

COVID-19 is an unprecedented global health crisis and a global economic event that is rapidly evolving. In these circumstances the economic environment is extremely uncertain, especially where the forecasting of economic trends is involved. In this report, the research and analysis of economic data – such as forecasts of economic activity, population and employment growth, and so on – reflects a “business as usual” scenario, while also noting the potential impacts that may be associated with COVID-19 and the anticipated return to growth in economic indicators.

Report version no 5 (31 March 2022): report has been updated with scheme figures as of March 2022. All other analysis, forecasts data remain as per previous 2020 version.

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Executive Summary

This Housing Study has been prepared by Ethos Urban to guide the development of the proposed planning controls for the Cherrybrook Station State Significant Precinct.

The Cherrybrook State Significant Precinct (SSP) is centred around the new Cherrybrook Station on the Metro North West Line, which opened in May 2019. The new station has delivered a fast and efficient connection with the Norwest and Chatswood commercial and entertainment districts and the Sydney region more broadly – driving increased development potential and housing supply opportunities.

NSW DPE envisages that:

“The station precinct has the potential to become a vibrant local town centre with new shops and services, quality public spaces and a broad choice of housing, amenities (including car parking) and open spaces, while protecting Cherrybrook’s existing neighbourhood character.”¹

This Housing Study supports Landcom’s rezoning proposal for the State Significant Precinct, and has been directly informed by the above stated vision for the precinct.

Scope

The components of this Housing Study have been specified through NSW Department of Planning and Environment’s (NSW DPE) Study Requirements for the precinct, as follows:

- Provide a housing needs and forecasting analysis for the precinct to identify the appropriate mix of dwelling types and sizes necessary to support a diverse, healthy and socially sustainable community;
- Consider the need to increase housing diversity;
- Demonstrate how the proposed planning controls will support the achievement of housing and development objectives;
- Demonstrate how the proposal will meet NSW Government’s commitment to delivering more Affordable Housing in *A Plan for Growing Sydney*, including the affordable rental housing target of 5-10% of new residential floorspace (North District Plan) particularly for government-led urban renewal projects.

Methodology

To develop this Housing Study, the following stages of analysis were undertaken:

1. Define study area, i.e., the geographic catchment likely to generate demand for housing in the Cherrybrook SSP.
2. Define key project parameters, assumptions and principles to guide the study.
3. Review Cherrybrook State Significant Precinct context information, including geographic and development context, social and economic context and strategic policy context.
4. Undertake a housing need (supply and demand) analysis, including analysing current housing supply by type, tenure and affordability, likely demand for housing and demographic profile for a comparable housing subdivision, to ascertain likely future population profile of Cherrybrook State Significant Precinct.
5. Synthesise analysis to ascertain key housing supply drivers, gaps and opportunities,
6. Develop Study recommendations, including principles for delivery of housing supply, recommendations on housing mix and delivering affordable housing supply.
7. Prepare planning advice on controls and guidelines to implement study recommendations.

¹ NSW DPE 2020, “Cherrybrook Station Precinct,” <<https://www.planning.nsw.gov.au/Plans-for-your-area/Priority-Growth-Areas-and-Precincts/Cherrybrook-Station-Precinct>>

Cherrybrook State Significant Precinct (SSP) context

The Housing Study for Cherrybrook SSP has been informed by the following key geographic and socio-economic factors relating to the context of the area:

- Improved accessibility and connectivity in the area due to the delivery of Metro North West Line: Cherrybrook SSP is located around Cherrybrook Station, which offers residents high frequency, high capacity public transport connections to employment, education and entertainment opportunities in Chatswood and other centres (including North Sydney CBD and Sydney CBD in the medium term future).
- Catalyst for urban renewal: Delivery of the metro has catalysed urban renewal and increased opportunities for high density housing in the North District.
- Established low density neighbourhood, dominated by owner occupiers and larger households: The study area has a very high proportion of separate houses, dwellings owned outright or being purchased, and larger household sizes compared with the Greater Sydney average.
- Limited existing social infrastructure near Cherrybrook Station: As the site is located in an outer suburban area, which has been characterised by low density development, there is limited local social infrastructure within walking distance of the study area, apart from public open space and schools.
- Affordability, diversity and liveability are key priorities for the delivery of housing in the Cherrybrook SSP: It is a state and local priority to increase housing supply, choice and affordability in areas close to jobs, services and public transport, such as Cherrybrook.

Housing needs (supply and demand) analysis

Existing planning controls have prevented the development of a higher-density residential market in Cherrybrook. The opportunity to provide such a market around the Cherrybrook Station is considered likely to be strongly supported due to its access to high-frequency rail-based public transport and the relatively high-median house price of the surrounding area.

The housing needs analysis highlights the following key findings and conclusions:

- The demographic profile of Cherrybrook (the Study Area) is that of a family-based suburb with detached housing as the predominant built form. As the population ages, the Study Area is gradually declining in population and a growing number of households are Couple Families without Children.
- A significant contributor to the Study Area's current age profile and urban composition is that it is fully built out and the planning scheme presently provides little scope for different housing typologies such as medium and higher density housing.
- Within this urban profile, the Cherrybrook Station and the immediate area around the station represents an opportunity to provide housing diversity that has, to date, been absent from the local market. In addition, it will provide a more diverse housing typology to the Study Area, which will attract a younger and more diverse demographic. In turn, this is likely to slow the rate of aging in the Study Area
- In comparable areas with rail-based public transport infrastructure, demand for higher-density forms of housing has been significant. In the case of Cherrybrook, the provision of new high-capacity and high-frequency rail-based public transport infrastructure at a best practice (for Australia) level is considered almost certain to prove popular with both home buyers and the rental market.
- Additionally, the median house price in Cherrybrook (\$1.4 million in 2019/20) suggests that the future high-density apartment market is likely to be at, or around, the price range required to support a significant high-density apartment market compared to median price of houses within the local area. The presence of the Cherrybrook Station adjacent to a high density precinct at Cherrybrook is likely to add further weight to Cherrybrook as an attractive high density market. This is demonstrated by previous research which points to a strong link between the median house price of the surrounding area and the commercial viability of undertaking higher density residential development.

Recommendations

The Housing Study draws on the analysis of geographic and socio-economic context, policy drivers and housing needs analysis to identify principles and recommendations for the delivery of housing supply through the SSP planning process.

Cherrybrook Station Precinct represents a unique opportunity along the Metro North West corridor, as the only non-greenfield site not centred on an established centre. As an established low density housing area, the Cherrybrook SSP offers significant scope for urban renewal, placemaking and opportunities for innovation.

Key recommendations for the future housing mix in the Cherrybrook SSP include:

- Increase housing choice in the Cherrybrook SSP by delivering high density housing options;
- Deliver high density housing for a range of household types;
- Deliver three-bedroom apartments appropriate for family households with children, downsizers, and multi-generational housing;
- Deliver adaptable housing to provide opportunities for downsizing and ageing in place;
- Delivering some smaller apartments appropriate for lone person households and first home buyer couples;
- Meet demand for housing with high design quality;
- Deliver a liveable neighbourhood with social infrastructure, retail and other services and amenities to meet residents' daily living needs;
- Deliver great public open spaces to support increased density and population growth;
- Deliver housing that is sustainable and resilient to climate change, and
- Deliver housing that is responsive to the bushland character of the area.

Key recommendations for delivering affordable rental housing in the Cherrybrook SSP include:

- Consider a range of approaches to determining rental costs for affordable rental housing;
- Ensure all affordable rental housing is 'tenure blind,' and
- Concentrate affordable rental housing units in a single building to improve management efficiencies for community housing providers.

1.0 Introduction

1.1 Overview

This study relates to a proposal to develop land called the 'Cherrybrook Station Government Land State Significant Precinct' (the State Significant Precinct) by Landcom on behalf of the landowner, Sydney Metro. The State Significant Precinct is centred around Cherrybrook Station on the Metro North West Line. The Metro North West Line delivers a direct connection with the strategic centres of Castle Hill, Norwest, Macquarie Park and Chatswood. It covers 7.7 hectares of government-owned land that comprises the Cherrybrook Station, commuter carpark and station access road (Bradfield Parade) and vacant land to the east of the station (referred to as the Developable Government Land) (DGL). It is bound by Castle Hill Road (south), Franklin Road (south east) and Robert Road (north west).

As a State Significant Precinct, the Minister for Planning and Public Spaces (the Minister) has determined that it is of State planning significance and should be investigated for rezoning. This investigation will be carried out in accordance with study requirements issued by the NSW Department of Planning, Industry and Environment (now Department of Planning and Environment (DPE)) in May 2020. These study requirements were prepared in collaboration with Hornsby Shire Council and The Hills Shire Council.

The outcome of the State Significant Precinct process will be new planning controls. This will enable the making of development applications to create a new mixed-use local centre to support Cherrybrook Station and the needs of the local community.

At the same time, DPE is also working with Hornsby Shire and The Hills Shire Councils, as well as other agencies such as Transport for NSW, to undertake a separate planning process for a broader area called the Cherrybrook Precinct. Unlike the State Significant Precinct, the outcome of this process will not be a rezoning. Instead, it will create a Place Strategy that will help set the longer term future for this broader area. Landcom will be consulted as part of this process.

Figure 1 over page illustrates the site boundaries of the State Significant Precinct and the Cherrybrook Precinct.

1.2 Purpose of this study

The purpose of this study is to address the relevant study requirements for the State Significant Precinct, as issued by DPE. It is part of a larger, overall State Significant Precinct Study. This State Significant Precinct Study undertakes planning investigations for the precinct in order to achieve a number of objectives that are summarised as follows (refer to the State Significant Precinct Study Planning Report for a full list of the study requirements):

- facilitate a mixed-use local centre at Cherrybrook Station that supports the function of the station and the needs of the local community
- deliver public benefit through a mixed use local centre
- deliver transport and movement initiatives and benefits
- demonstrate the suitability of the site for the proposed land uses
- prepare a new planning framework for the site to achieve the above objectives.

This Housing Study has been prepared to guide the development of the reference scheme and the proposed planning controls for the Cherrybrook Station State Significant Precinct.

The components of the Housing Study have been specified through NSW Department of Planning and Environment's (NSW DPE) Study Requirements for the precinct, as follows:

- Provide a housing needs and forecasting analysis for the precinct to identify the appropriate mix of dwelling types and sizes necessary to support a diverse, healthy and socially sustainable community.
- Consider the need to increase housing diversity.

- Demonstrate how the proposed planning controls will support the achievement of housing and development objectives.
- Demonstrate how the proposal will meet NSW Government's commitment to delivering more Affordable Housing in *A Plan for Growing Sydney*, including the affordable rental housing target of 5-10% of new residential floorspace (North District Plan) particularly for government-led urban renewal projects.

