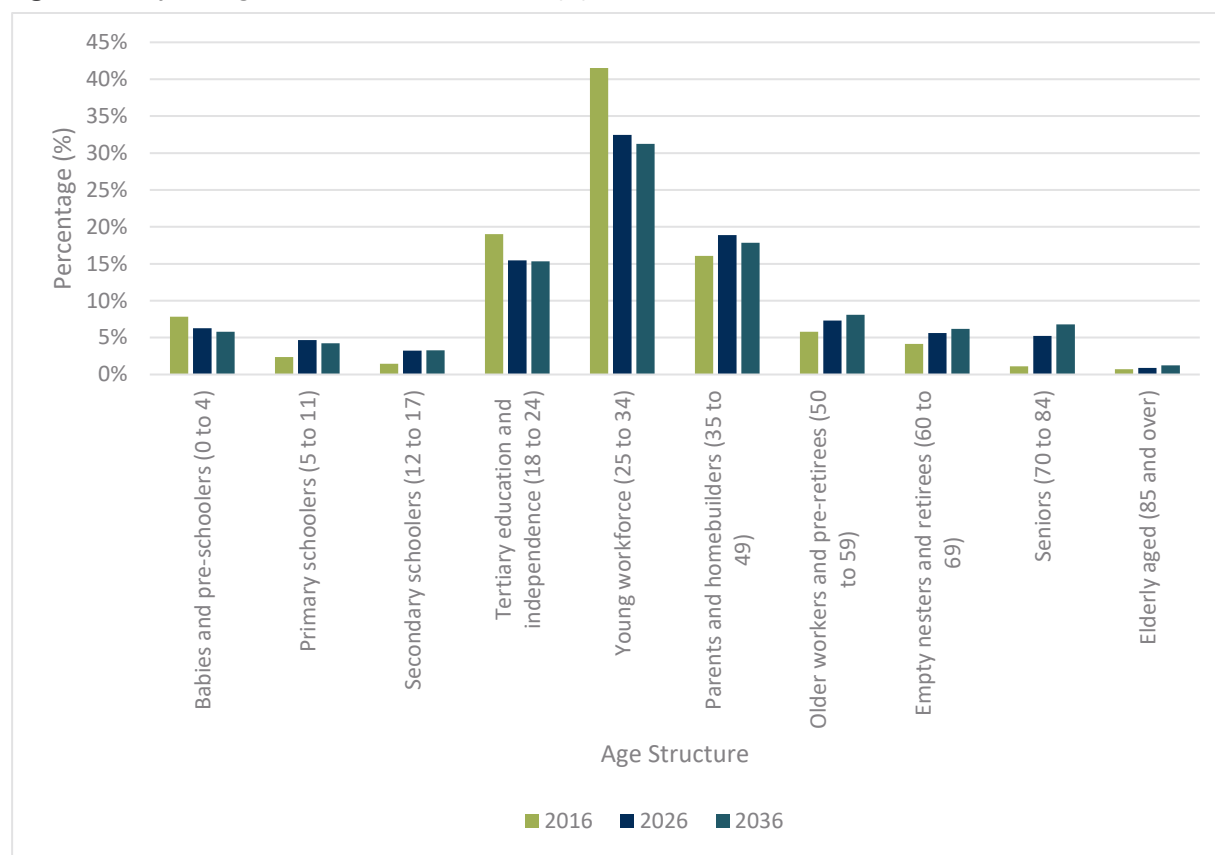
Knowledge of the likely demographic age breakdown is essential when planning for age related social infrastructure such as child care services, aged care and sport and recreation facilities.

In projecting the age structure of the future population of the Precinct, HillPDA has applied the age structure proportions for Rhodes small area as prepared for City of Canada Bay Council by Forecast.id to the proposed number of apartments. Rhodes has been selected as it contains a high number of residential apartments, similarly to the proposed development.

This projected age structure identified in is based on the current age of the population, migration (in and out), existing residential developments and anticipated amount and type of residential development.

² Source: ABS Concord West – North Strathfield SA2 General Community Profile (2016)

Figure 10: Projected age structure for Rhodes in 2036 (%)



Source: HillPDA adapted from City of Canada Bay Council forecast.id for Rhodes. Data viewed on 22 March 2021

The future age structure forecasted for Rhodes is indicative of an ageing population, between 2016 and 2026 the number of persons aged over 60 is expected to increase by 151% and comprise 11.7% of the total population. The number of persons aged under 17 is forecast to increase by 55% and will comprise 14.2% of the total population.

Table 20 illustrates demographic trends by service groups predicted for the proposed Precinct based on the 2036 population characteristics for Rhodes.

Table 20: Population projections by service groups

Service group	Number	%
Babies and pre-schoolers (0 to 4)	204	5.8
Primary schoolers (5 to 11)	148	4.2
Secondary schoolers (12 to 17)	116	3.3
Tertiary education and independence (18 to 24)	538	15.3
Young workforce (25 to 34)	1,101	31.3
Parents and homebuilders (35 to 49)	626	17.8
Older workers and pre-retirees (50 to 59)	285	8.1
Empty nesters and retirees (60 to 69)	218	6.2
Seniors (70 to 84)	237	6.8
Elderly aged (85 and over)	44	1.3
Total persons	3,516	100

Source: HillPDA, adapted from Forecast.id

Based on the above assumptions, the population projections suggest:

- The largest service age group in 2036 is forecast to be 1,010 'Young workforce (25 to 34)', which will account for 31% of total persons
- The proportion of babies and children under 5 years (about 6%) would be generally in line with Greater Sydney (6.8%) resulting in about 204, which would increase the demand for childcare in the locality
- There will be growth (about 7.5%) among children of school going age (5-17) which would increase demand for primary and secondary schooling.

SOCIAL
INFRASTRUCTURE
ADUIT

6.0 SOCIAL INFRASTRUCTURE AUDIT

The following section provides an overview of the social infrastructure and open space located within the study area. This audit has been informed by a desktop analysis of geographical data and resources, including;

- City of Canada Bay Council Website
- Core List Australia (2016)
- NSW Department of Education and Communities My School website
- ArcGIS Online.

The audit is indicative and based on the data available at the time of preparing this report. The purpose of the social infrastructure audit is to understand strengths and weaknesses of existing social infrastructure and to determine what has potential to accommodate future population growth.

6.1 What is social infrastructure?

Social infrastructure is an asset that accommodates social services or facilities. Social infrastructure is an important aspect of society as it provides the community with tangible or perceived benefits linked to the safety, health and wellbeing of that community. It also links to the economic growth and the sustainability of the community, therefore playing a critical role in society.

Specifically, this report has been produced to address the needs of particular infrastructure types, which include education, community, cultural and recreational infrastructure.

For the purposes of clarity, this report excludes businesses such as retail or commercial services. While these facilities provide a valuable social function, the future provision of these businesses in any area is typically market-led and does not benefit from formal government funding.

6.2 A catchment approach

Social infrastructure facilities generally operate at three levels of provision. These are local, district and regional. The different scales of infrastructure service different sized catchments. Catchments refer to both geographical areas and the size of the population serviced. For example, a primary school is intended to serve the local population, usually within walking distance. However, a university will cater for a much wider population. Table 21 identifies the facilities included in the audit and the catchments that they serve.

Table 21: Social infrastructure parameters of provision

	Local (generally up to 20,000 people)	District (generally up to 50,000 people)
Childcare and educational facilities	Primary school Long day care Preschool Out of school hours care	Specialist school Secondary school Combined school
Community and cultural facilities	Branch library Meeting space Community centre	District library Multipurpose community centre/community hub
Active open space	Playground Outdoor sport court i.e. tennis and basketball Oval/sport field	Multi-purpose community/ neighbourhood sports facility Indoor sport facilities
Passive open space	Neighbourhood open space and parks	

Source: HillPDA

6.2.1 Childcare and educational facilities

There are 17 local level facilities in close proximity of the precinct. There are twelve childcare facilities, three of which border the Precinct. Ten centres have capacity while two do not and operate a waiting list for places. There are also three public primary schools, one of which borders the Precinct – all have capacity. Also present are two independent primary schools which both have capacity for new enrolments.

There are six district level facilities near the site. The four public facilities are two secondary schools and a specialist schools located in Rivendell child, adolescent and family hospital (a mental health facility) and the Concord hospital (a medical education centre). Also present are The McDonald College, an independent performing arts school and MLC School an independent girls school.

The locations of these facilities are shown in figure below and the details are provided in the table immediately below.