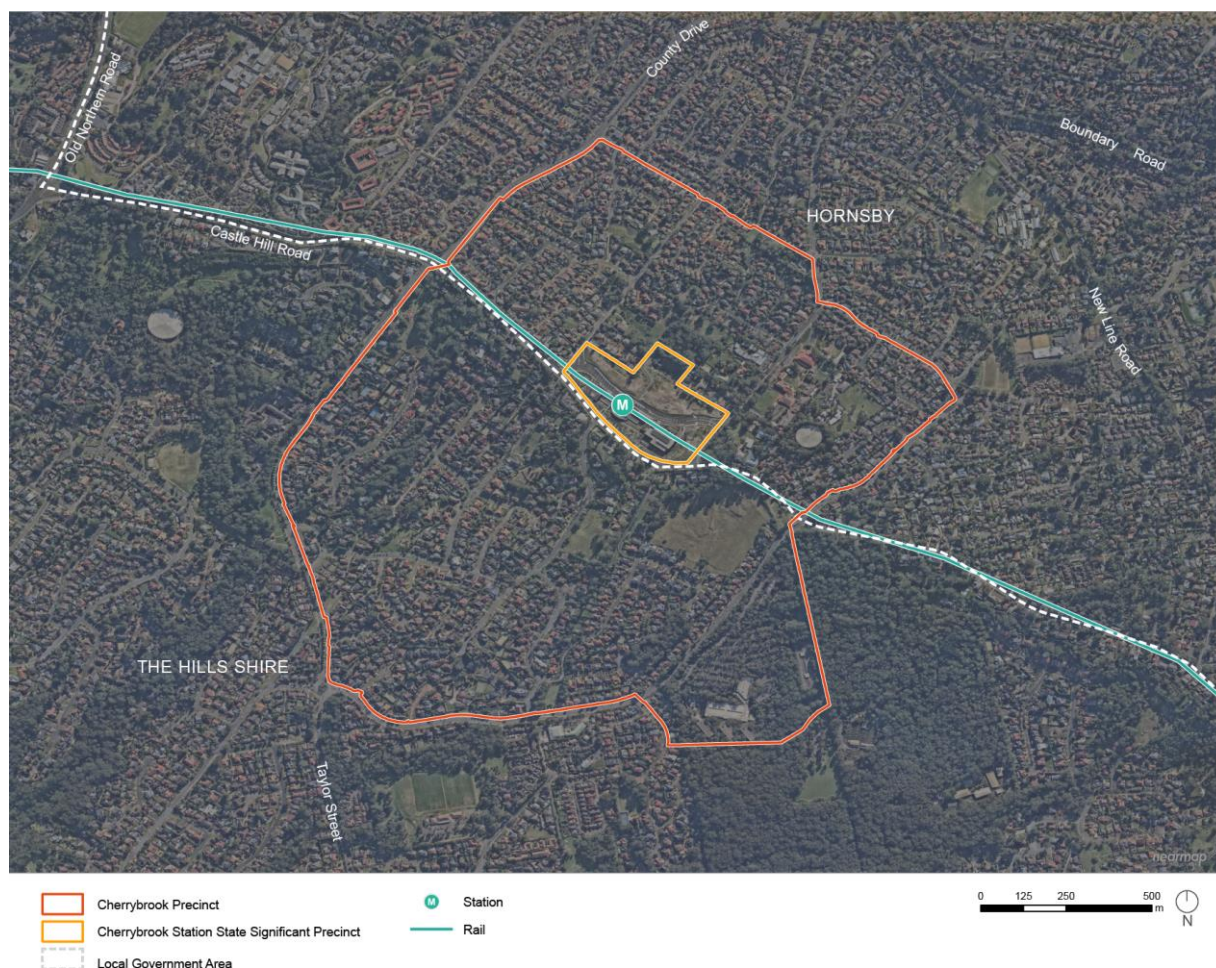


Figure 1 Cherrybrook Precinct and Cherrybrook Station State Significant Precinct (subject of this proposal)

Source: NSW Department of Planning, Industry & Environment

1.3 Proposal

The proposed new planning controls for the State Significant Precinct are based on the investigations undertaken as part of the State Significant Precinct Study process. A Reference Scheme has also been prepared to illustrate one way in which the State Significant Precinct may be developed in the future under the proposed new planning controls.

The proposed planning controls comprise amendments to the Hornsby LEP 2013 to accommodate:

- Rezoning of the site for a combination of R4 High Density Residential, B4 Mixed Use and RE1 Public Recreation zoned land;
- Heights of between 18.5m – 22m;
- FSR controls of 1:1 – 1.25:1;
- Inclusion of residential flat buildings as an additional permitted use on the site in the B4 Mixed Use zone;

- Site specific LEP provisions requiring the delivery of a minimum quantity of public open space and a maximum amount of commercial floor space; and
- New site-specific Design Guide addressing matters such as open space, landscaping, land use, built form, sustainability and heritage.

The Reference Scheme (refer to **Figure 2**) seeks to create a vibrant, transit-oriented local centre, which will improve housing choice and affordability and seeks to integrate with Hornsby's bushland character. The Reference Scheme includes the following key components:

- Approximately 33,350m² of residential GFA, with a yield of approximately 390 dwellings across 12 buildings ranging in height from 2 to 5 storeys (when viewed from Bradfield Parade).
- A multi-purpose community hub with a GFA of approximately 1,300m².
- Approximately 3,200m² of retail GFA.
- Over 1 hectare of public open space, comprising:
 - A village square with an area of approximately 1,250m², flanked by active retail and community uses.
 - A community gathering space with an area of approximately 3,250m².
 - An environmental space around the pond and Blue Gum High Forest with an area of approximately 8,450m².
- Green corridors and pedestrian through site links, providing opportunities for potential future precinct-wide integration and linkages to the north.



Figure 2 Reference scheme

Source: SJB

2.0 Methodology

This section outlines the methodology that has been applied to develop study findings and recommendations.

2.1 Stages of analysis

To develop this study, the following stages of analysis were undertaken:

1. Define study area, i.e., the geographic catchment likely to generate demand for housing in the Cherrybrook SSP.
2. Define key project parameters, assumptions and principles to guide the study, including:
 - Delivering on the specified goal of housing supply being appropriate to support a diverse, healthy and socially sustainable community, and
 - Delivering economic opportunity and inclusion through new housing being delivered adjacent to the new metro station, which provides connectivity to employment and social opportunities.
3. Review Cherrybrook State Significant Precinct context information, including:
 - Geographic and development context, in relation to access to social infrastructure; public transport infrastructure (noting the site's location next to the metro station), and other existing and planned amenities and services – including local retail – that will influence the site's liveability, amenity and housing market appeal;
 - Social and economic context that may impact community needs and housing supply parameters – including attitudes and aspirations as expressed in Hills and Hornsby Shire Council's Community Strategic Plans and Local Strategic Planning Statements;
 - Strategic policy context, including applicable state and local policies relating to housing supply and diversity, affordable housing supply, and socially and economically sustainable development.
4. Undertake a housing need (supply and demand) analysis:

Analyse current housing supply within study area catchment, within the Hills Shire LGA and within similar housing markets in the broader district, across the following variables:

 - Type (e.g., house; apartment; townhouse);
 - Tenure (rented versus owned in the private market; social and affordable housing), and
 - Affordability (median rent and sales prices in relation to lower 40% of income earners paying more than 30% of gross household income on rent).
 - Analyse likely demand for housing within the study area catchment and LGA, by analysing demographics (current and forecast) for the designated housing market catchment including size/forecast growth rate, age, household size, household type;
 - Review the demographic profile for a comparable housing subdivision, to ascertain likely future population profile of Cherrybrook State Significant Precinct.
5. Synthesise analysis to ascertain key housing supply drivers, gaps and opportunities, with a view to delivering on key project principles/ goals (e.g., socio-economic diversity and inclusion; access to opportunity linked with the new metro station).
6. Develop Study recommendations, including:
 - Principles for delivery of housing supply to be drawn through the SSP planning process;
 - Recommendations on housing mix – including supply and diversity – types and tenures, and
 - Recommendations on delivering affordable housing supply, as per the NSW Government's target – including advice on effective planning mechanisms for implementing the target, and other issues such as effective affordable housing delivery models (e.g., single building/s to support CHPs' sustainable operations; tenure blind in design).
7. Prepare planning advice on controls and guidelines to implement study recommendations.

2.2 Study area definition

The study area for this catchment has been defined based on the ABS Census SA1 statistical collection districts that align most closely with the Cherrybrook State Significant Precinct (see **Figure 3**).

This Study Area is considered to represent the area most likely to generate demand for housing in the Cherrybrook SSP.

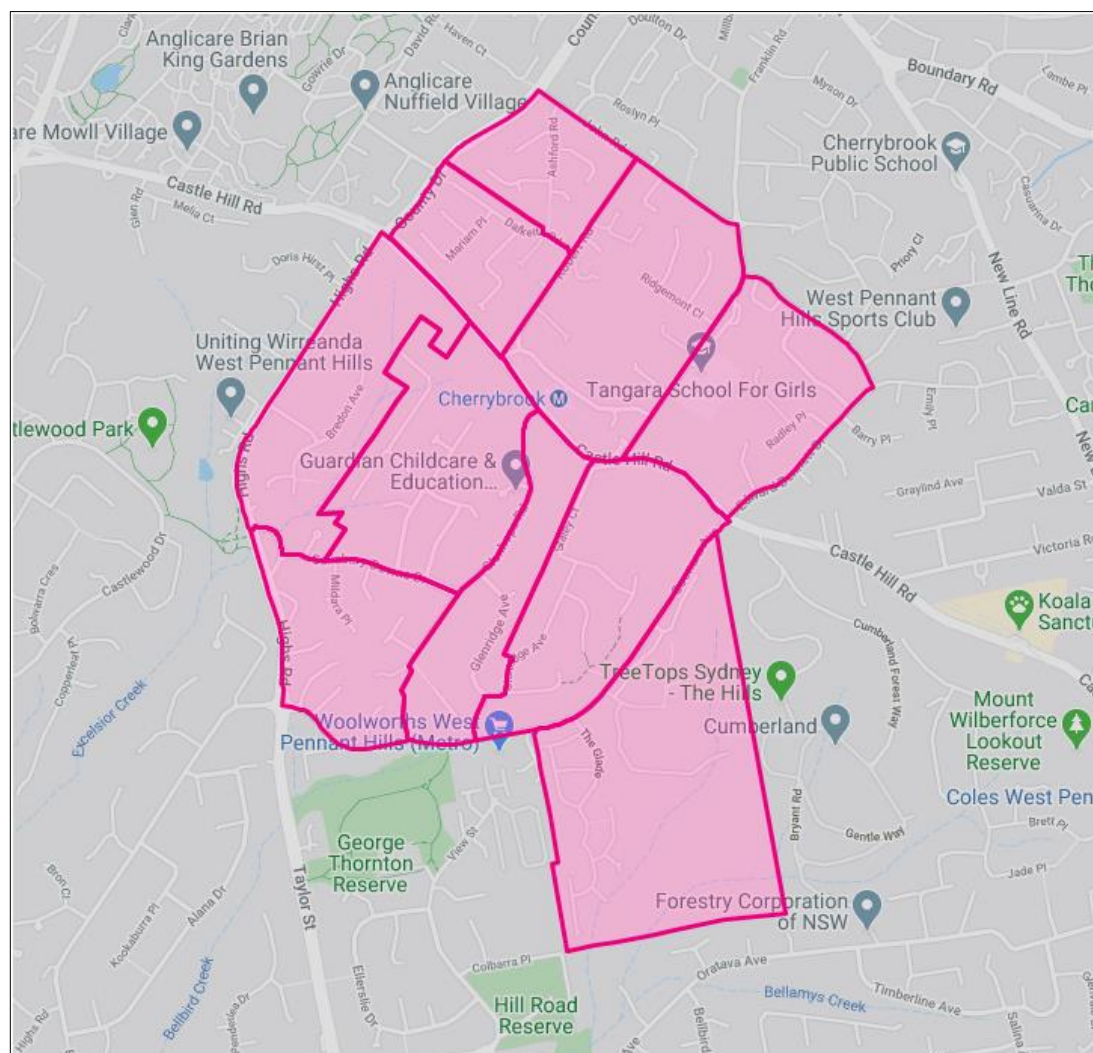


Figure 3 Study area

Source: Ethos Urban/Remplan.com.au

2.3 Study parameters

The Housing Study has been informed by the following parameters:

- Study Area alignment of selected SA1s with Cherrybrook Station Structure Plan boundary (ref **Figure 3**);
- Study Area boundaries established to enable data to be drawn through Census SA1 districts, without breaking up districts;
- Housing capacity in the Study Area targeted at minimum 3,200 dwellings by 2036, as per the Cherrybrook Station Structure Plan (NSW DPE, 2013).
- An envisaged local housing market for the precinct – enabling us to understand market demand (demographics) and drivers (current supply, prices etc) within this envisaged market catchment.
- Alignment with Landcom's strategic aims and objectives, and other relevant strategies and policies.

2.4 Study assumptions

The Housing Study has been informed by the following assumptions:

- Key findings of the economic analysis are based on the needs of the localised catchment, noting that in reality, home buyers may be attracted to the location from beyond this catchment due to the direct accessibility to high frequency, high capacity public transport.
- Due to the length of planning processes and construction, it will be in the order of 5-7 years before occupation of housing in the Cherrybrook Station Precinct can take place.
- Housing in the study area will be attractive to a localised market catchment.
- The Greater Sydney Commission's affordable housing targets (5-10% of uplift) will be delivered on site as affordable rental housing.
- It is assumed that there will be a market for high density apartment stock, given the precinct's accessibility to high quality, high frequency public transport via Cherrybrook Station, and having regard for the relatively high median house price of the surrounding area. It is noted that recent high density development in Castle Hill, which has some similar attributes to Cherrybrook, has been successfully undertaken.
- The findings of the housing study will inform the development of the preferred masterplan and the proposed planning controls for the State Significant Precinct Study.

A note on COVID-19 impacts

This Study is based on pre-COVID-19 forecasts. COVID-19 is an unprecedented global health crisis and economic event that is rapidly evolving. In these circumstances the short-term economic environment is extremely uncertain, especially where the forecasting of economic trends is involved.

At the current time, the research and analysis of economic data – such as forecasts of economic activity, population, employment growth, housing supply, and so on – reflects a return to “*business as usual*” scenario, while also noting the potential impacts that may be associated with the COVID-19 virus and the anticipated return to growth in economic indicators.

Where required, we will be clear where a specific consideration of the implications of COVID-19 is being provided outside a business-as-usual scenario.

3.0 Cherrybrook SSP context

The following section provides a contextual analysis of the Cherrybrook State Significant Precinct (SSP) to identify geographic factors that will influence the precinct's liveability, amenity and housing market appeal.

This section also provides an analysis of the social and economic context that may influence housing needs and housing supply parameters, as well as identifying strategic policy drivers related to housing supply and diversity in this area.

Key findings

The Housing Study for Cherrybrook SSP has been informed by the following key geographic and socio-economic factors relating to the context of the area:

- **Improved accessibility and connectivity in the area due to the delivery of the Metro North West Line:** Cherrybrook SSP is located around Cherrybrook Station, which offers residents high frequency, high capacity public transport connections to employment, education and entertainment opportunities in Chatswood and other centres (including North Sydney CBD and Sydney CBD in the medium term future).
- **Catalyst for urban renewal:** Delivery of the Metro has catalysed urban renewal and increased opportunities for high density housing in the North District.
- **Established low density neighbourhood, dominated by owner occupiers and larger households:** The study area has a very high proportion of separate houses, dwellings owned outright or being purchased, and larger household sizes compared with the Greater Sydney average.
- **Limited existing social infrastructure near Cherrybrook Station:** As the site is located in an outer suburban area, which has been characterised by low density development, there is limited local social infrastructure within walking distance of the study area, apart from public open space and schools.
- **Affordability, diversity and liveability are key priorities for the delivery of housing in the Cherrybrook SSP:** It is a state and local priority to increase housing supply, choice and affordability in areas close to jobs, services and public transport, such as Cherrybrook.

3.1 Geographic and development context

The following section provides an overview of the geographic and development context of the Cherrybrook SSP, including the impact of investment in the new Metro North West Line and planning for the Cherrybrook Station Precinct.

3.1.1 Public transport investment

The Cherrybrook SSP is located around the Metro North West Line, which currently offers reliable high speed, high frequency train services between Tallawong and Chatswood Stations. When Sydney Metro is extended into the central business district (CBD) and beyond in 2024, metro rail will run from Sydney's North West region under Sydney Harbour, through new underground stations in the CBD and beyond to the south west (see **Figure 4** over page).

Currently, there are high levels of car ownership and dependence in the Hills and Hornsby LGAs,² where the study area is located, and Hills Shire Council has stated that: "traffic congestion detract[s] from the attractiveness of strategic centres."³

Delivery of new housing in proximity to Cherrybrook Station will offer new opportunities for public transport connectivity and accessibility, including connecting Cherrybrook residents by high quality public transport to major centres in Castle Hill, Norwest and Macquarie Park, and in the future North Sydney CBD and Sydney CBD. Delivering a "30-minute city" by improving the walkability, connectivity and accessibility of our centres and neighbourhoods is a priority for both Councils – as per Greater Sydney Commission goals laid out in the Greater

² Profile ID, Community Profile: Hornsby Shire Council <https://profile.id.com.au/hornsby>; Profile ID, Community Profile: Hills Shire Council <https://profile.id.com.au/the-hills>

³ Hills Shire Council 2019, *Productivity and Centres Strategy*, p.25

Sydney Region Plan, and the delivery of the metro has delivered new local and regional connectivity that will assist these Councils in achieving their goal.

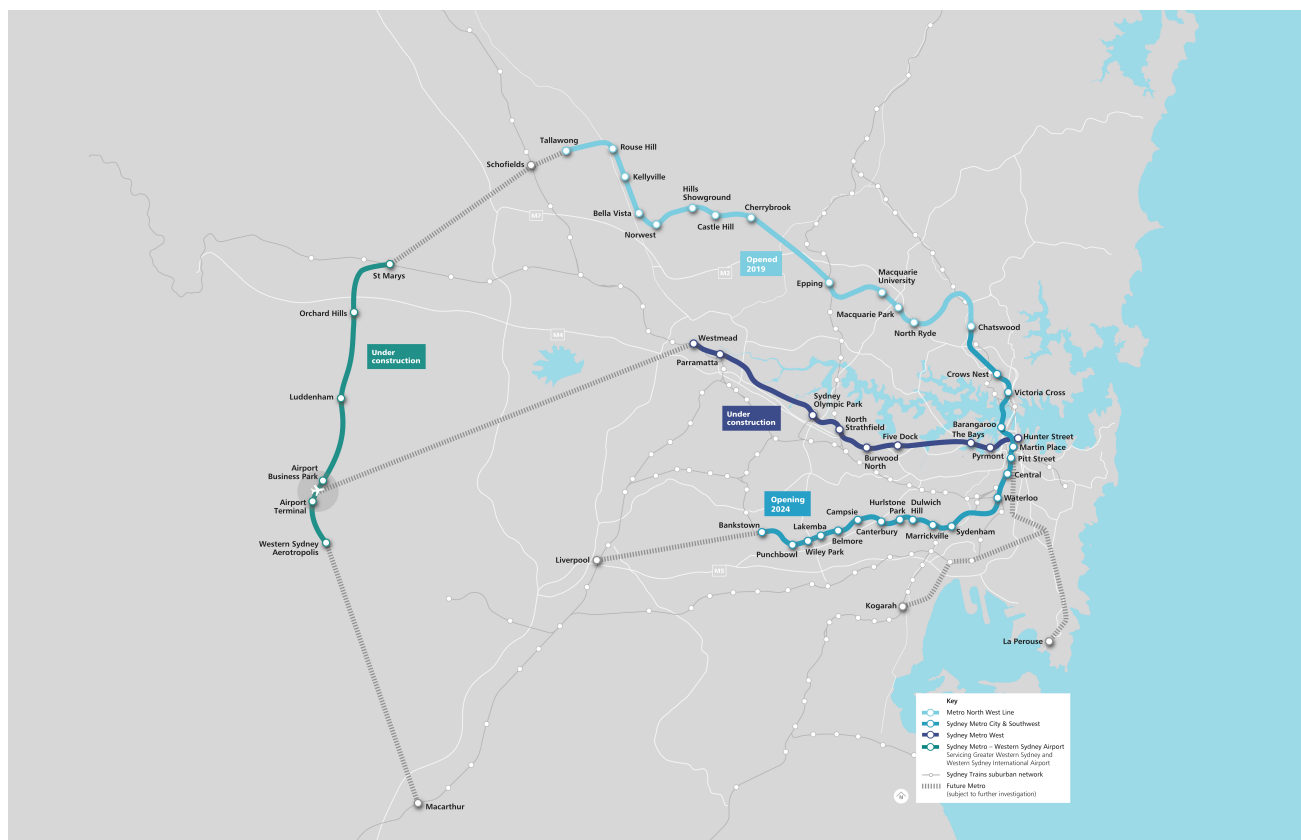


Figure 4 Metro North West Line

Source: Transport for NSW, 2021

3.1.2 Catalysing urban renewal – Cherrybrook Station Precinct

The delivery of the Metro North West Line has catalysed urban renewal around new stations across the North West District, where the Cherrybrook SSP is located.

The Cherrybrook Station Precinct is the easternmost precinct within the Northwest Urban Corridor located within the Hornsby Shire and Hills Shire LGAs, which are separated by Castle Hill Road, a major arterial road which intersects the Precinct.

The Precinct currently primarily comprises low density residential development and covers an area of approximately 187Ha. The housing typology typically comprises of one to two-storey mostly detached houses on large lots surrounded by areas of vegetation.

The nearest local centre is the Coonara Village Shopping Centre which lies immediately outside the periphery of the Precinct. The new station at Cherrybrook is expected to serve as an 'origin' station for the surrounding residential population in the suburbs of Cherrybrook and West Pennant Hills.

3.2 Social and economic context

3.2.1 Community profile

The following section provides a brief snapshot of the demographic characteristics of the study area, compared with the Greater Sydney benchmark (the boundaries of the study area are shown in **Section 2.2**). Data has been sourced from the Australian Bureau of Statistics (ABS) 2016 Census of Population and Housing, and a comprehensive demographic profile is provided in **Appendix B**.

Key demographic characteristics of the study area currently include:

- **Slightly older median age:** The median age in the study area is 40.7 years, compared with 36.4 years in Greater Sydney.
- **Culturally and linguistically diverse community:** 57.8% of residents of the study area speak English at home, compared with 62.5% of residents of Greater Sydney. The top languages other than English spoken in the study area were Mandarin (9.8%), Cantonese (7.6%), Hindi (2.8%) and Korean (2.8%).
- **Majority of households are families:** 93.2% of households in the study area are couples, with or without children, compared with 61.3% of households across Greater Sydney. Only 6.1% of households in the study area are lone person households, compared with 21.7% across Greater Sydney. The average household size in the study area is 3.3 persons per dwelling, compared with 2.8 across Greater Sydney.
- **Almost all dwellings are separate houses:** 93.4% of dwellings in the study area are separate houses, compared with 57.2% of dwellings across Greater Sydney. There were no flats, units or apartments in the study area at the time of the 2016 Census.
- **Dwellings are less likely to be rented:** 87.2% of dwellings in the study area are either owned outright or being purchased via mortgage, compared with 64.2% of dwellings across Greater Sydney.
- **High levels of car dependence:** 79.3% of residents in Hills Shire travelled to work via private vehicles, while only 18.9% used public transport compared to 68.1% of residents in Greater Sydney using private vehicle and 26.4% using public transport.
- **High levels of car ownership:** 79.5% of households in the Study Area owned two or more cars compared to 50.1% of households in Greater Sydney. Households in the Hills Shire had similar share of car ownership at 74.3%, while households in Hornsby Shire were more similar to the Greater Sydney share at 57.5%.

3.2.2 Local social infrastructure context

The following section provides an overview of social infrastructure in the within walking distance of Cherrybrook Station, and in proximity to the study area. An approximate walking distance of 400m-800m (10-15 mins) from the Cherrybrook Station has been applied.

The findings of this local social infrastructure review have also been informed by the *Cherrybrook Station Government Land State Significant Precinct: Social Infrastructure Needs Assessment* prepared by Cred Consulting. This report includes an audit of all community facilities within 2km of the site, as shown in **Figure 5**.

An overview of the local social infrastructure context is provided in order to assess the accessibility and availability of social infrastructure in proximity to future housing in the Cherrybrook SSP. The following social infrastructure types have been reviewed:

- Community facilities
- Libraries
- Education facilities
- Public open space
- Emergency services
- Sport and recreation facilities
- Aquatic and leisure facilities

- Childcare centres
- Aged care facilities
- Cultural and creative facilities
- Health facilities.

Given the precinct's location in an outer suburban area, which has been characterised by low density development, there is limited local social infrastructure within 400m-800m walking distance of the site.

As the Cherrybrook SSP grows, increased provision of social infrastructure within and in proximity to the precinct would need to be delivered to support community wellbeing and liveability. This aim is clearly captured in NSW Government's vision for the precinct:

*"The station precinct has the potential to become a vibrant local town centre with new shops and services, quality public spaces and a broad choice of housing, amenities (including car parking) and open spaces, while protecting Cherrybrook's existing neighbourhood character."*⁴

Community facilities

There is one community centre close to the edge of the study area – West Pennant Hills Valley Community Centre. This facility is not within 800m walking distance from the station. The site is also a short drive from Castle Hill Senior Citizens Centre.

Libraries

There are no libraries in proximity to the site.

Education facilities

The site is located with proximity to four schools: a government primary school at Cherrybrook Public School, and three independent schools at Tangara School for Girls, Hills Montessori School and St Bernadette's Primary School.

Sports and recreation facilities

There is one sports club close to the study area – West Pennant Hills Sports Club.

Childcare centre, aged care facilities, hospitals and health facilities

There are no childcare centres, aged care facilities, hospitals or health centres within proximity of the study area.

Cultural and creative facilities

There are no cultural and creative facilities within proximity of the study area.