Figure 11: Childcare and education facilities

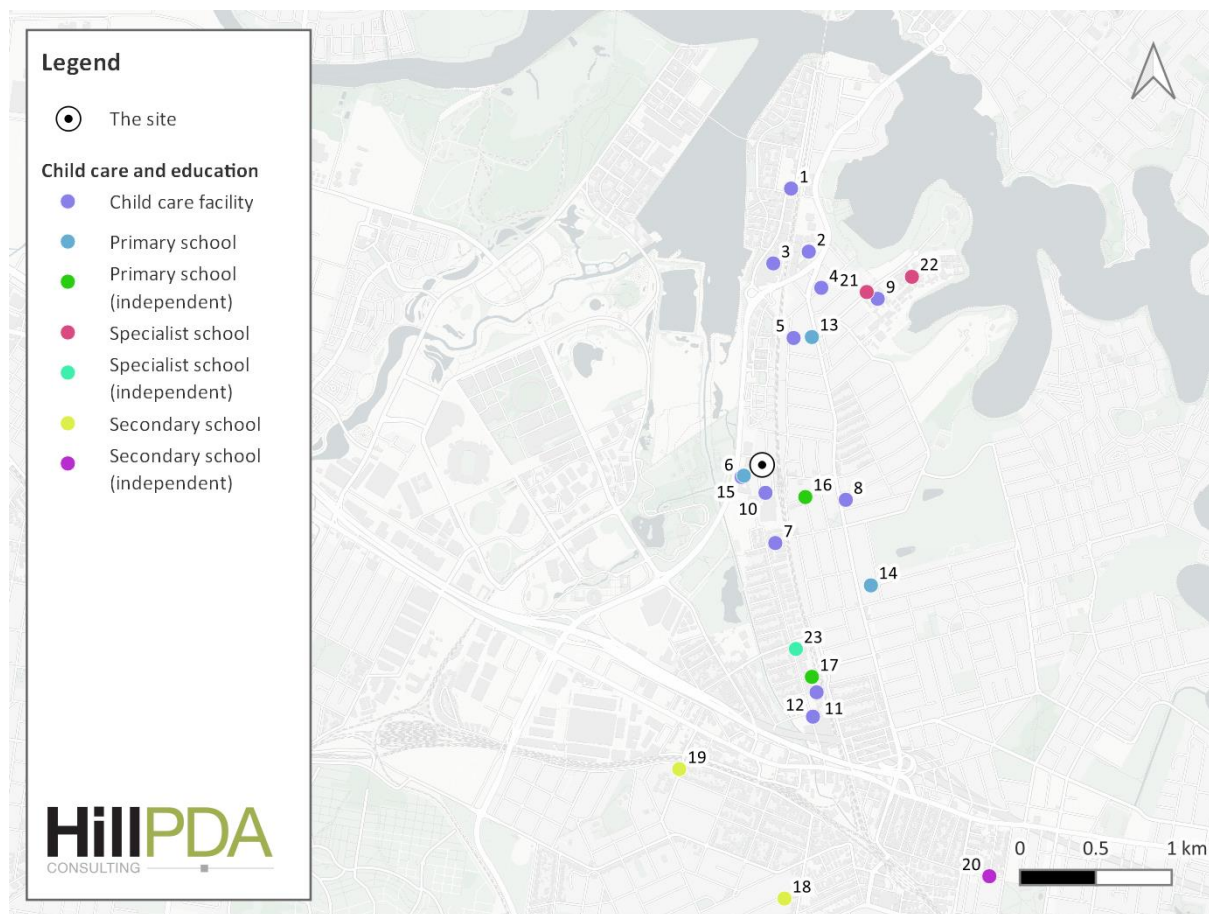


Table 22: Childcare and education facilities

Facility	Map ID	Name	Address	Capacity
Local				
Childcare	1	Rhodes Children's Centre	2 Mary St RHODES NSW 2138	No - Waitlist
	2	Only About Children Rhodes Corporate Park	1E Homebush Bay Drive RHODES NSW 2138	Yes
	3	Learn & Play Management Pty Ltd	Rhodes Shopping Centre, Level 7 1 Rider Boulevard RHODES NSW 2138	Yes
	4	Concord West Rhodes Preschool	Killoola Street CONCORD WEST NSW 2138	No - Waitlist
	5	Concord West Child Care Service	345 Queen Street CONCORD WEST NSW 2138	Yes
	6	Victoria Avenue Children's Centre	Victoria Avenue Public School, 64-66 Victoria Ave CONCORD WEST NSW 2138	Yes
	7	Papilio Early Learning North Strathfield (Orange Campus)	Shop GC07, Ground Floor, Block C, 27-29 George Street NORTH STRATHFIELD NSW 2137	Yes
	8	Greenwood Early Education Centre Concord	86 Nirranda St CONCORD WEST NSW 2138	Yes
	9	Yaralla Child Care Centre	Gate 4, Nullawarra Avenue CONCORD NSW 2139	Yes
	10	Only About Children Concord	31B George Street CONCORD WEST NSW 2138	Yes
	11	Lighthouse Childcare North Strathfield	2A Hamilton Street STRATHFIELD NORTH NSW 2137	Yes
	12	Papilio Early Learning North Strathfield (Blue Campus)	11 George Street NORTH STRATHFIELD NSW 2137	Yes
Primary	13	Concord West Public School	378 Concord Rd, Concord West NSW 2138	Yes
	14	Strathfield North Public School	251 Concord Rd, North Strathfield NSW 2137	Yes
	15	Victoria Avenue Public school	64 Victoria Ave, Concord West NSW 2138	Yes
Primary (Independent)	16	St Ambrose Catholic Primary School	Stuart St, Concord West NSW 2138	Yes
	17	Our Lady of the Assumption Catholic Primary School	1A Hamilton Street East, North Strathfield NSW 2137	Yes
District				
Secondary	18	Strathfield Girls High School	116 Albert Rd, Strathfield NSW 2135	Yes
	19	Homebush Boys High School	Bridge Rd, Homebush NSW 2140	Yes

Facility	Map ID	Name	Address	Capacity
Secondary (Independent)	20	MLC School	Rowley St, Burwood NSW 2134	Yes
Specialist	21	Rivendell school	Hospital Rd, Concord West NSW 2138	Yes
	22	Concord Medical Education Centre	1H Hospital Rd, Concord West NSW 2138	Yes
Specialist (Independent)	23	The McDonald College	17 George St, North Strathfield NSW 2137	Yes

Source: NSW Department of Education and Communities My School website, Service NSW Childcare Education and Care Providers, Google Maps

6.2.2 Community and cultural facilities

There are five local level facilities located near the subject precinct. There is one branch library and four community centres. The community centres feature a range of meeting spaces including meeting rooms and larger halls.

There are also two district level facilities. The Connection in Rhodes features event spaces as well as music studios and a digital classroom for hire. Concord Senior Citizens Centre contains a variety of spaces including an auditorium for performances and a commercial kitchen.

The locations of these facilities are shown in the figure below, with further details provided in the table following table below.

Figure 12: Community and cultural facilities

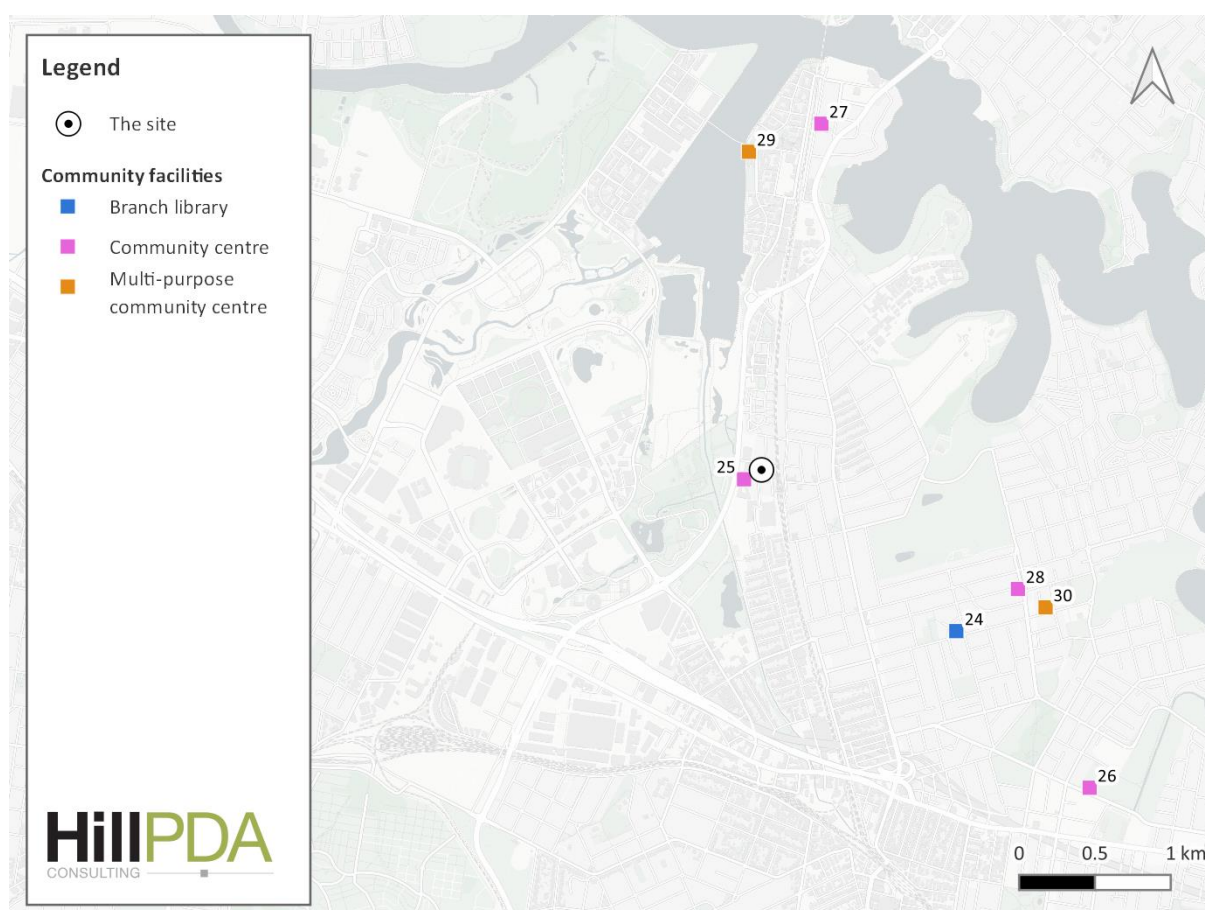


Table 23: Community and cultural facilities

Facility	Map ID	Name	Address	Details
Local				
Branch Library	24	Concord Library	60 Flavelle St, Concord NSW 2137	Library collection, study areas, computers and Wifi (Outside SA2)
Community Centre	25	Victoria Avenue Community Precinct – Community Hall	66 Victoria Avenue, Concord West NSW2138	Large hall/meeting space
	26	Concord Community Centre	1A Gipps Street, Concord NSW 2137	Podium, dance floor, parking, kitchen, table and chairs (Outside SA2)
	27	Rhodes Community Centre	63 Blaxland Road, Rhodes 2138	Large hall/meeting space (Outside SA2)
	28	Concord Memorial Hall	138 Majors Bay Rd, Concord NSW 2137	Large hall/meeting space (Outside SA2)
District				
Multi-purpose Community Centre/Hub	29	The Connection	30 Shoreline drive, Rhodes NSW 2138	Events and meeting spaces as well as two music studios and a digital classroom for hire (Outside SA2)
	30	Concord Senior Citizens Centre	9-11 Wellbank St, Concord NSW 2137	Meeting room, commercial kitchen and auditorium with piano and PA system

Source: Canada Bay Council Website, Google Maps

6.2.3 Open space

There are ten local level facilities located near the subject precinct including two Oval/sport fields space areas. These spaces provide facilities for organised cricket and football games and are also used for passive recreation by the local community. There are also seven playgrounds offering a range of children's play equipment and a swimming centre.

There are four district level facilities located in close proximity to the subject precinct. These are multi-purpose community and neighbourhood sports facility providing for a variety of activities played at a range of levels.

The locations and details of these facilities are shown in the figure and table below.