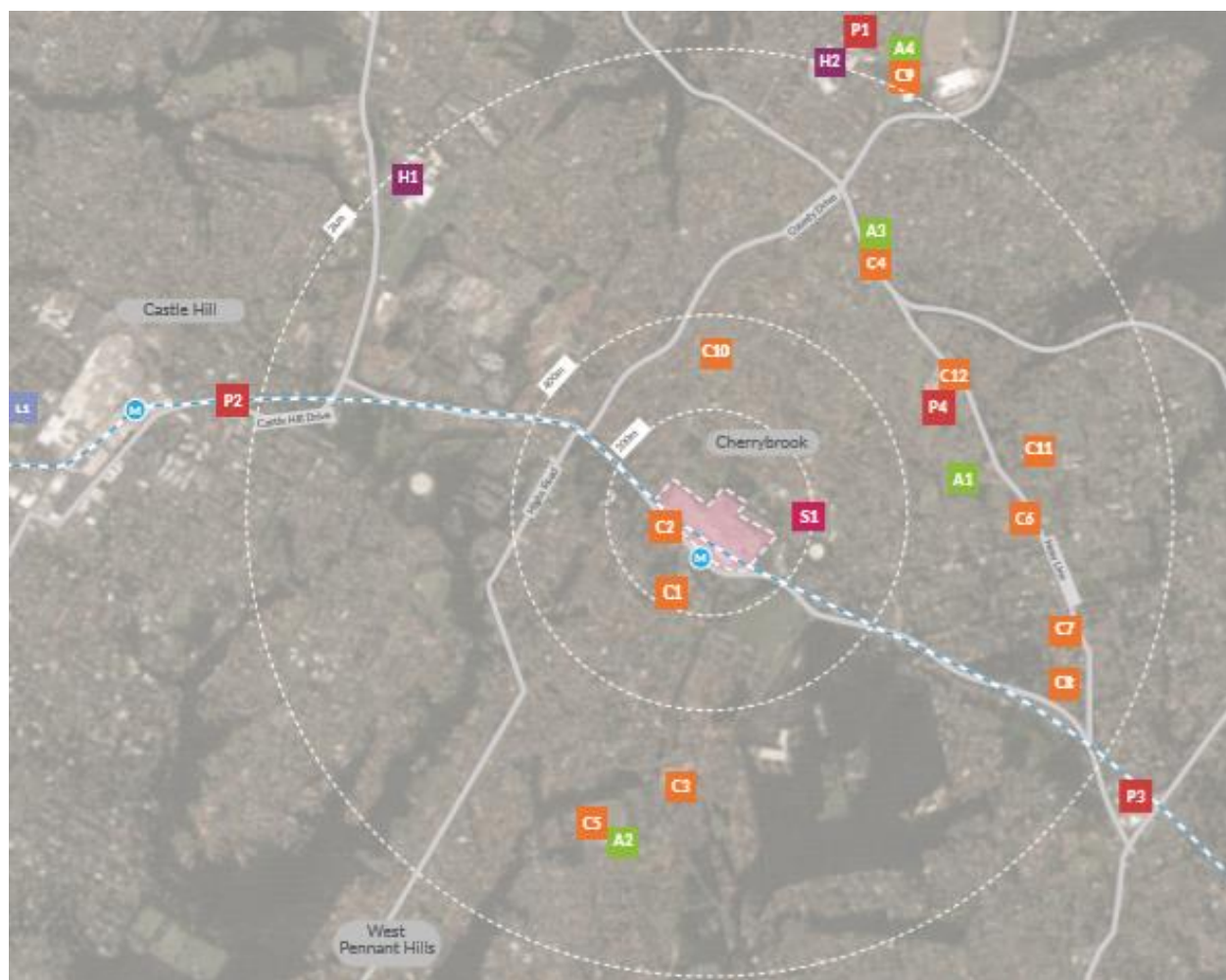
Public open space – local

There are several local open spaces within proximity of the study area, which provide a variety of outdoor recreation opportunities.

Places of worship

There are seven places of worship within proximity of the study area.

⁴ NSW DPE 2020, "Cherrybrook Station Precinct," <<https://www.planning.nsw.gov.au/Plans-for-your-area/Priority-Growth-Areas-and-Precincts/Cherrybrook-Station-Precinct>>



Map Ref	Name of facility	Walking distance from site	Map Ref	Name of facility	Walking distance from site
C1	Guardian Childcare & Education Cherrybrook	270m	C12	Cherrybrook OOSH Care Inc	2km
C2	Kindalin Early Childhood Learning Centre West Pennant Hills	40m	A1	West Pennant Hills Sports Club	1.9km
C3	Eurambie Park Child Care Centre	1.3km	A2	West Pennant Hills Valley Community Hall	1.5km
C4	Cherrybrook Community Pre-school Inc	2.2km	A3	Gumnut Community Centre	2.2km
C5	Sun Valley Preschool Kindergarten	1.5km	A4	Cherrybrook Community and Cultural Centre	2.6km
C6	Cherrybrook Preschool Kindergarten	1.6km	L1	Castle Hill Library	2.9km
C7	Adventures Preschool and Long Day Care	1.8km	H1	Oakhill College	2.5km
C8	Binnowee kindergarten Co-Op Society Ltd.	1.8km	H2	Cherrybrook Technology High School	2.5km
C9	Life Skills Centre for Kids Cherrybrook	1.9km	P1	John Purchase Public School	2.8km
C10	Kindalin Early Childhood Learning Centres Cherrybrook	1.1km	P2	St Bernadette's Primary School	2km
C11	Heritage House Cherrybrook Childcare & Early Learning Centre	1.8 km	P3	West Pennant Hills Public School	2.2km
			P4	Cherrybrook Public School	2km
			S1	Tangara School for Girls	550m

Figure 5 Audit of existing community facilities with 2km of the State Significant Precinct

Source: Cred Consulting

3.3 Policy context

The following section identifies the key social and housing drivers for this site, based on a review of the key state and local policies and strategies. These are summarised at **Table 1** over page.

As the study area for this Housing Study is split between Hornsby Shire and the Hills Shire LGAs, and the Central and North Districts, a broad range of policies and strategies have been reviewed to inform this assessment:

- *Central City District Plan* (Greater Sydney Commission 2018)
- *North District Plan* (Greater Sydney Commission 2018)
- *Cherrybrook Structure Plan* (Transport for New South Wales & Department of Planning Industry and Environment 2020);
- *Hornsby Local Strategic Planning Statement* (Hornsby Shire Council 2020)
- *Community Strategic Plan 2018-2028* (Hornsby Shire Council 2018)
- *Affordable Housing Discussion Paper* (Hornsby Shire Council 2018)
- *Local Housing Strategy – Exhibition Draft* (Hornsby Shire Council 2020)
- *Hills Future 2036 - Local Strategic Planning Statement* (The Hills Shire Council 2020)
- *The Hills Future Community Strategic Plan 2017-2021* (The Hills Shire Council 2017)
- *The Hills Shire Council Housing Strategy 2019* (The Hills Shire Council 2019)
- *The Hills Shire Productivity and Centres Strategy* (The Hills Shire Council 2019)
- *Landcom Strategic Directions* (Landcom 2017)
- *Landcom Housing Affordability and Diversity Policy* (Landcom 2019).

A comprehensive review of the strategic policy context for the precinct is available at **Appendix A**.

Table 1 Key social and economic policy drivers for the precinct

Key theme	Drivers for the precinct
Population growth and the “30-minute city”	<ul style="list-style-type: none"> • Located across the Central City and North Districts of Greater Sydney, the Cherrybrook SSP is currently being rezoned for significant population growth and will be transformed into a local centre, focused on the station. Town centres play a key role in meeting the goods and service needs of their communities while delivering social and economic benefits, and it is a state and local priority to deliver a “30 minute city” where daily living needs, employment and education opportunities, and housing are accessible to each other. • To support population growth, it is a key state priority to deliver new, diverse and affordable housing options in locations well supported by infrastructure and public transport.
Enhancing housing affordability and diversity	<ul style="list-style-type: none"> • It is a state and local priority to increase housing supply, choice and affordability in areas close to jobs, services and public transport, to support population growth and demand for more diverse housing types. Coordinating housing supply with local infrastructure delivery aims to create liveable, walkable neighbourhoods. • Housing supply needs to respond to the community profile of the area, including different household types and preferences. Providing dwellings at a range of sizes, price points and tenure types supports community wellbeing by ensuring housing is affordable and meets household needs and preferences. Consideration of higher density housing options for families, seniors and aged care housing, student accommodation, group homes, boarding housing and affordable rental housing will also be required to diversify housing supply. • It is a local priority to balance demand for increased housing with preserving local character and the natural environment. • Analysis undertaken by Hornsby Shire Council has identified that across the Shire there are existing gaps in housing diversity, with a lack of smaller studio and one-bedroom units, medium density housing and affordable rental housing. • Hornsby Shire Council has identified that government owned land around Cherrybrook Station will play an important role in meeting demand for diverse, well-connected housing across the Shire. • Increasing housing diversity and affordability are key goals of Landcom, which aims to “deliver city shaping projects that are more affordable, vibrant, connected and sustainable places to live.”
Demand for housing in Cherrybrook	<ul style="list-style-type: none"> • Due to high levels of transport accessibility, there is high forecast demand for housing within Cherrybrook, which would enable future residents to access social, recreational and employment opportunities via the Metro. • The vision for this precinct is to deliver mixed use development within walking distance of Cherrybrook Station that provides a range of residential, commercial, open space and community facilities well connected via active transport links and public transport.
Liveability and social sustainability in the Hills and Hornsby LGAs	<ul style="list-style-type: none"> • Population growth, high density urban renewal and an increasingly diverse resident and worker community are placing pressure on the existing infrastructure across the Hills Shire LGA and Hornsby LGA. • Increased provision of social infrastructure is needed across the Central City and North District to service the diverse communities that live in the north west region of Sydney. Future social infrastructure planning in the area should adopt a networked approach, be multi-functional, safe and secure and welcoming to all members of the community. • Future development should also provide residents with great lifestyles, and access to high quality places that reflect local character.

4.0 Housing needs analysis

The housing needs analysis that underpins this report was completed in 2020, since then the housing market is at a different point in the cycle. Similarly, the effects of COVID-19 and associated policy responses have had an impact on the economy but the overall magnitude of this impact and its long term implications on the housing market remain uncertain. In particular, the economy has been supported by unprecedented government policy and has shown a significant degree of resilience and ability to 'bounce back' following the economic shocks associated with COVID-19.

In this report, the focus of the research and analysis has been on long term market and demographic trends, which 'look through' short term fluctuations in economic variables and market cycles. Short term housing market cycles will lead to fluctuations in headline figures such as prices, approvals, vacancies, and may bring forward or delay the timing of certain projects; however, are not expected to fundamentally change long term demographic and housing market trends which inform the recommendations of this report.

The following section analyses current and forecast housing supply and demand conditions within the Study Area:

- Supply is considered in terms including dwelling types within the Study Area, building approvals and completions.
- Demand is understood in relation to demand factors, such as current and future population and age structure and average household size; this data is then used to inform the potential scale of demand and demand by dwelling type.

The methodology that underpins this section is focused on long term market and demographic trends. In particular, how the housing market has changed over the last decade and between the two most recent census periods of 2011 and 2016. In addition, it focuses on how the market is likely to change over the next 15 or so years into the future. It is necessary to focus on long term trends rather than market cycles and other short term impacts, as these long term trends will assist in identifying the principles and recommendations for the delivery of housing supply through the SSP planning process.

4.1 Supply

4.1.1 Dwelling type

At the 2016 National Census of Population and Housing, dwelling stock in the Study Area comprised approximately 93% as separate houses and the remainder (7%) as semi-detached housing. No stock of flats, units or apartments was recorded (see **Table 2** over page).

The composition of dwelling types in the Study Area is typical for areas such as Cherrybrook, which were suburbanised as part of the then urban fringe of Greater Sydney with limited or no access to fixed rail public transport infrastructure. As areas gained access to public transport, and as the urban fringe shifted further north and west, market forces and planning land use regulations lead to increases in the stock of semi-detached and flat, unit and apartment dwelling types. Cherrybrook however, remained a location dominated by detached housing stock.

A comparison between the composition of dwelling stock in the Hornsby Shire and the Hills Shire illustrates this point. Areas of Hornsby Shire have better access to public transport and are further removed from the development front, whereas until recently areas of the Hills Shire lacked access to good public transport, and had land use patterns characteristic of being on or near to the urban fringe. As such, there is a lower share of separate houses in Hornsby Shire (74%) compared to the Hills Shire (83%); and a greater share of flats, units and apartments in Hornsby Shire (28%) compared to the Hills Shire (14%).

Between 2011 and 2016, the composition of dwelling stock in the Study Area has remained relatively unchanged, with a slight increase in the share of separate houses. This lack of change is due to the Study Area reaching its current yield capacity under existing planning controls with limited sites available for redevelopment.

In contrast, both the Hills Shire and Hornsby Shire have experienced significant dwelling growth and changes in the composition of dwelling stock. Hornsby LGA has seen a decrease in the number of separate houses, and an increase in semi-detached and flat, unit and apartments. The Hills Shire has also experienced a similar change in

the composition of its dwelling stock, but the number of separate houses has continued to increase due to areas of the Hills Shire being in the North West Growth Area.

Looking forward, it is likely that the trend towards the accommodation of higher proportions of non-detached housing will accelerate across much of Greater Sydney. If the opportunity is provided, future developments in the Study Area will likely see a reduction in the number of separate houses and an increase in semi-detached and flats, units and apartments.

Table 2 Change in dwelling type, 2011-2016

Dwelling Structure (Occupied Private Dwellings)	2011		2016		Change	
Study Area	No,	%	No.	%	No,	%
Separate house	1,120	90%	1,140	93%	+20	+4 ppt
Semi-detached, row or terrace house, townhouse etc.	130	10%	80	7%	-40	-3 ppt
Flat, unit or apartment	0	0%	0	0%	+0	-0 ppt
Hills Shire						
Separate house	37,780	85%	39,400	83%	+1,620	-3 ppt
Semi-detached, row or terrace house, townhouse etc.	4,450	10%	5,590	12%	+1,140	+2 ppt
Flat, unit or apartment	1,950	4%	2,600	6%	+650	+1 ppt
Hornsby Shire						
Separate house	35,090	76%	34,520	74%	-570	-3 ppt
Semi-detached, row or terrace house, townhouse etc.	3,660	8%	4,050	9%	+390	+1 ppt
Flat, unit or apartment	7,130	16%	8,120	17%	+990	+2 ppt
Greater Sydney						
Separate house	926,030	61%	923,970	57%	-2,060	-4 ppt
Semi-detached, row or terrace house, townhouse etc.	194,190	13%	226,480	14%	+32,290	+1 ppt
Flat, unit or apartment	391,950	26%	455,650	28%	+63,690	+2 ppt

Source: ABS, 2011; ABS, 2016; Ethos Urban

Notes: figures rounded

4.2 Tenure

In 2016, 87.2% of dwellings in the Study Area were either owned outright or with a mortgage, while 12.6% of dwellings were rented.

Ownership in the Study Area was significantly higher than in the Hills Shire and Hornsby Shire, and in Greater Sydney, reflecting a level of relative economic affluence within the Study Area. The relatively high share of dwellings owned outright indicates that households are well established. The low share of rentals could indicate lack of dwelling stock suitable for renting.

Table 3 Tenure type, 2016

Tenure Type	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
Owned outright	41.7%	35.1%	36.2%	30.0%
Owned with a mortgage	45.5%	46.6%	40.4%	34.2%
Rented	12.6%	17.4%	21.7%	35.1%
Other tenure type	0.2%	0.8%	1.8%	0.7%

Source: ABS

4.2.1 Building approvals

A review of recent trends in building approvals provides insights into the potential future supply of dwellings within the Study Area, and can also provide insights into market interest within the area.

Building approvals in the Study Area have been limited, with a total of 18 building approvals between 2011/12 to 2018/19 with all approvals being for separate houses (see **Table 4** over page). It is probable these approvals relate to the replacement of existing stock. As noted above, this low number of approvals reflects land use constraints rather than lack of market demand, with the Study Area at, or close to, its yield capacity under current planning controls.

Over the same period (2011/12 to 2018/19), new dwelling building approvals in the Hills Shire (20,340 dwellings) have been approximately twice the number of those recorded in Hornsby Shire (10,200 dwellings). There was an annual average of 2,540 building approvals in the Hills Shire and an annual average of 1,280 building approvals in Hornsby Shire.

In the Hills Shire, 54.8% of building approvals were for units, while in Hornsby Shire the proportion was higher at 78.7%. This is consistent with the stage of development that both LGAs are currently at. Going forward, it is likely that the share of units in the Hills Shire will continue to steadily increase but will remain at a level below that of Hornsby Shire due to the significant capacity for greenfield development within the Hills Shire.

Building approvals have remained relatively stable in the Hills Shire, but peaked in 2016/17 and 2017/18. In contrast, building approvals in Hornsby Shire peaked in 2015/16 before decreasing.

Table 4 New building approvals, 2011/12 -2018/19

Year	Study Area			Hills Shire			Hornsby Shire		
	House	Unit	Total	House	Unit	Total	House	Unit	Total
2011/12	3	0	0	440	1,320	1,760	60	330	390
2012/13	3	0	3	610	630	1,240	200	360	560
2013/14	1	0	1	990	1,060	2,050	90	1,080	1,170
2014/15	5	0	5	1,080	1,990	3,060	130	1,780	1,910
2015/16	5	0	5	1,170	1,250	2,420	250	3,030	3,270
2016/17	0	0	0	1,600	2,070	3,670	340	880	1,220
2017/18	1	0	1	1,780	1,850	3,630	270	770	1,050
2018/19	0	0	0	1,590	930	2,510	270	360	630
Total	18	0	15	9,260	11,100	20,340	1,610	8,590	10,200
Average Annual Growth	2	0	2	1,160	1,390	2,540	200	1070	1,280

Source: ABS; Department of Planning; Ethos Urban

Notes: figures rounded

It is noted that a limitation of building approvals data is that not all building approvals translate to actual housing completions, with housing completions determining actual housing stock.

An examination of the share of unit completions in the Hills Shire and Hornsby Shire shows that over the same period approximately 11,180 dwellings were completed in Hills Shire and 4,640 dwellings were completed in Hornsby Shire. On average, 1,400 dwellings were constructed each year in the Hills Shire and 580 dwellings in Hornsby Shire.

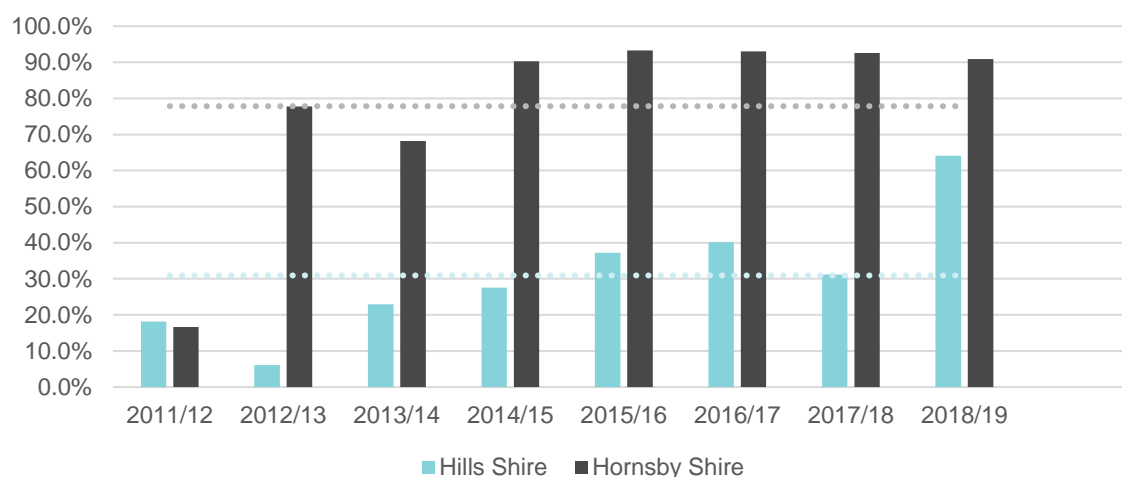


Figure 6 Share of unit completions, 2011/12-2018/19

Source: NSW DPE; Ethos Urban

The share of units completed indicates that unit completions have been steadily increasing in the Hills Shire, and account for an average of 30.9% of all dwellings completed over the period (**Figure 6**). In the Hornsby Shire the share of unit approvals has been relatively stable at an average of 77.8% over the period, with recent years proving to be particularly strong.

In comparing building approvals to building completions, there appears to be a significant number of dwellings potentially remaining in the pipeline; in the order of 1,000 for Hills Shire and 600 for Hornsby Shire, with the majority of these dwellings being units.

A review of residential building activity in the Study Area, Hills Shire and Hornsby Shire has found the following:

- There has been a significant level of residential building activity within the Hills Shire and Hornsby Shire, which is also an indication of strong demand within these areas.
- Low building approvals in the Study Area reflects the fully developed nature of the area, which is at its yield capacity. This low rate of building approvals is not considered to represent a reflection of weak demand.
- There has been a shift towards higher density living in Hills Shire and Hornsby Shire through the delivery of medium and high density units over the last five years.

4.3 Demand

4.3.1 Age structure and population growth

Between 2011 and 2016, the median age of the Study Area increased from 39.0 years to 40.7 years. A similar increase was observed for the other study areas and is consistent with Australia's aging population.

An examination of the age groups for comparable study areas indicates that the increase in the median age for all the study areas is being driven by increases in the share of residents aged 65 to 84 year age group and declines in the share of residents aged 35 to 64 years and 0 to 4 years (see **Figure 7** over page).

The Study Area has also experienced a noticeable decline in persons aged 5 to 19 years, which reflects the mature and stable nature of the local market with residential long term home ownership (in which a growing number of households may have had children who have now moved out).

Looking forward, this trend towards an aging population is expected to continue and will lead to a decline in couple households with children as residents aged 20 to 34 years look to move out of the family house. However, it is expected that higher density forms of housing development in the Study Area could attract a younger age cohort to the area, including young professionals. This may see the Study Area's age profile stabilise.

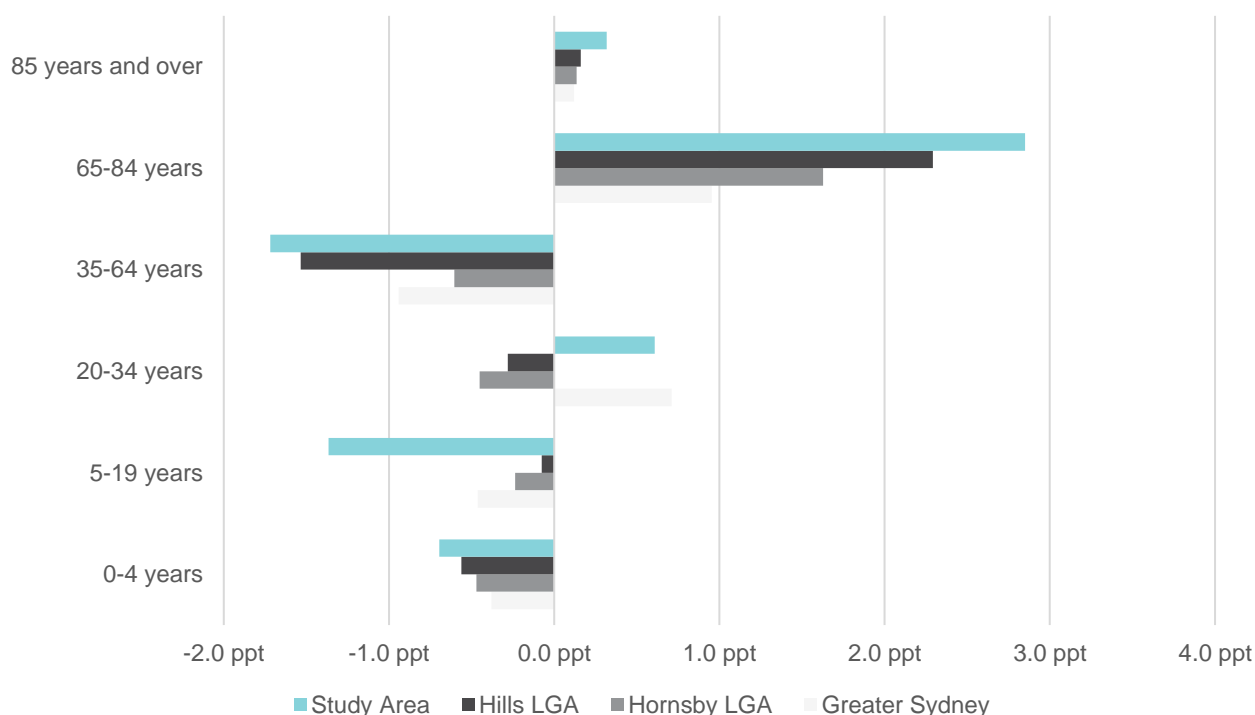


Figure 7 Change in age structure between 2011 and 2016

Source: ABS; Ethos Urban

Between 2011 and 2016, the population of the Study Area declined by 110 persons to 4,340 residents. This represented at an average annual rate of -0.5% (see **Table 5**). A further decline in population is estimated to have occurred between 2016 and 2020. For the period 2011 to 2020, the population is estimated to have declined by an average of 20 persons each year. This decline has been most likely driven by the lack of additional housing stock in the Study Area combined with an aging population.

Based on Transport for NSW population projections and internal modelling, the population of the Study Area is expected to increase to 12,230 residents by 2036, an increase of 7,970 residents from 2020.⁵ Most of this population growth is expected to occur after 2026, when the population is expected to grow at an average of +765 residents per year.

Driving this population growth are assumptions around major supply opportunities and the timing of new dwelling supply. Given the current economic outlook and population growth in a COVID-19 environment, residential activity is considered likely to remain relatively subdued for several years, before increasing towards from approximately 2024/2025.