Figure 13: Active open space

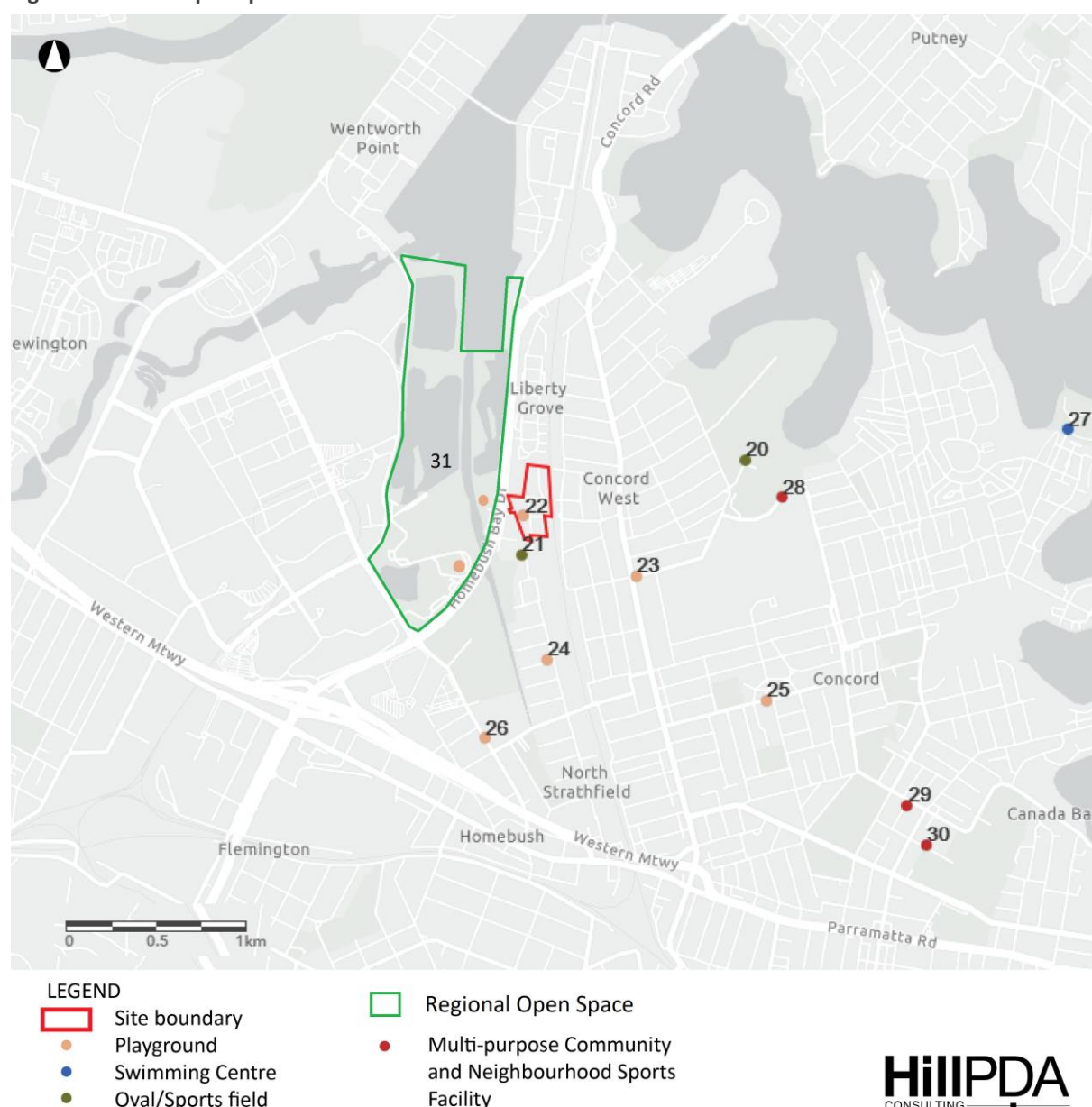


Table 24: Active open space

Facility	Map ID	Name	Address	Details
Local				
Oval/sports field	20	Arthur Walker Reserve	11B Nullawarra Avenue, Concord West NSW 2138	Synthetic cricket wicket and oval
	21	Powells Creek Reserve	Concord West NSW 2138	Two synthetic cricket wickets/football fields
Playground	22	The Grid Hopper Playground	Victoria Avenue, Concord West NSW 2138	Soft fall surfaces, shade sails, new log seating, playground and picnic facilities
	23	Warbrick Park	Yaralla St, Concord West NSW 2138	Play equipment and picnic tables
	24	WA McInnes Reserve	124P George St, North Strathfield NSW 2137	Children's play equipment
	25	Central Park Playground	Wellbank Street, Concord NSW 2137	Slides and swings
	26	Mason Park	Underwood Road, Homebush NSW 2140	Sunshade and children's play area
Swimming Centre	27	Cabarita Swimming Centre	Cabarita Park, Cabarita Road, Cabarita NSW 2137	50m outdoor salt water heated pool. Cafe and kiosk facilities. (outside SA2)
District				
Multi-purpose community and neighbourhood sports facility	28	Majors Bay Reserve synthetic field (including Ron Routley Oval)	Norman Street, Concord NSW 2137	Perimeter fencing, turf cricket oval is used for cricket, soccer and rugby.
	29	Rothwell Park	Concord NSW 2137	Oval is used for cricket and rugby.
	30	St Lukes Park	3 Stanley St, Concord NSW 2137	Perimeter fencing, athletics track, senior playing field and turf wicket, netball courts, hockey complex
Regional				
Bi-Centennial Park	31	Bi-Centennial Park	Sydney Olympic Park	100 hectares of nature trails, lakes, mangrove boardwalks, fitness course, café/kiosk, cycleways, pavilion, BBQs/picnic areas, education centre and 2 playgrounds

Source: Google Maps

INDUSTRY MARKET OVERVIEW

7.0 INDUSTRY MARKET OVERVIEW

The following chapter undertakes an assessment of the current supply and demand for industrial lands and therefore the likely need for retention of industrial lands within the Canada Bay LGA.

7.1 Industrial Sector Trends

The demand for industrial floorspace continues to be influenced by the globalisation of trade and the increasing dominance of information technology by businesses. The global supply chain has evolved into an alignment of firms that design, develop, market and produce goods and services and deliver to the end user as required. The face of traditional manufacturing is therefore changing, becoming more efficient amid the use of new technologies and equipment. These savings in efficiency have resulted in corresponding savings in labour costs and the demand for floorspace.

As a consequence, the rate of development of industrial land and floorspace across NSW has generally been outpaced by the rate of employment growth. This trend however varies considerably between types of activity.

Manufacturing employment growth has generally either declined or remained stagnant, with a few exceptions. These exceptions include food manufacturing and beverage & tobacco manufacturing. The combination of a rising population and growing disposable incomes has underpinned growth in domestic demand for these goods. The perishable nature of significant proportion of production, together with the relative isolation of Australia from competitor markets, has helped cushion these sectors from international forces. Australia is also a major food and beverage exporter and growing demand from emerging Asian markets has bolstered demand for Australian production.

With declines in non-food manufacturing and a growth in imports, warehousing, transport, distribution and logistics businesses have thrived. These types of businesses together with larger manufacturing services have shifted their preferred locations from the inner city to the Outer-West and South-West of Greater Sydney. These locational decisions have been supported by improvements to the outer orbital ring roads and motorways (M5 and M7) and the proposed development of intermodal facilities such as the Moorebank Intermodal.

These locations benefit from the availability of larger sites required for modern logistics businesses that are not generally available in the Inner West Subregion.

7.2 The Precinct assessment

The development of industrial related uses require a number of prerequisites/characteristics such as appropriate zoning, a large developable area, high connectivity, good topography and soil conditions and a conducive surrounding environment. Each of these prerequisites / characteristics will now be explored.

7.2.1 Land use conflict

The existing industrial building is surrounded by sensitive land uses (including residential uses). Noise and environmental impacts in addition to freight movements would restrict the type of industrial uses which could occupy the site.

7.2.2 Accessibility

Industrial developments usually require good access to highways with two entry points. Rail and freight lines are also desirable. The precinct contains only a couple of access points for vehicles and both of these are through residential areas.

The isolation of the site from other industrial and business zones will also limit any agglomeration benefits for prospective firms.

7.2.3 Environment

The precinct's location with poor access for industries and proximity to sensitive residential uses is a significant constraint on its suitability for many industrial uses. Yet the printing business is only 230m from the train station making it highly desirable for future transit orientated development.

7.3 Industrial Lands Demand

The 2020 Employment Lands Development Monitor (ELDM)³ identifies 29.7ha of employment lands in the Canada Bay LGA⁴, of which the printing business accounts for just 1.68%. This down from 30.3ha in 2018 reflecting the progressive shift away from industrial uses in the LGA.

Moreover, the Canada Bay LGA contains just 2.0% of the total zoned employment lands in the Eastern City District. While Strathfield LGA was identified as having 287ha of employment lands, the other Inner West LGAs (Canada Bay, Burwood and Inner West) totalled 305.3ha.

Colliers noted in their Industrial Research and Forecast Report, Second Half 2015, that “speculative purchases continued to occur in the inner west submarket and that properties in proximity to train stations, bounding the Parramatta River, or in areas with potential rezoning were in high demand”⁵. These sites were being purchased with a view to their future rezoning in accordance with government policy to promote greater housing density in locations with high amenity and good transport links. Since then inner west has been characterised by significant urban renewal and a long term trend of deindustrialisation. Although the displacement of tenants from inner west is in part due to land use changes to mixed use and residential, it is largely a function of the higher costs and strong competition (ie from Western Sydney which provides large sites and is a more affordable alternatives).

7.4 Conclusion

With the exception of activity around Port Botany, the Eastern City District industrial market is characterised by modest levels of demand and new lease activity. This has been a result of subdued investment resulting in a lack in new developments.

Outside of the Port, investment activity has been centred on non-traditional uses. Low employment generating industrial uses are increasingly unnecessary in close proximity to major centres as a result of a long term structural shift in economic activity.

Low demand for traditional industrial uses has resulted in the development of alternative uses within the industrial areas such as hardware retailing, showrooms and self-storage facilities rather than manufacturing.

³ Department of Planning and Environment: Employment Lands Development Monitor 2018

⁴ Employment lands was defined as land zoned for industrial purposes and included IN1, IN2, IN3, B5, B6 and B7 land use zones

⁵ Colliers International: Industrial Research and Forecasts Report, Second Half 2015, pg. 16

RESIDENTIAL JUSTIFICATION

8.0 RESIDENTIAL JUSTIFICATION

This Chapter undertakes an assessment of the demographic profile for the Concord West suburb residential market and analyses trends and factors influencing the property market within Concord.

8.1 Local Market Overview

The suburb of Concord West is located in the LGA of Canada Bay. Concord West is an inner west suburb of Sydney, located 15km west of the Sydney CBD.

The 2016 Census recorded a resident population of 5,914 in the suburb of Concord West. The suburb is characterised by low density housing – separate houses accounted for 82%⁶ of total dwellings in 2016, semi-detached, terrace houses and townhouse accounted for 8% and apartments comprised just 10%. There were no apartments above 3 storeys. This low density of residential is surprisingly low given the proximity to the city and train services. That said there is a much higher proportion of apartments (67%) in the wider SA2 area (suburbs of North Strathfield, Concord West, Liberty Grove and Rhodes combined).

The Canada Bay LGA itself has a high share of apartments, comprising 52% of all occupied dwellings in 2016. The Canada Bay LGA was formed in December 2000 following the merger of Drummoyne and Concord councils. The proportion of apartments to total dwellings in the two former councils in 2001 was 31%. Concord LGA was only 21%. In the intervening period dwelling growth has been predominantly centred in the north west of the Canada Bay LGA in Rhodes, Liberty Grove, Mortlake and Breakfast Point (taking advantage of their foreshore locations), and in the south west, near Strathfield and North Strathfield railway stations.