As such, new dwelling supply is expected to be limited for the next two to three years in the Study Area. However, strong demand to live in the Study Area, combined with an improved economic outlook and the availability of actual supply is expected to see a significant increase in residential activity from 2026, when the Study Area is expected to absorb the remainder of the 3,200 proposed dwellings.

⁵ Population projections have been derived using Transport for NSW projections as a basis but have been adjusted downwards to account for expected lower population growth over the 2020 to 2026 period, while adjusted upwards to account the strong demand to live in the Study Area being accommodated by 3,200 dwellings.

Table 5 Population profile, 2011-2036

Population	2011	2016	2020	2026	2031	2036
Population	4,450	4,340	4,260	5,580	7,740	12,230
Growth Rate		-0.5%	-0.5%	1.2%	11.1%	9.6%%
Average Annual Growth		-20	-20	+50	+630	+900

Source: TfNSW; Ethos Urban

Notes: figures rounded

4.3.2 Household type and size

The Study Area is considered an attractive place to live. In 2016, the majority of households in the Study Area were family households, and of these the majority of these family types were couple family with children. The Hills Shire had similar shares of family households to Hornsby Shire and Greater Sydney, and suggests that the broader region is an attractive place for families households. The proportion of Lone person and Group households was relatively low in the Study Area.

In the future, the proportion of family households is expected to decline, driven partly by an aging population and children leaving the family home. This is consistent with established trends already underway in the Study Area. Additionally, changes in the type of dwellings provided in the Study Area, with a substantial increase in the medium and higher-density forms of housing is also expected to accelerate current trends.

Table 6 Household composition (2016)

Household Composition	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
<i>Couple family with no children</i>	25.6%	23.5%	24.0%	23.8%
<i>Couple family with children</i>	59.8%	54.6%	46.9%	37.5%
Couple family - Total	85.4%	78.2%	70.9%	61.3%
One parent family	7.2%	8.5%	9.1%	11.1%
Other families	0.6%	0.6%	0.8%	1.3%
Family Households - Total	93.2%	87.2%	80.8%	73.7%
Lone person household	6.1%	11.4%	17.4%	21.7%
Group Household	0.7%	1.3%	1.8%	4.6%

Source: ABS; Ethos Urban

In 2016, the average household size of households in the Study Area was 3.3 persons per dwelling. This figure was slightly higher than the Hills Shire (3.2) and considerable higher than the figure for Hornsby Shire (2.9) and Greater Sydney (2.8). Driving the higher average household size in the Study Area is the existing dwelling stock with the average household size of detached houses typically greater than other dwelling types, particularly, flats, units and apartments. For example, in Greater Sydney the average household size is 3.1 in separate houses and 2.2 in flats, units and apartments.

Table 7 Household sizes, Study Area, 2016

Average household size	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
Average household size	3.3	3.2	2.9	2.8
<i>Av. Household size - Separate house</i>	3.3	3.3	3.1	3.1
<i>Av. Household size - Semi-detached, row or terrace house, townhouse etc.</i>	3.1	2.7	2.5	2.6
<i>Av. Household size - Flat, unit or apartment</i>	N/A	2.2	2.2	2.2

Source: ABS; Ethos Urban

4.4 Market activity

The potential for a higher density residential market in the Study Area will be informed by trends at a wider level including the further intensification of development in nearby centres such as Castle Hill and other metro station precincts. This is typical of development in Australia's major metropolitan areas whereby the viability of high-density residential markets moves incrementally outwards from a central city core and gravitates to locations proximate to public transport infrastructure.

The housing market in the Study Area, as well as the broader area, has enjoyed historic strong performance. Median house prices in the Study Area, the Hills Shire and Hornsby Shire indicate strong demand for housing. In 2019/20, the suburbs of Cherrybrook and West Pennant Hills, which encompass parts of the Study Area recorded a median house price of \$1.4 million and \$1.5 million respectively, well above the median house price of \$920,000 for Greater Sydney.

Research undertaken by Ethos Urban, indicates that in Australia's major urban markets, there is a link between the selling price of new residential apartments and the median house price of the surrounding area. The link reflects the choice confronting home buyers in which most home buyers will select a house on a discrete parcel of land over an apartment if the buying price is relatively similar. This does not just reflect the choice of the homebuyer but is also driven by the lending criteria of financial institutions where ownership of land is considered to provide greater underlying security than ownership of air rights.

The research suggests that as the gap widens between the price of an average new apartment and the median house price of the surrounding area, the depth of the higher-density residential market in the same area increases. Typically, it is considered that if the selling price of an average new two-bedroom apartment is at least 25% below that of the median house price of the surrounding area – and preferably closer to 40% - a high-density residential apartment market of significant depth should exist.

A comparison of the median house price in Castle Hill, which represents the surrounding area and recent high density apartment completions in nearby Castle Hill provides a point of relevant reference. The median house price in Castle Hill in 2019/20 was \$1.4 million.

A review of current and recent apartment product in Castle Hill indicates that new two-bedroom apartment product is available at approximately \$850,000. (two-bedroom, two-bathroom, one car space apartment).

This represents an apartment to median house price ratio of 0.61 (i.e. the apartment price is 61% of the median house price). On face value, this indicates that a high-density apartment market is likely to be at, or around, the price range required to support a significant high-density apartment market. The presence of the Cherrybrook Station adjacent to a high-density precinct at Cherrybrook is likely to add further weight to Cherrybrook as an attractive high density market.

Separately, it is noticeable that in other areas that have been provided with rail-based public transport infrastructure, demand for higher-density forms of housing has been significant. In the case of Cherrybrook, the provision of new high-capacity and high-frequency rail-based public transport infrastructure at a best practice (for Australia) level is considered almost certain to prove popular with both home buyers and the rental market.

Table 8 Median house price, 2006/7-2019/20

	Cherrybrook	West Pennant Hills	Castle Hill	Hills Shire	Hornsby Shire
2006/7	\$620,000	\$660,000	\$600,000	\$550,000	\$580,000
2007/8	\$616,500	\$723,500	\$650,000	\$580,000	\$585,000
2008/9	\$670,500	\$775,000	\$665,000	\$610,000	\$640,500
2009/10	\$652,500	\$734,750	\$656,250	\$599,000	\$625,000
2010/11	\$725,000	\$780,000	\$732,000	\$675,000	\$712,000
2011/12	\$755,000	\$870,000	\$768,000	\$695,000	\$740,000
2012/13	\$755,000	\$870,000	\$759,000	\$676,725	\$742,003
2013/14	\$800,000	\$946,500	\$820,000	\$740,000	\$770,000
2014/15	\$953,000	\$1,070,000	\$980,000	\$867,500	\$909,000
2015/16	\$1,200,000	\$1,320,000	\$1,253,000	\$1,050,000	\$1,101,000
2016/17	\$1,370,000	\$1,500,000	\$1,360,000	\$1,180,000	\$1,230,000
2017/18	\$1,517,500	\$1,650,000	\$1,547,500	\$1,265,000	\$1,386,000
2018/19	\$1,500,000	\$1,670,000	\$1,570,000	\$1,280,000	\$1,380,000
2019/20	\$1,390,000	\$1,480,000	\$1,350,000	\$1,150,000	\$1,180,000
5 year AAGR*	3.0%	2.3%	1.5%	1.8%	1.4%

Source: Pricerfinder (2020)

Note: * Average Annual Growth Rate

5.0 Key findings and conclusions

- The demographic profile of Cherrybrook (the Study Area) is that of a family-based suburb with detached housing as the predominant built form.
- As the population ages, the Study Area is gradually declining in population and a growing number of households are Couple Families without Children.
- A significant contributor to the Study Area's current age profile and urban composition is that it is fully built out and the planning scheme presently provides little scope for different housing typologies such as medium and higher density housing.
- Within this urban profile, the Cherrybrook Station and the immediate area around the station represents an opportunity to provide housing diversity that has, to date, been absent from the local market. In addition, it will provide a more diverse housing typology to the Study Area, which will attract a younger and more diverse demographic. In turn, this is likely to slow the rate of aging in the Study Area
- It is noticeable that in other areas that have been provided with rail-based public transport infrastructure, demand for higher-density forms of housing has been significant. In the case of Cherrybrook, the provision of new high-capacity and high-frequency rail-based public transport infrastructure at a best practice (for Australia) level is considered almost certain to prove popular with both home buyers and the rental market.
- Additionally, the median house price in Cherrybrook (\$1.4 million in 2019/20) suggests that the future high-density apartment market is likely to be at, or around, the price range required to support a significant high-density apartment market compared to median price of houses within the local area.

The presence of the Cherrybrook Station adjacent to a high density precinct at Cherrybrook is likely to add further weight to Cherrybrook as an attractive high density market. This is demonstrated by previous research which points to a strong link between the median house price of the surrounding area and the commercial viability of undertaking higher density residential development.

In summary, existing planning controls have prevented the development of a higher-density residential market in Cherrybrook. The opportunity to provide such a market around the Cherrybrook Station is considered likely to be strongly supported due to its access to high-frequency rail-based public transport and the relatively high-median house price of the surrounding area.

6.0 Recommendations

The following section draws on the analysis of geographic and socio-economic context, policy drivers and housing needs analysis to identify principles and recommendations for the delivery of housing supply through the SSP planning process.

6.1 Principles to guide housing supply delivery in the Cherrybrook Station Precinct

The following principles are suggested to guide future planning of new housing supply in the precinct:

- **Diversity:** Diverse housing ensures that there are housing options for a broad range of households in Cherrybrook Station Precinct, to maximise choice and ensure that households can access housing that meets their needs and preferences.
- **Affordability:** Affordable housing (both provision of affordable rental housing and general housing affordability) supports the wellbeing of individuals and households by ensuring that they can access secure, stable housing without spending a disproportionate share of their income towards housing.
- **Liveability and wellbeing:** Housing in the Cherrybrook Station Precinct will be of a high quality, situated in a precinct with high levels of amenity to support community liveability and wellbeing.
- **Connectivity:** Housing in the Cherrybrook Station Precinct will be well connected to high capacity, high frequency public transport (i.e. Sydney Metro), and will contribute towards achieving the Greater Sydney Commission's vision of a "30-minute city," where employment, education and social infrastructure is within 30 minutes travel by public transport.
- **Accessibility:** Housing in this precinct will be accessible to social and economic infrastructure, employment opportunities, daily living needs (e.g. retail shops, restaurants and cafes) to support quality of life and wellbeing for residents of the Cherrybrook Station Precinct.
- **Resilience:** Housing delivered in the Cherrybrook Station Precinct will be responsive to environmental issues (e.g. urban heat, extreme weather) so residents and communities will be safe and comfortable in their homes, and are able to connect with services and each other, to support community resilience.

6.2 Recommendations on housing mix – including supply and diversity

Cherrybrook Station Precinct represents a unique opportunity along the Metro North West Line, as the only non-greenfield site not centred on an established centre. As an established low density housing area, the Cherrybrook SSP offers significant scope for urban renewal, placemaking and opportunities for innovation.

Housing market drivers may also indicate the potential for delivery of a premium housing product on the site – providing a high level of design quality, sustainability and amenity – given the current lack of high density housing options in the Study Area and the site's location around the new Cherrybrook Station, providing a convenient new, high quality and high speed public transport link to a range of employment and recreation centres, which will likely appeal to a range of household types.

Table 9 over page provides a suite of recommendations on the future housing mix in the Cherrybrook SSP, including the supply, type and tenure appropriate to meet community needs and aspirations in the area of envisaged market demand, as well as recommendations to inform design and planning mechanisms to deliver the desired outcomes identified in this study.

6.3 Recommendations on delivering affordable rental housing supply

Affordable rental housing supports the wellbeing of individuals and households by ensuring that they can access secure, stable housing without spending a disproportionate share of their income towards housing. **Table 10** on page 30 provides recommendations to inform the delivery of affordable rental housing in the Cherrybrook SSP.