8.2 Population Projections

Population projections sourced from the Transport for NSW (TfNSW) are shown in the table below for the Concord suburb and for the Canada Bay LGA.

Table 25: Population Projections 2016 to 2031

	2016	2021	2026	2031	2036	Growth 2016-36	
Concord West	6,245*	6,792	7,733	8,707	9,334	3,089	49%
Concord West SA2	25,973	27,998	32,435	38,644	43,310	17,337	67%
Canada Bay LGA	91,639	97,231	104,070	113,940	123,243	31,604	34%

Source: NSW Transport Performance and Analytics (2018) and NSW Department of Planning * It should be noted that the TfNSW population estimates slightly exceed the ABS Census figures. The latter is considered to be an undercount of the actual resident population.

Over the 2016 to 2036 period, NSW Government forecasts almost 50% increase in the population for Concord West suburb and a 34% increase in Canada Bay LGA. The forecast for the Concord West SA2 is particularly significant. Most of this growth is in the suburbs of Rhodes and North Strathfield.

8.3 Private Occupied Dwellings

Over the period of 2006 to 2016, the number of private occupied dwellings in the Canada Bay LGA increased by 7,958 dwellings (from 26,147 in 2006 to 34,105 in 2016). A comparison of the number of private occupied

⁶ Excludes Unoccupied Dwellings

dwellings against population growth demonstrates that supply has not kept up with demand over this period. The average household size has crept up from 2.51 to 2.58.

In 2016 the average household size was 2.50. If we apply this rate today it suggests a need for 35,206 occupied dwellings – some 1,100 more than actual.

8.4 Affordable Housing

8.4.1 Rental Market

A shortage in the supply of houses has resulted in the escalation of house prices in Concord West. In the Concord West SA2 the median weekly rent increased from \$320 to \$590 over a 10 year period from 2006. This calculates to an average annual compound growth rate of 6.3%. The median weekly rent for the Canada Bay LGA over the same period grew at an annual compound rate of 7.5%, from \$335 to \$565.

Rental affordability deteriorated in the LGA between 2006 and 2016, with the rental share of income increasing from 23% in 2006 27% in 2016 as shown in the table immediately below.

Table 26: Rental Affordability Canada Bay LGA (2006-2016)

	2006	2016
Annual Median Rent	17,420	29,380
Annual Median Household Income	75,556	107,106
Rent % of Income	23%	27%

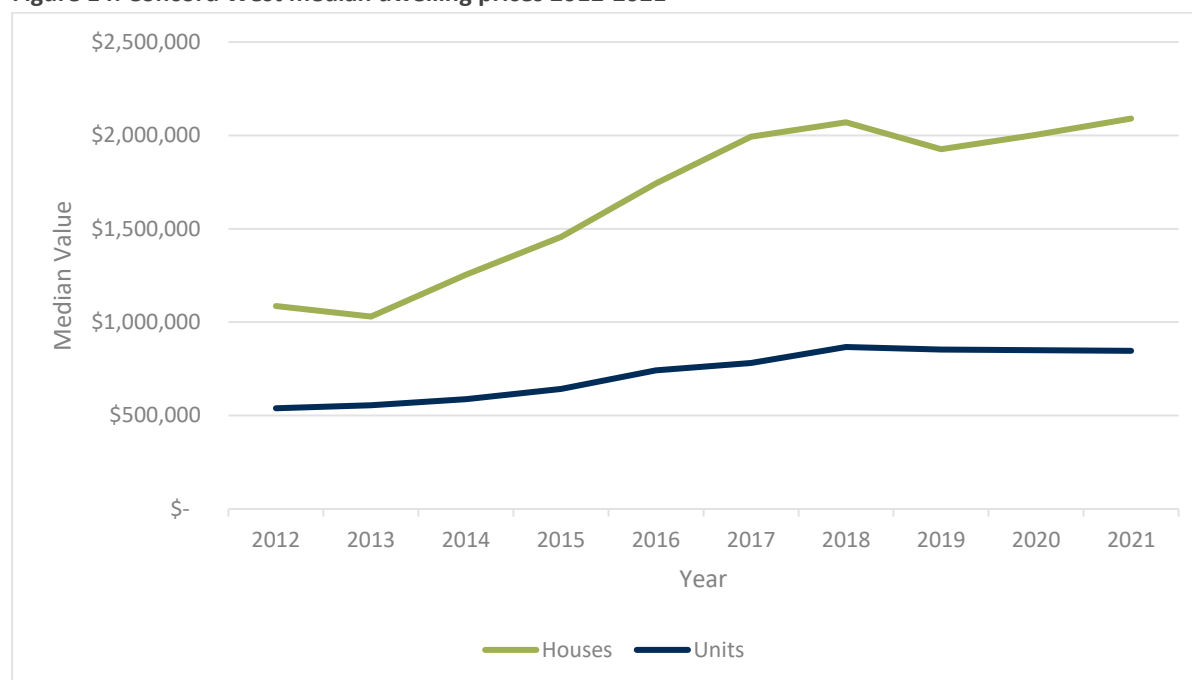
Source: Census 2006-16 Time Series

With moderate population growth anticipated in Concord West over the next decade, it will be essential to provide new residential stock to maintain affordability. As such the Planning Proposal will facilitate in alleviating some of the ongoing rental pressure.

8.4.2 Housing Market

Data relating to unit prices in Concord West has been derived from Residex and is provided in the table below. This indicates that the median price of a house and a unit increased sharply between 2013 and 2021. The fall in housing and unit price from 2012 and 2013 was the tail end of the GFC and reflective of the economic conditions at the time.

Figure 14: Concord West median dwelling prices 2012-2021



Source: Residex

Between 2013 and 2021 the median price of houses more than doubled (103% increase) compared to an increase of just 52% for strata title dwellings. The extent of the price rise for dwellings in Concord West is indicative of high demand for dwellings in this location and evidence of the increasing unaffordability of these dwelling types, particularly with respect to houses. Increasing the supply of apartments is imperative to alleviating the problem of affordability.

Despite the relatively high median annual household income of \$107,7447, it is evident that home ownership is challenging in the suburb of Concord West.

The Planning Proposal could potentially deliver 67 affordable housing dwellings – a mix of 1, 2 and 3 bedroom units.

8.5 Improving Housing Choice

One of the overarching priorities of the Eastern District Plan is to improve housing choice, diversity and affordability.

Table 27: Age and household type profile, Canada Bay LGA (2011-2031)

	2016	2036	2016-36
Age cohort			
0-14	16%	15%	-1%
15-24	12%	12%	0%
25-34	20%	19%	-1%
35-49	21%	21%	-1%

⁷ Census 2016 median household income for Concord West

50-64	16%	16%	0%
65+	14%	18%	3%
Household type			
Couple families with dependents	32%	30%	-2%
Couples without dependents	30%	31%	1%
Group households	6%	6%	0%
Lone person households	22%	23%	1%
One parent family	8%	8%	0%
Other families	3%	3%	0%

Source: Canada Bay LGA Forecast.ID Viewed on March 2021

As demonstrated in the table above, the Canada Bay LGA is anticipated to experience an ageing population, with a greater proportion of retirees over the next two decades. Similarly, the proportion of couples without dependent children and lone person households is also expected to increase over this period.

8.6 Drivers of Demand

The development of land for residential use is driving more widespread renewal than for any other land use at present, representing the 'highest and best use' from a development standpoint. Sales of development sites reflect this sentiment, with sites offering residential development opportunities observed to be principally driving sales activity in the development market.

The key drivers of NSW's residential property market have been:

- Low interest rates driving increases in house prices
- Demand for more affordable housing product types – leading to an increased proportion of apartment developments
- High cost of ownership leading to a higher propensity for households to rent
- Downsizing of empty nesters
- Increased demand for new housing around major transport nodes, especially at railway stations, owing to lifestyle change
- Demographic trends leading to declining household sizes

Strong population growth and demand for residential sites with good transport links and amenities will continue to underpin high demand for new apartments in Sydney's inner west.

8.7 Housing Market Change

From 2001 the Canada Bay LGA housing market experienced a sizeable increase in the supply of new dwellings. The total number increased by 48% from 21,596 dwellings in 2001 to 32,102 dwellings by 2016⁸. From 2006 to 2016 the number of occupied dwellings in the LGA increased by 7,689 and 97% of the increase were in

⁸ ABS 2016 Canada Bay LGA Time Series Profile

apartments. The table below shows the total number of dwellings and net increase by dwelling type and number of bedrooms from 2001 to 2011.

The majority of opportunities for residential growth within Concord suburb are through redevelopment of lower density residential lots and redundant or underutilised sites, such as the Precinct.

The provision of higher density dwellings, especially apartments, aligns with broader lifestyle trends towards living close to amenities, transport nodes and employment. This is reflected in the Canada Bay LGA which has experienced a significant shift in its housing composition towards medium and high density dwellings.

Table 28: Change in Occupied Private Dwellings, Canada Bay LGA 2006-2016

	2006	2011	2016	2006-26	2006-16 (%)
Separate house:					
None (includes bedsitters)	3	4	8	5	167%
One bedroom	33	35	23	-10	-30%
Two bedrooms	1,458	1,237	937	-521	-36%
Three bedrooms	5,160	4,954	4,562	-598	-12%
Four or more bedrooms	3,518	4,148	4,660	1,142	32%
Number of bedrooms not stated	123	92	108	-15	-12%
Total	10,297	10,469	10,295	-2	0%
Semi-detached, row or terrace house:					
None (includes bedsitters)	0	3	0	0	
One bedroom	15	20	26	11	73%
Two bedrooms	634	811	646	12	2%
Three bedrooms	1,033	1,327	1,226	193	19%
Four or more bedrooms	195	253	298	103	53%
Number of bedrooms not stated	14	18	28	14	100%
Total	1,890	2,429	2,221	331	18%
Flat, Unit or Apartment:					
None (includes bedsitters)	7	16	19	12	171%
One bedroom	200	434	1,098	898	449%
Two bedrooms	2,944	4,187	6,093	3,149	107%
Three bedrooms	1,760	2,258	2,712	952	54%
Four or more bedrooms	59	112	148	89	151%
Number of bedrooms not stated	58	51	112	54	93%
Total	5,023	7,059	10,182	5,159	103%
TOTAL	17,210	19,957	22,698	5,488	32%

Source: ABS – Time Series Profile for Canada Bay LGA (2006 - 2016)

8.8 Policy Perspective

The Eastern District Plan has set a housing target in Canada Bay of 2,150 new dwellings between 2016 and 2021. The City of Canada Bay Local Planning Strategy aims to achieve that target through quality urban design outcomes designed and located to meet the requirements of the existing and future population, including the ageing population and affordability. Additionally, the Strategy targets protection of heritage items, conservation areas and the natural environment, including prominent view corridors covering parks, bushland and foreshore areas. The Strategy also looks to ensure that planning for land use and transport occurs in an integrated manner to reduce private car use.