Table 9 Housing diversity recommendations for the Cherrybrook SSP

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism
Increase housing choice in the Cherrybrook SSP by delivering high density housing options	Cherrybrook is an established low density area. In the study area, 93.4% of dwellings are separate houses, and there are no flats, units or apartments. Urban renewal in this area offers an opportunity to diversify the range of housing types in the area to meet a broader range of community needs, including unmet demand for smaller dwellings from lone person and couple households, as per the draft <i>Hornsby Shire Council Local Housing Strategy</i> (2020).	<ul style="list-style-type: none"> Consider delivery of high density housing at a mix of scales, sizes and bedroom mixes within walking distance of Cherrybrook Station. Apply principles of transit oriented development to deliver housing opportunities in close proximity to high frequency, high capacity public transport. 	<ul style="list-style-type: none"> Ensure that proposed zoning enables high density residential development. Outline objectives to encourage high density housing and town centre character within the Design Guide. Ensure that residential development in the Cherrybrook SSP complies with SEPP 65 (Apartment Design Guide), as per legislative requirements.
Deliver high density housing for a range of household types	<p>The site's highly accessible and connected location indicates that high density housing in this location would be attractive to a range of household types, including young families, couples, older people and lone person households.</p> <p>The existing household profile of the area is dominated by family households, and rezoning of the Cherrybrook SSP provides an opportunity to support the needs of a broader range of households. 93.2% of households in the study area are couples, with or without children, compared with 61.3% of households across Greater Sydney. Only 6.1% of households in the study area currently are lone person households, compared with 21.7% across Greater Sydney.</p>	<ul style="list-style-type: none"> Consider delivery of high density housing of a mix of scales, sizes and bedroom mixes within walking distance of Cherrybrook Station. Consider delivering a walkable precinct, well-connected to public transport to reduce need to provide high levels of car parking to support housing in the Cherrybrook SSP. 	<ul style="list-style-type: none"> Consider inclusion of apartment typology mix in the Design Guide, responsive to market demand at time of development.
Deliver three-bedroom apartments appropriate for family households with children, downsizers, and multi-generational housing	<p>The current household profile of this area is dominated by family households, and the average household size in the study area is 3.3 persons per dwelling, compared with 2.8 across Greater Sydney. This indicates demand for larger dwellings, which is currently only being met through separate houses.</p> <p>Three-bedroom apartments in this highly accessible location may be appealing to family households, as they will be more affordable compared to detached</p>	<ul style="list-style-type: none"> Consider opportunities to deliver larger apartments on the ground floor of apartment buildings, attached to a garden or private outdoor space. Consider access to play spaces and open space and facilities (e.g., child care centres, schools) to support needs of children and their families in the area. 	<ul style="list-style-type: none"> Consider inclusion of a control to deliver three bedroom apartments within Design Guide through the rezoning process. Consider including controls within the Design Guide to encourage delivery of family friendly apartments and design outcomes within residential flat buildings, subject to market demand at the time of development. This may

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism
	<p>housing, and are more accessible to public transport and employment opportunities in surrounding centres.</p> <p>Larger units of this size may also appeal to downsizers in the Hornsby and Hills Shire LGAs, given there are currently limited options for them in terms of highly accessible, high quality, density housing stock.</p> <p>Larger housing (i.e., three-bedroom units) in this location may also support multi-generational households (e.g. families where grandparents live with two working parents to care for children). As the Cherrybrook SSP is highly culturally diverse, with a high proportion of residents speaking Mandarin (9.8%) and Cantonese (7.6%) at home, this profile may indicate demand for multi-generational housing.</p>		include provision of larger bedroom sizes, private open spaces at ground floor, study spaces, storage, minimum of two bathrooms.
Deliver adaptable housing to provide opportunities for downsizing and ageing in place	<p>While noting this is a matter of preference, there may be older people in the broader area who are seeking opportunities to downsize into a smaller, more easily maintained dwelling close to existing connections in Cherrybrook.</p> <p>The age profile of the study area is older than the Greater Sydney average, which indicates a concentration of older people living in the area. The median age in the study area is 40.7 years, compared with 36.4 years in Greater Sydney, and the proportion of people in the study area aged 65 years and over increased by 3.17% between 2011 and 2016.</p>	<ul style="list-style-type: none"> Incorporate design elements within the masterplan that will support the needs of older people in the area, including provision of seating, canopy cover to provide shade and cooling of the streets, walkable access to local shops. 	<ul style="list-style-type: none"> Consider including a target in the Design Guide for implementation of universal design, to support adaptability and opportunities for residents to age in place (e.g., larger corridor widths and bathroom size to enable installation of guard rails). Include objectives and controls within the Design Guide to encourage design outcomes such as provision of tree canopy cover, seating, pedestrian connectivity etc.
Delivering some smaller apartments appropriate for lone person households and first home buyer couples	<p>The dominance of separate housing (93.4% of all dwellings in 2016) and the relatively high median house price in the study area (\$1.4 million in 2019-20, compared with \$920,000 in Greater Sydney) may indicate unmet demand for smaller housing types in the area, which are appropriate for lone</p>	<ul style="list-style-type: none"> Deliver retail, social infrastructure and entertainment opportunities within the broader Cherrybrook SSP to support daily living needs of residents and encourage social interaction and community connection. 	<ul style="list-style-type: none"> Consider inclusion of a site-specific provision within LEP through the rezoning process, to deliver a target range of one and two-bedroom apartments. Ensure that residential development in the Cherrybrook SSP complies with

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism
	person households and couples, to support a broader range of household types in the area.	<ul style="list-style-type: none"> Consider delivery of communal spaces in apartment buildings to support socialising between residents e.g., community rooms, music rooms, shared rooftops. 	SEPP 65 (Apartment Design Guide), as per legislative requirements.
Meet demand for housing with high design quality	<p>Due to the highly accessible location of the site (adjacent to Cherrybrook Station) and the existing high median house price in Cherrybrook (\$1.4 million in 2019-20), there is likely demand for high quality apartment stock in the Cherrybrook SSP.</p> <p>High quality apartments that have been delivered in Castle Hill and other comparable centres have been taken up by buyers.</p>	<ul style="list-style-type: none"> Encourage high quality of architectural design in the overall Cherrybrook SSP precinct that positively contributes toward the surroundings. 	<ul style="list-style-type: none"> Ensure that residential development in the Cherrybrook SSP complies with SEPP 65 (Apartment Design Guide). Consider implementation of a design excellence framework or design advisory panel, in collaboration with Hornsby Shire Council, to encourage higher standards of design quality.
<p>Deliver a liveable neighbourhood with social infrastructure, retail and other services and amenities to meet residents' daily living needs</p> <p>Deliver great public open spaces to support increased density and population growth</p>	<p>To support increased housing in the Cherrybrook SSP, and realise the goal of a vibrant and thriving centre, it will be important to ensure that new housing in the area is supported by adequate levels of amenity that caters to a broad range of demographic groups.</p> <p>The existing housing profile of the area is dominated by separate houses, and increased housing diversity is likely to attract a broader range of household types, including lone person households, down sizers and young couples. The broader neighbourhood will need to be designed to support this diversity.</p>	<ul style="list-style-type: none"> Implement recommendations of the Cherrybrook Station Government Land State Significant Precinct Social Infrastructure Needs Assessment (Cred Consulting, July 2020) as part of the masterplan. Ensure that the masterplan delivers walkable access from housing to public transport, social infrastructure, neighbourhood shops, employment opportunities and recreation opportunities. 	<ul style="list-style-type: none"> Include objectives and controls within the Design Guide to encourage liveable neighbourhoods and local infrastructure such as open space, retail activation etc.
Deliver housing that is sustainable and resilient to climate change	<p>Housing delivered in the Cherrybrook SSP will be responsive to environmental issues (e.g., urban heat, extreme weather) so residents and communities will be safe and comfortable in their homes, and are able to connect with services and each other, to support community resilience.</p> <p>Sustainably designed and built housing in this area will also reduce ongoing maintenance and utilities costs for residents. For example, incorporating water saving measures, passive ventilation, shading, appropriate insulation will reduce housing</p>	<ul style="list-style-type: none"> Explore opportunities to deliver a resilient and sustainable community at precinct scale, e.g., through water sensitive urban design elements, expanded tree canopy, active transport links. Implement recommendations of Cherrybrook Station Government Land State Significant Precinct Sustainability Plan and Climate Change Adaption Report. 	<ul style="list-style-type: none"> Ensure residential development aligns with requirements of BASIX, and considers opportunities to deliver residential development that aligns with precinct-specific water and energy efficiency targets. Include controls within the Design Guide to ensure sustainable and resilient development.

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism
	costs and contribute towards the overall affordability of housing.		
Deliver housing that is responsive to the bushland character of the area	<p>The geographic context of the study area, in a suburban area with access to the natural areas, shade, urban forest and views of the surrounding bushland landscape, is strongly valued by the community.</p> <p>Housing that is consistent with this existing place character and engages with the natural landscape is likely to align with community values.</p>	<ul style="list-style-type: none"> Consider opportunity to provide visual connections and walking connections between housing in the Cherrybrook SSP and surrounding bushland. Ensure that masterplan reflects local community values related to bushland, natural landscape and access to nature. 	<ul style="list-style-type: none"> Consider development of tree canopy targets / protection, as well as targets for planting of urban vegetation.

Table 10 Recommendations for affordable housing delivery in the Cherrybrook SSP

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism (for discussion)
Deliver affordable rental housing within the Cherrybrook Station Precinct	<p>The rezoning of government-owned land in the Cherrybrook SSP provides an excellent opportunity to deliver new affordable rental housing, as per the NSW Government's affordable housing target of 5-10% of new development (subject to feasibility)⁶, in area well connected to public transport and employment opportunities in surrounding centres.</p> <p>As this land is government-owned, there is a significant opportunity to deliver improved access to affordable housing in this area.</p>	<ul style="list-style-type: none"> Deliver a liveable community with access to employment opportunities, social infrastructure, public transport and daily living needs to support quality of life for residents of affordable rental housing. 	<ul style="list-style-type: none"> Consider inclusion of an affordable rental housing target within the Design Guide, aligned with the targets in the North District Plan for government-owned land and Landcom's affordable housing target.
Consider a range of approaches to determining rental costs for affordable rental housing	<p>Noting the relatively high median house price and weekly household rent in the study area, affordable rental housing rented at 80% of market rent may not be affordable for households earning less than 40% of median income (a common approach to determining housing costs for affordable rental housing).</p>	<ul style="list-style-type: none"> N/A: Future consideration, not applicable at this stage of the planning process 	<ul style="list-style-type: none"> This recommendation is for CHPs.

⁶ Greater Sydney Commission, Sydney Region Plan

Recommendation	Comment	Design recommendations to inform the masterplan	Planning mechanism (for discussion)
	It may be appropriate for Landcom to implement an alternative affordable housing metric to determine appropriate rental prices for affordable rental housing in the precinct (e.g., 30% of household income). This recommendation is targeted towards community housing providers.		
Ensure all affordable rental housing is 'tenure blind'	<p>Ensure there are "no explicit external indicators of tenure type in the design and layout of a development."⁷</p> <p>This contributes towards minimising the stigma attached to any affordable rental housing, and increases the likelihood of a socially mixed, cohesive and connected community.</p>	<ul style="list-style-type: none"> Encourage high quality of architectural design in the overall Cherrybrook SSP precinct that positively contributes toward the surroundings. 	<ul style="list-style-type: none"> Ensure that residential development in the Cherrybrook SSP complies with SEPP 65 (Apartment Design Guide), in line with legislative requirements. Consider implementation of a design excellence framework or design advisory panel, in collaboration with Hornsby Shire Council, to encourage higher standards of design quality. Consider inclusion of controls within the Design Guide to ensure the affordable rental housing that is delivered, meets the same design quality thresholds as the rest of the precinct.
Agglomerate affordable rental housing units to improve management efficiencies for community housing providers	<p>The approach of agglomerating affordable housing units – either within a single building, or within floors of buildings, improved management and operational efficiencies for community housing providers. Subject to this housing being visually indistinguishable externally, this would not impact on social mix and sustainability goals.</p>	<ul style="list-style-type: none"> N/A: Future consideration, not applicable at this stage of the planning process 	<ul style="list-style-type: none"> Consider including an objective or controls within the Design Guide regarding the concentration of affordable rental housing within the development without jeopardising rental costs.