The Planning Proposal would address these issues in the following manner:

- Support the changing social needs of the community through the provision of a range of unit typologies and price points, including affordable housing
- Provide easy access to a range of retail and existing community uses, thereby supporting both an ageing population and young families with children and reducing vehicle trips.
- Provide easy access to open spaces particularly Bi-Centennial Park.

8.9 Summary & Implications

Anticipated population growth and latent demand for new residential dwellings in the Canada Bay LGA has been driving a transformation of industrial and business areas with a notable increase in the level of mixed use developments incorporating residential uses over time. This trend is projected to continue, with demand in the Canada Bay LGA expected to remain strong through the next decade.

As there are limited opportunities to develop new housing in sites with high amenity and good transport links, increasingly old industrial buildings and cottage sites are being redeveloped to maximise their potential to contribute to a range of government objectives.

From a policy perspective, the Planning Proposal would help to meet the shortfall of new dwellings in a highly sought after location within the inner west of Sydney.

In addition to contributing to the supply of housing, other benefits from the planning proposal include:

- Complementing the character of the immediate region, which is predominately residential
- Increasing the proportion of residents living close to employment, retail facilities, amenities and public transport (which aligns with the NSW State Plan 2021)
- Supporting the viability of the main retail and commercial precincts
- The Precinct is also distinctly positioned close to education and recreation facilities, particularly Bi-Centennial Park. This is an advantage to residential developments with residents seeking to escape from the urban environment and attracted by proximity to schools for their children
- Providing development contributions which could be used to improve public space and infrastructure in the locality.

DEMAND FOR RETAIL SERVICES

9.0 DEMAND FOR RETAIL SERVICES

It is envisaged that the retail spaces proposed in the Precinct will be convenience retail serving the local walkable catchment to the west of Concord West station. The majority of trade is likely to be from foot traffic including train commuters rather than car based shopping.

We have defined the potential trade area as a walkable catchment of around 800m to the west the train station bounded by Settlers Boulevarde in Liberty Grove to the north, Mena Street in North Strathfield to the south, Concord rail line to the East and Homebush Bay Drive to the west.

This area has a current population of around 2,100 persons, which could support a neighbourhood centre similar to the current offer immediately on the east side of the station. Significant population growth is expected in the area, with a number of planning proposals and developments applications in progress or have been approved (refer to figure below for further detail on developments within the area). Assuming this planning proposal, along with 60% of the dwellings proposed from the surrounding planning proposal and development applications where to proceed over the next 15 years, the population is projected to triple to around 6,300 by 2036.

Figure 15: Other planning proposals and DAs



Source: Dickson Rothschild

A population of some 6,300 is sufficient to support a small to medium sized supermarket, with a store of around 1,000sqm typical size for a number of new format Woolworths and Coles stores including ones in mixed use developments. Examples include the 950sqm Woolworths store on Erskineville Road, Newtown, the new Woolworths store on Charles Street Canterbury and the Coles supermarket in St Leonards. These stores have small trolleys and baskets and a low number of parking spaces available for customers. A Supa-IGA is another possibility. A large proportion of trade is likely to be foot traffic. Similarly we can expect a large proportion of trade at Concord will be residents walking to the store and/or commuting from the train station. Some train commuters may park in the area.

6,300 residents in the trade area are expected to spend around \$111.2m in retail goods and services of which almost \$34.2m (31%) would go to supermarkets and grocery stores. Assuming 25% capture of this expenditure the supermarket could achieve potential sales of \$8.5m from trade area residents.

Some sales are expected to be derived from other sources including residents that live immediately on the east side of the station and workers within walking distance – currently around 2,000. The school, Bi-Centennial Park and recreational bike riding would also attract potential shoppers. An additional 20% of total sales over and above the levels captured by local residents is easily conceivable. This would increase total retail sales of the supermarket to \$10m to \$12m. With this sort of turnover a supermarket of around 1,000sqm would trade at industry benchmark levels.

Around 28% of total retail spend is captured by department stores, apparel and bulky goods leaving about 41% for other store types including specialty foods, food services including restaurants, specialty non-food and personal services. For a semi-metro style centre anchored by a small size supermarket we would expect a potential capture of 25% of trade area expenditure in the other categories. With a target turnover density of around \$6,500/sqm demand would be for 1,700-1,800sqm specialty retail plus say 20% for non-retail commercial services (eg health, massage, financial, real estate and travel services and community uses). Total demand for shop front specialties would reach 2,900-3,200sqm upon completion of the Precinct and surrounds. The proposed provision of retail as part of the planning proposal, at 2,797sqm, therefore is aligned with future retail demand (it also allows for approximately 500sqm of shopfront floorspace for existing and future developments in the catchment).

SOCIO-ECONOMIC IMPACTS

10.0 SOCIAL AND ECONOMIC IMPACTS

The following Chapter assesses and, where possible, quantifies the likely social and economic impacts of retaining the Precinct's current use and zoning in comparison to redevelopment of the Precinct under the Planning Proposal.

An extensive issue scoping was undertaken. The impacts evaluated are outlined in the table below.

Table 29: Categories of impacts

Section	Impacts	Description	Impact Characteristic	Social risk rating	Mitigation
10.1	Employment	Substantial increase to the number of jobs available locally, additional workers from the wider region will contribute positively to existing businesses	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.2	Local and Regional Economy	Planning proposal generates additional economic activity during and post construction	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.3	Government revenue	State and local government stand to receive additional revenue from development (~\$238.5m)	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.4	Housing	Planning Proposal would result in a net increase of approximately 1,375 dwellings, making a true contribution to local and regional housing supply	Positive, long term, affects Precinct and surrounds	N/A (positive)	N/A (positive)
10.5	Local amenity	The Planning Proposal seeks additional density beyond the existing controls of the LEP, however it intends to provide the delivery of this density with improved amenity. The provision of public open space and ground floor retail opportunities are likely to create a vibrant precinct that encourages visitation as well reflecting and nourishing the existing identity of Concord West.	Positive, long term, and localised	N/A (positive)	N/A (positive)
		The construction process has the potential to affect the amenity of sensitive receivers within the surrounding area.	Long term, localised, medium severity, medium sensitivity	B3	A range of mechanisms can be applied to minimise any potential construction impacts on amenity. Such mechanisms are employed by most building contractors and implemented through a Construction Management Plan
10.6	Community cohesion	Planning proposal would contribute to a socially cohesive community through contributing commercial floorspace and providing substantial revenue to state and local government which can be used towards improving community facilities.	Positive, long term, and localised	N/A (positive)	N/A (positive)

Section	Impacts	Description	Impact Characteristic	Social risk rating	Mitigation
		Planning Proposals for new communities may have the potential to be isolated and perceived as 'gated' communities. Gated communities can appear exclusive and 'unwelcoming' to surrounding communities and can create community severance and result in social segregation.	Long term, localised, medium severity, medium sensitivity	B3	The provision of commercial floorspace as part of the planning proposal would increase the opportunities for residents within the Precinct, Concord West and the surrounding suburbs to interact and reduce any perceived barrier effect.
		The subject precinct sits between the train station and a major entry point into Bicentennial Park. It will therefore become a place for visitors passing through or staying a short time for dining, food services or like activities which will help negate any possible perception of community severance.	Positive, long term, and localised	N/A (positive)	N/A (positive)
10.7	Health and wellbeing	Health and wellbeing	Positive, long term, and localised		N/A
10.8	Social Infrastructure	The existing school and childcare facilities should be able to accommodate the additional residents generated from the planning proposal. However the Planning Proposal will create pressure on existing community facilities which are already somewhat over capacity.	Long term, medium severity and low sensitivity	B3	Council will need to accommodate for additional community facilities to meet demand. It should be noted, however, that there are several community facilities immediately outside of the SA2 which could accommodate the additional demand.
10.9	Access and connectivity	The Planning Proposal will serve the objectives of the Greater Sydney Region Plan, Eastern City District Plan and YOUR future 2030 by facilitating an improved urban design outcome with substantial residential density close to public transport options (TOD development). This will promote the use of public transport and reduce reliance on private motor vehicles.	Positive, long term, and localised	N/A (Positive)	N/A (Positive)
		High density residential developments often result in concerns among the local community regarding parking requirements and additional traffic congestion due to population growth within the locality. Given the low car ownership rates in the locality, the low occupancy rates typical of high-density development and the good accessibility to public transport, the development is not likely to adversely affect local traffic and parking demand.	Long term, low severity and low sensitivity	C1	N/A (Low risk)

Source: HillPDA Research

10.1 Employment

10.1.1 Current employment

The current land uses of the Precinct provide employment through: 1) the two businesses which are assumed to be operational 2) residents that work at home. An ABS survey (Cat 6275.0) found that across Australia 7.6% of paid workers undertake the majority of their paid work at home. As demonstrated in Table 29, it is estimated the Precinct currently employs approximately 53 people.

If the current land use continued the combined total of 53 workers' remunerations under the current zoning would be approximately \$3.4 million assuming an annual average wage of \$64,858⁹.

Table 30: Current employment within the Precinct

Land Use	Employment Density*	GLA (sqm)****	Units	Jobs
Graphic Overprint (printing service)**	1 / 80 sqm	2,931	sqm	31
Glass and Aluminium business	1 / 65 sqm	808	sqm	12
Work at Home***	1 / 9 units	90	units	10
Total				53

Source: * Various including City of Sydney Floor Space Survey 2017

** Desktop review indicates that Graphic Overprint operates on site. HillPDA was unable to make contact with the business to confirm employment numbers and for this reason used an industry average employment densities for light industrial at 1 worker per 80sqm.

***Home Based Businesses (ABS Locations of Work 2008 Cat 6275.0 and ABS Census 2016 Community Profile) and assuming 1.3 working residents per household which calculates to around 1 job per 10 dwellings.

**** Assumes GLA equals 85% of GFA (GFA estimates derived from aerials sourced from sixmaps)

Approval of the Planning Proposal would result in rezoning of IN1 General Industrial, R2 Low Density Residential and R3 Medium Density Residential under the Canada Bay Local Environmental Plan (LEP) 2013, to a zoning that would allow higher density residential development and shop front commercial space. This is likely to impact employment opportunities on the site.

The following assesses the economic impacts relating to construction and operation/inhabitation of the new buildings and public spaces in the Precinct under the Planning Proposal.

10.1.2 Planning proposal post construction employment

The Planning Proposal would support permanent employment post-construction through the operation of retail and community uses within the development.

The table below provides an estimate of the number of jobs that would be supported in the Precinct in accordance with the Planning Proposal.

⁹ Sources: IBIS World Reports 2020, ABS Census and HillPDA

Table 31: Planning proposal employment generation

Land Use	Employment Density	GLA (sqm)/ No. Units	No. of Workers
Shop front space	1 worker per 25sqm*	2,461sqm (GLA)	98
Work at home	1 per 12.5 dwellings**	1,406 dwellings	113
Total			211

Source: IBIS World Reports

* Various sources including City of Sydney Floor Space Survey 2017 and ABS Retail Survey 1998-99. Assumes 88% of GFA is leasable space

** Work at home: 7.6% of workers undertake majority of work at home (ABS Locations of Work 2008 Cat 6275.0) and we have assumed 1.1 workers per occupied dwelling in the Precinct (1.3 average across the LGA) which calculates to approximately 1 job for every 12.5 dwellings. Assumes 4% of apartments remain vacant.

Based on the table immediately above, the Planning Proposal is forecast to provide 211 jobs post full development. These are jobs in full, part-time and casual positions. On this basis the Planning Proposal would provide 158 more jobs than the current uses in the Precinct.

Total workers' remunerations under the Planning Proposal is predicted to be \$11.6m (measured in 2020 dollars), which is \$8.1m more in salaries than the current uses on site. This is shown in the table immediately below.

Table 32: Potential salary contribution

Land Use	No. of Workers	Average Annual Wage	Total Wages (\$m)
Retail	98	\$34,296	\$3.4
Work at Home	113	\$72,800	\$8.2
TOTAL	211	\$54,831	\$11.6

Source: ABS Average Weekly Earnings (Cat 6302), IBIS World Reports and HillPDA Research.

10.1.3 Employment generated from construction

The employment generated from design and construction is carried out using national input-output tables and LGA location quotients, to develop LGA specific multipliers. These multipliers illustrate the level of additional economic activity generated by a source industry, at the local government area level.

HillPDA estimates the total capital investment value (design and construction) of the proposed development to be around **\$700m** as shown in the table immediately below.

Table 33: Estimated design and construction cost

Description	Units	\$/unit**	\$m
Enclosed building area*	152,050	\$3,300	\$502
Fitout costs	2,424	\$1,000	\$2
Basement car parking (spaces)	1,600	\$55,000	\$88
Demolition, site costs, contingencies, misc.	10%		\$56
Design and other professional fees	8.5%		\$52
TOTAL			\$700

* Fully enclosed building area – assumed to be 10% higher than GFA

** Various sources including Rawlinsons Construction Handbook 2020, RLB Digest 2020 and various quantity survey reports of proposed buildings with similar scale and market standards

The construction industry is a significant component of the economy accounting for 6.8% of Gross Domestic Product (GDP) and employing just over one million workers across Australia¹⁰. The industry has strong linkages with other sectors, so its impacts on the economy go further than the direct contribution of construction. Multipliers refer to the level of additional economic activity generated by a source industry.

The economic impact assessment is carried out using national input-output tables and LGA location quotients, to develop specific multipliers at the LGA. These multipliers illustrate the level of additional economic activity generated by a source industry, at the local government area level.

There are two types of multipliers:

- Production induced: which is made up of first round effects (all outputs and employment required to produce the inputs for construction) and industrial support effects (induced extra output and employment from all industries to support the production of the first round effect) and
- Consumption induced: which relates to the demand for additional goods and services due to increased spending by the wage and salary earners across all industries arising from employment.

HillPDA calculates that every million dollars of design and construction directly generates 2.37 full time positions over 12 months¹¹. Based on the estimated construction cost of \$700m, approximately 496 job years¹² would be directly generated.

Through production and consumption induced (multiplier) impacts additional job years would be generated. At a national level around 7,021 job years would be generated, both directly and indirectly, as a result of the planning and development of the site under the planning proposal. However these job years are spread across the country. At the LGA level HillPDA estimates total job years generated, both directly and indirectly, to be 2,634 as shown in the table immediately below.

Table 34: Estimated LGA job multipliers

	Direct Effects	Production Induced Effects	Consumption Induced Effects	Total
Employment No. per \$million	2.371	0.566	0.828	3.765
Total job years created	1,659	396	579	2,634

Source: The ABS notes that ABS Australian National Accounts: Input-Output Tables 2017-18 (ABS Pub: 5209.0), Economy.ID

“Care is needed in interpreting multiplier effects; their theoretical basis produces estimates which somewhat overstate the actual impacts in terms of output and employment.” In particular it may leave the impression that resources used for production would not have been utilised elsewhere in the economy. Nevertheless, the estimates illustrate the high flow-on effects of construction activity.

10.2 Local and Regional Economy

10.2.1 Gross Value Added

Gross value added of an industry refers to the value of outputs less the costs of inputs. It also measures the contribution that the industry makes to the country’s wealth or gross domestic product (GDP). The GVA from the

¹⁰ IBIS World 2020 and ABS Input Output tables 2018

¹¹ Source: Hill PDA and ABS Australian National Accounts: Input-Output Tables 2017-18 (ABS Pub: 5209.0)

¹² Note: One job year equals one full-time job for one full year

existing uses within the Precinct is estimated to be \$5.0m every year based on \$93,638 per worker in 2019-2020.¹³

We estimate the value add from the Planning Proposal to be in the order of \$15.1m every year as shown in the below table.

Table 35: Gross value added from the various land uses on site

Land Use	No. Of Workers	IVA/ Worker	Gross Value Added (\$m)
Shopfront space	98	\$49,683	\$4.9
Work at Home	113	\$91,000	\$10.2
TOTAL	211	\$71,718	\$15.1

Source: * IBISWorld Industry Reports and HillPDA Estimate

Therefore the Planning Proposal would provide a higher level of gross value added or contribution to the economy than the existing uses in the order of \$10.2m more every year.

10.2.2 Expenditure from Residents

The Planning Proposal would provide 1,465 new residential dwellings in the Precinct. Assuming 96% of the apartments are occupied and an average occupancy rate of 2.5 persons per apartment¹⁴ we estimate 3,516 residents in the Precinct.

These residents would generate demand for local retail and commercial goods and services. By 2031 these residents are expected to spend around \$17,000 each in retail goods and services (\$2019)¹⁵. This calculates to around \$59.8m every year on retail goods and services.

The retail centre will include speciality shops and restaurants as well as convenience shopping. HillPDA's retail assessment demonstrates that the majority of expenditure generated by onsite residents would be captured by the larger centres such as Concord (Majors Bay Road), Burwood, Rhodes and other existing centres. The Precinct's retail offering will however attract some of the convenience shopping demand previously captured by these neighbouring centres for residents within a walkable catchment. It will provide some attraction as a 'retail/restaurant destination', reflecting its offering with an entry point to Bi-Centennial Park.

10.2.3 Additional economic activity generated from construction

Based on the construction cost of \$700m and multipliers effects, including production and consumption induced effects (refer to Section 10.1.3) the development of the Planning Proposal will generate additional economic activity in the Canada bay LGA from the design and construction of the proposed development.

¹³ Sources: IBIS World Reports for Printing and Services and Printing Support Services, and Fibreglass Production Manufacturing, and ABS Average Weekly Earnings (Cat 6302) for work at home

¹⁴ Calculated from known occupancy rates by dwelling type by bedroom number in Canada Bay LGA (ABS Census 2016) and Council's Section 7.11 Development Contributions Plan

¹⁵ Average expenditure in Concord West suburb. Source: HillPDA estimate based on ABS Retail Trade 2019 (cat 8501.0) and Household Expenditure Survey 2016-17.

Table 36: Estimated economic multipliers

	Direct Effects	Production Induced Effects	Consumption Induced Effects	Total
Output multipliers	1	0.275	0.375	1.650
Output (\$million)	700	192	262	1,154

Source: ABS Australian National Accounts: Input-Output Tables 2017-18 (ABS Pub: 5209.0), Economy.ID.

\$700m on design and construction would generate a further \$192m of activity in production induced effects and \$262m in consumption induced effects. Total economic activity generated by construction would be \$1.15bn.

10.2.4 Investment stimulus

Where a significant property investment decision has been made it is generally viewed as a strong positive commitment for the local area. Such an investment can in turn stimulate and attract further investment. The direct investment in the Precinct would support a wide range of economic multipliers as outlined above which would in turn support investment in associated industries. It would also raise the profile of Concord to potential investors.

The proposed development would create additional business opportunities in this locality associated with future residents and the commercial and retail uses on site. It would increase the profile of this area and in so doing increase the financial feasibility of mixed use development, potentially acting as a catalyst on surrounding sites.

10.3 Government revenue

10.3.1 Financial benefit to whole of government

State and local government stand to receive additional revenue from development which is estimated at \$216m. The details are shown in the table immediately below:

Table 37: Estimated Financial Benefit to Government

Source of Revenue	TOTAL (\$m)
GST from Residential Apartments *1	100.0
Stamp Duty Revenue *2	54.8
Affordable Housing dedication *3	51.0
Developer Contributions *4	7.0
Payroll Tax during Construction *5	3.2
TOTAL	216.0

*1 Assuming average apartment sale price of \$925,000 and consideration method applied

*2 Assuming average apartment sale price of \$925,000

*3 Assuming 58 apartments with an end sale value of \$875,000 each

*4 Assuming 1% of total design and construction

*5 Assuming 50% of workers do not attract payroll tax due to varying business sizes

10.4 Housing

10.4.1 Housing supply and affordability

The ABS forecasts that the Sydney Metropolitan Area will gain an additional 1.5 to 1.9 million residents by 2036. In light of this change, the NSW State Government forecasts that Sydney will require an additional 664,000 dwellings over the next twenty years.¹⁶ Increased housing supply is also identified as a key priority in the *Eastern City District Plan*. The *Eastern City District Plan* has set a housing target in Canada Bay of 2,150 new dwellings between 2016 and 2021.

Providing ongoing housing supply to meet the Greater's Sydney's growing population, and housing which is more diverse and affordable are key themes in regional and district plans. Both plans stress the importance of providing housing in the right location, noting and the benefits of locating higher density residential uses within walking distance of centres with rail station.

As there are limited opportunities to develop new housing in sites with high amenity and good transport links, increasingly old industrial buildings and cottage sites are being redeveloped to maximise their potential to contribute to a range of government objectives.

The Planning Proposal would result in a net increase of approximately 1,465 dwellings, making a significant contribution to local and regional housing supply and accommodating those that are directly affected by housing affordability, through providing 4% of affordable dwellings (~59 apartments).

The Planning Proposal will also contribute to housing supply by introducing several providers in the Concord West housing market. Multiple producers will ensure the market is not monopolised, encouraging greater competition and a healthy production rate. Moreover, the Planning Proposal is potentially a significant new source of dwelling supply that would be expected to have some positive influence on housing affordability in the Canada Bay LGA, with apartments providing a significantly more affordable alternative to detached dwellings and the like.

The Planning Proposal would have an overall positive impact upon housing supply and affordability.

10.4.2 Density in sustainable locations

The *Future Transport 2056* strategy has the aim of better integrating land use and transport. The *Greater Sydney Region Plan* has been prepared to integrate with the *Future Transport 2056*. The *Greater Sydney Region Plan* recognises the importance of meeting the growing demand for housing in suitable locations to minimise the impacts of travel on the environment, contribute to affordable housing, reduce congestion and improve quality of life for residents and workers.

The NSW Government is encouraging a mix of housing types across that have easy access to public transport. Housing with good accessibility can support higher density typologies, especially those with connections to local centres and other employment areas.

The State Environmental Planning Policy (Affordable Rental Housing) 2009 (SEPP) identifies accessible areas as land that is within:

- a) 800m walking distance of a railway station or a wharf from which a Sydney Ferries ferry service operates,
- b) 400m walking distance of a public entrance to a light rail service
- c) 400m walking distance of a bus stop used by a regular bus service

¹⁶ Department of Planning and Environment, *A Growing Plan for Sydney*, 2014

In accordance with the above, the Precinct is considered to be in an accessible location as it is within walking distance of Concord West Station which is surrounded by an array of facilities and services. The Planning Proposal will also support the objectives of *Future Transport 2056* by facilitating an improved urban design outcome with substantial residential density close to a train station, a school, supermarket and convenience shopping opportunities. This will promote the use of public transport and reduce reliance on private motor vehicles.

Low car dependency can lower overall household costs (the average cost of running a car in Australia is \$681.500 to \$1,068 per month¹⁷), reduce congestion, improve travel times, improve air quality and reduce noise and health impacts for individuals and the community.

The Precinct is expected to benefit from improved access and connectivity due to considerable future investment in Sydney Metro West, which will include a station to the south of the site at North Strathfield and Parramatta Light Rail Stage 2, which is expected to terminate at Sydney Olympic Park.

Consequently, the Planning Proposal is well positioned to access current and planned transport infrastructure, allowing for more residents to benefit from existing and planned investments and therefore representing a further positive impact.

10.5 Local amenity

Amenity has its meaning of pleasantness, but also has a physical (or tangible) component. This includes the character and appearance of buildings, proximity to commercial or recreational facilities, quality of infrastructure and absence of noise, unsightliness or offensive odours. It also has a psychological or social component.

Changes to local amenity can affect the ability of a resident, a visitor or the community to enjoy or undertake activities within the local area. The construction and operation of the proposed development has the potential to alter the local amenity and residential character of Concord West and the surrounding suburb.

10.5.1 Potential positive impacts

10.5.1.1 Maximising amenity

The proposed development is in keeping with the vision of City of Canada Bay Development Control Plan in aiming to ensure the precinct is redeveloped for high density living in a cohesive and sensitive way that is orderly, environmentally sensitive whilst promoting high quality built form and urban design outcomes.

The Planning Proposal seeks additional density beyond the existing controls of the LEP, however it intends to provide the delivery of this density with improved amenity. The provision of public open space and ground floor retail opportunities are likely to create a vibrant precinct that encourages visitation as well reflecting and nourishing the existing identity of Concord West.

Consultation with the City of Canada Bay is recommended to identify future opportunities to enhance the amenity of the Precinct through the introduction of community facilities, public art, community events and other creative and cultural opportunities.

¹⁷ Average monthly costs for light to medium cars in 2020 as sourced from RACT

10.5.2 Potential negative impacts

10.5.2.1 Reduced amenity during construction

The construction process has the potential to affect the amenity of sensitive receivers within the surrounding area. During construction, the following may affect local amenity:

- The removal of established vegetation
- The introduction of construction facilities to the environment
- Noise, dust arising from construction activities
- Unpleasant odours
- Increased traffic volumes and/or congestion.

Sensitive receivers generally relate to residents but may also include child care centres, community and recreational facilities or businesses (such as cafes and restaurants) that rely on the amenity of a locality to attract customers. Sensitive receivers located within close proximity to the Precinct include:

- Victoria Avenue Public School
- Childcare centre along Victoria avenue
- Residential properties within Liberty Grove and along George Street south of the Precinct.

A range of mechanisms can be applied to minimise any potential construction impacts on amenity. Such mechanisms are employed by most building contractors and implemented through a Construction Management Plan. Such plans tend to focus on issues such as demolition and construction staging, noise, air and water quality, construction traffic management, pedestrian safety and site management. They include simple but effective measures such as screening, noise mitigation at source and varying work hours.

These mechanisms can be as simple as avoiding noisy or disruptive construction activities during the hours when residents are likely to want to enjoy their gardens or rest, for example on evenings and weekends.

10.6 Community cohesion

Community cohesion refers to the connections and relationships between individuals and their neighbourhoods. A socially cohesive society is one which works towards the wellbeing of all its members, fights exclusion and marginalisation, creates a sense of belonging, promotes trust and offers its members the opportunity of upward mobility.¹⁸

The inverse of this concept is community severance, which refers to physical or psychological barriers between communities. The Planning Proposal has the potential to create and alleviate both of these effects.

Concord West has a diverse mix of cultures and lifestyles with a higher proportion of people from non-English speaking backgrounds (49%) and people born overseas (49%) than Greater Sydney (36% and 37% respectively). Cultural diversity is increasing with the arrival of new overseas-born residents, workers and students.

City of Canada Bay's Community Strategic Plan 2018-2030 identifies Council's vision to ensure the community have a sense of belonging, share strong relationships in friendly neighbourhoods and that local town centres are vibrant and prosperous.¹⁹

¹⁸ OECD (2011). Perspectives on Global Development 2012: Social Cohesion in a Shifting World: Executive Summary.

¹⁹ Your future 2030, City of Canada Bay 2018

10.6.1 Potential positive impacts

10.6.1.1 Integration with surrounding communities

Rapid social change, particularly in growth areas, can result in disharmony between newly arrived groups and established communities. Social tensions in the wider community can also play out at the local level. The Planning Proposal's development will be located adjacent to vibrant and active existing communities in Canada Bay LGA. The exchange and interaction between the new and existing communities is critical to the authenticity of a place and the ultimate success of the proposed development.

Social cohesion includes three elements:

- **Shared vision:** Social cohesion requires mutual respect and common aspirations, with a sense of shared identity enjoyed by members
- **Belonging to a group or community:** Social cohesion is an element of a well-functioning group or community in which there are shared goals and responsibilities and a readiness to cooperate with different members
- **A process:** Social cohesion is generally viewed not simply as an outcome but as a continuous process of achieving social harmony.⁸

Proactive, meaningful, and ongoing community engagement is an effective tool for creating integrated communities. Local governments are known and understand their communities better than any other level of government. They deliver economic, environmental and social outcomes across a range of areas which affect community cohesion. As such, they are well placed to implement initiatives to reap the benefits of stronger, more resilient and productive communities.

As the precinct sits between the train station and a major entry point into Bicentennial Park it will become a place for visitors to pass through and/or enjoy a period of stay in dining and food services or the like.

HillPDA understands that the developer is committed to working with the City of Canada Bay to ensure the community remains informed and engaged throughout the development process and creating a shared sense of ownership.

10.6.1.2 Creating socially cohesive communities

Community cohesion and sense of belonging are said to be good where communities have access to a diverse range of local and regional infrastructure, barriers to movement are minimised and there are a variety of meeting places, which encourage strong support networks.

There is significant research that indicates that better social outcomes are achieved within socially connected and cohesive communities²⁰. Social cohesion requires places and spaces for safe social interaction. The Planning Proposal includes retail facilities that can be accessed by future residents, visitors and surrounding residents.

Although the Planning Proposal does not directly provide community facilities, the Planning Proposal will provide substantial revenue to state and local government. As identified above (refer to section 10.3), these benefits are estimated to be approximately \$238.5m. A proportion of this would be used by City of Canada Bay to provide community facilities. As such, the Planning Proposal would increase the opportunities for residents to interact, which subsequently would be beneficial for community cohesion within the study area.

²⁰ Principles and guidelines, best practice open space in higher density developments project, City of Charles Sturt, South Australia

10.6.2 Potential negative impacts

10.6.2.1 Creating 'gated' communities

The Planning Proposals for new communities have the potential to be isolated and perceived as 'gated' communities. Gated communities can appear exclusive and 'unwelcoming' to surrounding communities and can create community severance and result in social segregation.

The proposed development would include convenience retail and public open space. These facilities have the potential to attract visitors from across Concord West and beyond. As such, this would increase the opportunities for residents within the Precinct, Concord West and the surrounding suburbs to interact and reduce any perceived barrier effect.

As mentioned above the precinct sits between the train station and a major entry point into Bicentennial Park it will become a place for visitors to pass through and/or enjoy a period of stay in dining and food services or the like which should reduce any perceived barrier effect.

10.7 Community health and safety

Developments can increase or decrease perceived and actual safety. Safety is a fundamental aspect of a liveable community. It is essential that the Planning Proposal applies Crime Prevention through Environmental Design (CPTED) principles to the Precinct, ensuring the area is safe and appealing to all members of the community. As identified in section 4.5.1 crimes of break and enter and non domestic assault are prevalent in the area.

10.7.1 Potential positive impacts

10.7.1.1 Safety by design

The design of the Planning Proposal intends to optimise safety and security within the development and the public domain. It provides for quality public and private spaces that are clearly defined and fit for the intended purpose. The design has capitalised on opportunities to maximise passive surveillance of public and communal areas and promote safety. A positive relationship between public and private spaces is achieved through clearly defined secure access points and visible areas that are appropriate to the location and purpose and as such the planning proposal can help to address and reduce the level of crime in the area. To that end, the Draft Precinct Plan states that in new laneways servicing the mixed use blocks *"where mixed use sites front the laneways near the railway station, active edges will improve the safety, quality and amenity of the lanes."* In this sense the proposal will likely produce benefits for public safety. Further interventions of this nature should be considered at the detailed design phase to further enhance this benefit.

10.7.1.2 Diverse and quality public open spaces

The provision of open space in high density developments is essential in ensuring the physical and social health of its residents. The amount of open space provided and the quality, location, design and diversity of this critical community asset, directly impacts the liveability of an environment. Studies indicate that people are twice as likely to engage in physical activity if they have good access to large and attractive parks and links to destinations.²¹

²¹Principles and guidelines, best practice open space in higher density developments project, City of Charles Sturt, South Australia

Residents living in high density developments are generally more reliant on public open space as they are required to undertake activities within the public domain that would generally be undertaken in backyards in more suburban settings.

The Best Practice Open Space in Higher Density Developments Project suggests that:²²

- Higher density areas should be within a 3-5 minute walk or 250m – 300m from a park
- Open space should provide links to community facilities and surrounding open space and neighbourhoods
- Successful higher density developments have around 25-50% of open space, including public, private and communal open space
- Open space should be located and designed to have balanced access to sun and shade. This includes considering appropriate amenity, aspect, prospect, surrounding building height, street setback and management of overlooking and overshadowing
- Designing open space to make the most of views and vistas is important. Good design should respond and contribute to the natural and built context.

The Planning Proposal has responded to this need through contributing approximately 3,000sqm of public open spaces in a series of pocket parks and town squares and increasing urban tree canopy from 18% to 30%. The Precinct is also adjacent to an eastern entrance to Bi-Centennial Park. This is a regional park of around 130 hectares including 40 hectares of active recreation. It includes a wide range of facilities and nature walks including wetlands and mangroves, bird sanctuary, picnic and barbeque areas, restaurant and reception, playgrounds, education centre and bike hire. These open spaces, coupled with the copies recreational facilities in the locality makes it a highly desirable area for residential development.

10.8 Social infrastructure requirements

This section identifies our assessment of the social infrastructure need to support the proposed development. The assessment has regard for:

- The forecast demographic characteristics of the Precinct and the locational characteristics of the catchment
- The likely needs of the community based on existing and projected demographic profile of the Precinct
- The capacity and adequacy of existing community facilities in the locality and region
- The application of appropriate benchmarks and rates of provision.

HillPDA has used the standards for infrastructure provision used in the Canada Bay Social Infrastructure Community Strategy (2019) as indicative benchmarks, which are outlined in the table below.

Table 38: Standards of provision

Hierarchy	Social Infrastructure Type	Threshold
Childcare and education		
Local	Early education and care	1 place per 3.8 children 0-5 years
	Out of school hours care facility	1 place per 14 children aged 5-11 years

²²Principles and guidelines, best practice open space in higher density developments project, City of Charles Sturt, South Australia

Hierarchy	Social Infrastructure Type	Threshold
	Public primary school	NSW Department of Education (DoE) does not currently have benchmarks to assess demand for new primary or high school places. New schools and school places are planned for based on growth and capacity of school facilities to accommodate this.
District	High school	
Community and cultural facilities		
Local	Local community centre	80 sqm per 1,000 residents
	Branch library	Per People Places Benchmarks: <ul style="list-style-type: none">• Fewer than 20,000 people – 57.5 sqm per 1,000• 20,001 to 35,000 – 39 sqm per 1,000• 35,001 to 65,000 – 35 sqm per 1,000• 100,000 - 31sqm per 1,000• More than 100,000 – 28sqm per 1,000.

Source: City of Canada Bay Council (2019), *Social Infrastructure (Community) Strategy and Action Plan*

This section also recommends approaches for the provision of the identified social infrastructure required to meet demand.

10.8.1 Primary and secondary schools

The City of Canada Bay Social Infrastructure Strategy states that “NSW Department of Education (DoE) does not currently have benchmarks to assess demand for new primary or high school places. New schools and school places are planned for based on growth and capacity of school facilities to accommodate this.” To this end it notes that there are no publicly available plans for new schools in the area (although a new primary school has been announced in Rhodes East). To that end, it states that priority areas for future primary schools or classrooms are:

- Rhodes/Rhodes East
- Concord
- Concord West-Liberty Grove, and
- North Strathfield.²³

What follows is an indicative assessment of demand based on likely demographic characteristics within the Planning Proposal.

10.8.2 Primary school demand

For the purposes of this study, the assumption is made that, upon completion of the development approximately 4.2% of the future population (3,516 people) would comprise of children aged between 5-11 years. This indicates approximately 148 children of primary school age would be living in the Precinct. In accordance with the ABS 2016 census data, 30 per cent of primary school children in Concord West attend non-government schools. Based on this assumption the proposed development would generate a demand for approximately 40 places in non-government schools and 103 places in government schools. This demand will need to be accommodated in existing schools.²⁴

²³ City of Canada Bay (2019, p. 78), *Social Infrastructure (Community) Strategy and Action Plan*

²⁴ HillPDA research indicated that there is capacity in the existing schools, however sources were unable to indicate the quantum of vacancies.

10.8.3 Secondary school demand

For the purposes of this study, the assumption is made that, on completion of development approximately 3.3% of the future population (3,516) would comprise of children aged between 12-17 years. This indicates approximately 116 children of secondary school age would be located in the Precinct. In accordance with the ABS 2016 census data, the majority (66 per cent) of secondary school children in Concord West attend non-government schools. Based on this assumption the proposed development would generate an anticipated demand for approximately 77 places in non-government schools and 39 places in government schools.

10.8.4 Recommended primary and secondary school provision

HillPDA does not anticipate the proposed development will generate demand for primary or secondary school places that cannot be met by existing and proposed school infrastructure.

10.8.5 Childcare

10.8.5.1 Childcare demand

The City of Canada Bay Social Infrastructure Strategy benchmark for childcare is one place for long day care per 3.8 children aged 0-5 years and 1 place for out of school care per 14 children aged 5-11 years. For the purposes of this study, the assumption is made that 5.8% of the future population (3,516) would comprise of children aged between 0-4 years which indicates approximately 204 babies and children (below 5 years old) in the Precinct and 4.2% are aged 5-11 years which equates to 148. These projections would result in an anticipated demand for approximately 54 long childcare places and 11 after school places.

As identified in section six the childcare audit indicates the childcare centres within 2km of the Precinct have the ability to accommodate 1,085 children in long day care and over 200 children in after school care. At the time of this audit (March 2021) eight of the long day care centres had some capacity to accommodate more children for long day care, with two of these centres also having after school care places available.

The provision of childcare has changed substantially in recent years, associated with shifts in government regulation and funding policy, such that the private sector is now the provider of the majority of childcare centres in Australia. As such, the supply and location of childcare in many new developments is now commonly left to market forces once need can be demonstrated.

10.8.5.2 Childcare provision

Given that there are places available for childcare services in close proximity to the Precinct (most with vacancies), and that the proposed development will only generate demand for an additional 67 childcare places, it is not recommended that a childcare facility be provided in the Precinct.

10.8.6 Community and cultural services

10.8.6.1 Community centre demand

Community centres and meeting spaces provide a range of services and facilities that cater to the needs of the broad spectrum of the community. At the local level, small community centres can act as basic meeting spaces and provide a wide range of community services. Local level community centres can often be standalone facilities or co-located with other community uses (e.g. library or cultural facility).

At a district level, multipurpose community centres and community hubs provide a number of facilities and spaces and service a wider population. Depending on the population catchment that is being served and

land/spaces available, multipurpose facilities can be provided as either a community space or a standalone centre.

The City of Canada Bay Social Infrastructure Strategy benchmark identifies a standard provision of 80sqm of community floor space for every 1,000 people, which equates to an additional demand for approximately 280sqm of floor space.

The community facilities audit conducted indicates that the existing local and district level community facilities are unlikely to be capable of accommodating the needs of the existing or future population. The community facilities audit indicates an existing undersupply in community facilities with only one (181sqm) community space within the Concord West SA2 which has a population of 16,374. Based on the 80sqm of community floor space for every 1,000 people, the existing community facility only provides sufficient space to meet the demand of approximately 2,260 people. This indicates a severe undersupply of community floor space in the suburb and a need for additional community spaces.

10.8.6.2 Library demand

Public libraries make a vital contribution to the social, educational and recreational development of local communities. *People Places: A Guide for Public Library Buildings in New South Wales (NSW State Library)* identifies that despite the growth of digital and online resources, the physical library is very relevant and increasingly in demand as a social space.

According to the *City of Canada Bay Social Infrastructure Strategy benchmark* for a library based on the population catchment it is to serve has a sliding scale:

- Fewer than 20,000 people – 57.5 sqm per 1,000
- 20,001 to 35,000 – 39 sqm per 1,000
- 35,001 to 65,000 – 35 sqm per 1,000
- 100,000 - 31sqm per 1,000
- More than 100,000 – 28sqm per 1,000.

In accordance with benchmark, the Precinct would generate demand for approximately 137sqm of additional library floor area.

10.9 Access and connectivity

The Precinct is considered to be in a highly accessible location as it is directly adjacent to Concord West Train Station, from which Sydney CBD can be reached in approximately 21 minutes and Parramatta CBD in approximately 26 minutes. This high connectivity will be further heightened with the future Sydney Metro West service.

10.9.1 Potential positive impacts

10.9.1.1 Transport Oriented Development

Any growth creates challenges and demand for additional and new social infrastructure and open space to accommodate the needs of the existing and future population. Transport orientated development (TOD) provides an opportunity to meet this demand through a network of well-designed, highly accessible, medium–high density urban developments focused within 800m of transit stations.

The number of TODs are growing in Sydney, as evidenced by the renewed focus on value capture. Creating developments over or next to transit hubs provides numerous direct and indirect socio-economic benefits such

as improved environmental sustainability through reduced energy and water conservation and decreasing car dependency therefore reducing greenhouse emissions.

Done well, TODs create people focused neighbourhoods which in turn increase pedestrianisation uptake (walking and cycling) whilst improving health and opportunities for improved social mix and interaction, quality of life and lifestyle for communities who live within them.

From a socio-economic perspective it makes sense to increase housing supply and density near transport hubs as this contains urban sprawl, which may reduce the costs of the Government and the private sector in providing infrastructure to meet future growth.

The Planning Proposal will serve the objectives of the Greater Sydney Region Plan, Eastern City District Plan and YOUR future 2030 by facilitating an improved urban design outcome with substantial residential density close to public transport options. This will promote the use of public transport and reduce reliance on private motor vehicles.

10.9.1.2 Retail reduces car dependency

As Identified above it is envisaged that the retail will be convenience retail serving the local walkable catchment. The majority of trade is likely to be from foot traffic including train commuters rather than car based shopping. The provision of retail floorspace in Concord West would primarily serve the immediate catchment and in turn would reduce the need for these residents to travel to other shopping destinations to meet most of their basic needs for food, groceries and local services. As a result, this would reduce the number of private motor vehicle trips, the number of kilometres travelled, vehicle operating costs and vehicle emissions, resulting in significant improvements in transport and environmental sustainability.

10.9.2 Potential negative impacts

10.9.2.1 Congestion and parking requirements

High density residential developments often result in concerns among the local community in regards to parking requirements and additional traffic congestion due to population growth within the locality. As identified in Chapter 4.0 the median number of motor vehicle per household is 1.3 which is already lower than Greater Sydney (1.7). These low car ownership rates, the low occupancy rates typical of high-density development and the good accessibility to public transport indicate that the development is not likely to adversely affect local traffic and parking demand. A traffic assessment conducted at the detailed design phase could further assist with the minimisation of negative impacts arising from traffic.

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