⁷ Van de Nouwelant, R & Randolph, B 2016, "Mixed-tenure development: Literature review on the impact of differing degrees of integration," *City Futures Research Centre*, Report to Frasers Property, October 2016, p.2 < <https://cityfutures.be.unsw.edu.au/documents/463/Mixed-communities-for-FPA-Final.pdf>>

Appendix A. Study requirements

Study requirement	How does this study meet the requirement?	Reference
6.1 Undertake a housing needs and forecasting analysis for the precinct to identify the appropriate mix of dwelling types and sizes to support a diverse, healthy and socially sustainable community.	This study includes a detailed housing supply analysis, including overview of dwelling type and tenure. This has been analysed against the likely demand for housing in the study area, based on forecast population growth and age structure, household type and size, as well as market activity.	Section 3.0 Cherrybrook SSP Context Section 4.0 Housing needs analysis
6.2 Consider the need to increase housing diversity.	Based on the findings of the supply and demand analysis, this study concludes that increased housing diversity is required to meet a broader range of community needs.	Section 4.0 Housing needs analysis Section 5.0 Recommendations and planning implementation advice
6.3 Demonstrate how the proposed planning controls will support the achievement of housing and development objectives.	The outcomes of the study have informed the recommendation of planning controls to support the achievement of increased supply, diversity and affordability of housing in the Cherrybrook SSP.	Section 5.0 Recommendations and planning implementation advice
6.4 Demonstrate how the proposal will meet NSW Government's commitment to delivering more Affordable Housing in <i>A Plan for Growing Sydney</i> including the affordable rental housing target of 5-10% of new residential floorspace (North District Plan) particularly for government led urban renewal projects.	The outcomes of the study indicate demand for affordable rental housing in the Cherrybrook SSP to support individual and community wellbeing, and a socially sustainable community.	Section 5.0 Recommendations and planning implementation advice

Appendix B. Strategic policy context

North District Plan	
Greater Sydney Commission, 2018	
Purpose and vision	<p>The Greater Sydney Commission's <i>North City District Plan</i> is a 20-year plan to manage growth in Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches, Ryde and Willoughby LGAs. The plan represents what should be reflected in local planning documents.</p> <p>The overarching vision for the Central City District, where the site is located, is for a "30 minute city" with "quicker and easier access to a wide range of jobs, housing types and activities...[to] improve the District's lifestyle and environmental assets."</p>
Key actions	<p>Planning Priorities and actions of particular importance to the Cherrybrook Precinct have been outlined below.</p> <ul style="list-style-type: none"> • Planning Priority C1: Planning for a city supported by infrastructure <ul style="list-style-type: none"> – <i>Action 1: Prioritise infrastructure investments to support the vision of A Metropolis of Three Cities.</i> – <i>Action 2: Sequence growth across the three cities to promote north-south and east-west connections.</i> – <i>Action 4: Sequence infrastructure provision using a place-based approach.</i> • Planning Priority C5: Providing housing supply, choice and affordability with access to jobs, services and public transport <ul style="list-style-type: none"> – <i>Action 16: Prepare local or district housing strategies that address the following:</i> <ul style="list-style-type: none"> a. <i>The delivery of five-year housing supply targets for each local government area</i> b. <i>the delivery of 6–10 year (when agreed) housing supply targets for each local government area</i> c. <i>capacity to contribute to the longer term 20-year strategic housing target for the District</i> d. <i>the housing strategy requirements outlined in Objective 10 of A Metropolis of Three Cities that include:</i> <ul style="list-style-type: none"> i. <i>creating capacity for more housing in the right locations</i> ii. <i>supporting planning and delivery of growth areas and planned precincts as relevant to each local government area</i> iii. <i>supporting investigation of opportunities for alignment with investment in regional and district infrastructure</i> iv. <i>supporting the role of centres</i> – <i>Action 17: Prepare Affordable Rental Housing Target Schemes following development of implementation arrangements.</i>

Central City District Plan	
Greater Sydney Commission, 2018	
Purpose & vision	<p>The Greater Sydney Commission's <i>Central City District Plan</i> is a 20-year plan to manage growth in the Parramatta, Cumberland, Blacktown and The Hills LGAs. The Plan represents what should be reflected in local planning documents.</p> <p>The overarching vision for the Central City District, where the site is located, is for a "30 minute city" with "quicker and easier access to a wide range of jobs, housing types and activities...[to] improve the District's lifestyle and environmental assets."</p>
Key actions	<p>Planning Priorities and actions of particular importance to the Cherrybrook Precinct have been outlined below.</p> <ul style="list-style-type: none"> • Planning Priority C1: Planning for a city supported by infrastructure

Central City District Plan

- *Action 1: Prioritise infrastructure investments to support the vision of A Metropolis of Three Cities.*
- *Action 2: Sequence growth across the three cities to promote north-south and east-west connections.*
- *Action 4: Sequence infrastructure provision using a place-based approach.*
- Planning Priority C5: Providing housing supply, choice and affordability with access to jobs, services and public transport
 - *Action 16: Prepare local or district housing strategies that address the following:*
 - a. *The delivery of five-year housing supply targets for each local government area*
 - b. *the delivery of 6–10 year (when agreed) housing supply targets for each local government area*
 - c. *capacity to contribute to the longer term 20-year strategic housing target for the District*
 - d. *the housing strategy requirements outlined in Objective 10 of A Metropolis of Three Cities that include:*
 - i. *creating capacity for more housing in the right locations*
 - ii. *supporting planning and delivery of growth areas and planned precincts as relevant to each local government area*
 - iii. *supporting investigation of opportunities for alignment with investment in regional and district infrastructure*
 - iv. *supporting the role of centres.*
 - *Action 17: Prepare Affordable Rental Housing Target Schemes following development of implementation arrangements.*

A Housing Strategy for NSW – Discussion Paper

NSW Government (2020)

Purpose & Vision

A Housing Strategy for NSW - Discussion Paper was placed on exhibition in June and July 2020. The Discussion Paper forms the basis of the first whole-of-government, whole-of-state housing strategy for NSW. The Discussion Paper forms the first step in developing the NSW Housing Strategy which will present a coordinated, proactive and responsive approach to housing needs over the next 20 years. It is arranged into four interrelated themes of supply, diversity, affordability and resilience, proposing a vision for housing in NSW and includes:

- *The key factors that influence housing in NSW;*
- *The key trends in housing, providing a snapshot of how people live today and how they might live in the future;*
- *How the NSW Government is currently responding and preliminary directions that could be explored in the Strategy; and*
- *Discussion questions to help formulate feedback.*

The Discussion Paper presents the following vision for the NSW Housing Strategy:

Housing that supports security, comfort and choice for all people at all stages of their lives, achieved through supply that meets the demand for diverse, affordable and resilient housing and responds to environmental, cultural, social and economic contexts.

The proposed vision seeks to achieve the following broad outcomes:

- *Housing supply in the right locations and at the right time;*
- *Diverse housing for diverse needs;*
- *Housing that is more affordable; and*

A Housing Strategy for NSW – Discussion Paper	
	<ul style="list-style-type: none"> • <i>Enduring and resilient housing.</i>
Key Actions	<p>The Discussion Paper outlines the importance of the following NSW Government partners to be involved in the delivery of affordable housing:</p> <ul style="list-style-type: none"> • <i>The Australian Government who can continue to support first home buyers, provide funding for social and affordable housing and homelessness services, and support for tenants;</i> • <i>Council who can adopt Affordable Housing Contribution Schemes and demonstrate innovation on their landholdings;</i> • <i>Industry who can provide new housing models and tenures that support affordability, including for first home buyers. Industry can also consider 'meanwhile uses' on vacant landholdings for homelessness accommodation;</i> • <i>Community housing providers who will continue to increase their capacity by leveraging available policies and concessions; and</i> • <i>Communities who can understand the local economic and social benefits that a mix of tenures providers.</i>

Cherrybrook Structure Plan	
Transport for New South Wales & Department of Planning, Industry and Environment (2013)	
Purpose and vision	<p>The <i>Cherrybrook Structure Plan</i> provides a framework which will guide future planning within the area. It is the result of assessing the natural and built elements as well as the existing planning controls of the Cherrybrook locality. The Plan is founded on principles of providing greater connectivity, strengthening existing links and providing new links between the Cherrybrook Station and the surrounding uses.</p> <p>The Cherrybrook Precinct looks to adopt the principles of Transit Oriented Development (TOD) which comprise of mixed use development within walking distance of a transit node that provides a range of residential, commercial, open space and public facilities which are well connected by walking and cycling infrastructure as well as public transport.</p>
Key findings	<p>The Plan acknowledges a high-level demand analysis that was undertaken to ascertain the demand for potential development scenarios on opportunity sites within the Cherrybrook Precinct. The outcomes of the demand analysis found the following:</p> <ul style="list-style-type: none"> • Demand for additional dwellings; Future demand for additional residential development in the Study Area is estimated to be in the order of 128 dwellings per annum. Such demand is related to the high level of amenity and quality of life afforded within Cherrybrook, the demand for housing diversity and improved access to social, recreational and employment opportunities as a result of the Metro North West Line. • Demand for employment lands; Future demand for additional employment (commercial and retail) floorspace within the Study Area is projected to remain a constant within the Study Area through to 2036. • A particular type and location of development; Provision of 3-6 storey apartments within close walking distance of the new train station and townhouse development on the periphery of the precinct where large single lots could accommodate 2-4 townhouses each.

Hornsby Local Strategic Planning Statement	
Hornsby Shire Council (2020)	
Purpose and vision	The <i>Hornsby Local Strategic Planning Statement</i> (LSPS) establishes a 20 year vision for land use; the special character and values that are to be preserved; shared community values; and how Hornsby Shire Council will manage growth and change. The LSPS provides a high-level understanding of the key issues, community priorities and current policy position on land use planning matters under the themes of liveability, sustainability, productivity and collaboration.
Key actions	Key actions relevant to the housing within the LGA include: <ul style="list-style-type: none"> • <i>Concentrate future housing provision in our Strategic Centre – Hornsby Town Centre;</i> • <i>Finalise the Housing Strategy update;</i> and • <i>Prepare and adopt a design excellence Planning Proposal and submit to the Department of Planning, Industry and Environment for a Gateway Determination.</i>

Hornsby Shire's Community Strategic Plan 2018-2028	
Hornsby Shire Council (2018)	
Purpose and vision	The Hornsby Shire's <i>Community Strategic Plan, Your Vision, Your Future 2028</i> , embodies the vision for the future of the Hornsby Shire community and sets the broad strategic direction for Council's long-term planning documents. Council's commitments to meet the community's vision are set under four key themes of liveability, sustainability, productivity and collaboration.
Key actions	Council are committed to providing infrastructure that meets the needs of the population including housing that is affordable and of a reasonable standard (outlined within Indicator 1.1a: <i>Feel able to afford reasonable standard of housing in the area</i>).

Hornsby Shire's Affordable Housing Discussion Paper	
Hornsby Shire Council (2018)	
Purpose and vision	<p>The purpose of the <i>Hornsby Shire's Affordable Housing Discussion Paper</i> is to:</p> <ul style="list-style-type: none"> • <i>Explore housing affordability as it relates to Hornsby Shire;</i> • <i>Explore options for local government to assist address housing affordability issues;</i> • <i>Consider how Hornsby Council can update its housing strategy to encourage the provision of adequate, appropriate and affordable housing;</i> • <i>Seek feedback from the community to better understand housing affordability concerns; and</i> • <i>Seek suggestions from the community to help develop an updated housing strategy.</i> <p>Council's core housing goal is to:</p> <p><i>Support community well-being through the provision of housing that is affordable and appropriate to household needs and preferences in terms of choice and location, while protecting and enhancing local surroundings and the natural environment.</i></p> <p>Council outline that improved housing affordability can be achieved through planning mechanisms, direct facilitation/provision of affordable housing, and advocacy or partnership. Options for housing policy include the following:</p> <ul style="list-style-type: none"> • <i>Mandating a mix of dwelling types;</i> • <i>Rezoning for dual occupancies, terraces and townhouses (the Missing Middle);</i> • <i>Requiring the provision of affordable housing in new development (inclusionary zoning);</i> • <i>Section 7.11 Contributions (SEPP 70);</i> • <i>Voluntary Planning Agreements;</i>

Hornsby Shire's Affordable Housing Discussion Paper	
	<ul style="list-style-type: none"> • <i>Supply of Council-Owned Land;</i> • <i>Engage a community housing organisation; and</i> • <i>Advocate and advertise.</i>
Key actions	<p>Key objectives that are intended to inform Council's housing policy and that are relevant to the Cherrybrook Precinct include:</p> <ul style="list-style-type: none"> • <i>Increase the supply of rental housing;</i> • <i>Promote housing diversity through a range of housing types;</i> • <i>Promote adaptable housing for the aging;</i> • <i>Increase the proportion of medium density dwellings;</i> • <i>Promote good quality urban and housing design;</i> • <i>Promote multi-unit housing in locations which currently lack housing choice and affordability;</i> • <i>Ensure that the location of new housing offers residents adequate access to transport, employment, services, and to social and support networks;</i> • <i>Promote housing development that reflects land capability and pursues the principles of ecologically sustainable development;</i> • <i>Minimise impact on the environment, including the environmental costs of infrastructure construction; and</i> • <i>Provide additional housing in areas where adequate sewerage, drainage, transport, community services and facilities, water, open space, recreation opportunities, schools, employment and public transport are or can be provided.</i>
Local Housing Strategy (Exhibition Draft)	
Hornsby Shire Council (2020)	
Purpose and vision	<p>Hornsby Shire Council's draft Local Housing Strategy (LHS) outlines the twenty year vision and priorities for housing in the Shire, responding to issues of population growth and housing affordability.</p> <p>The vision of the LHS is:</p> <p><i>"Support community well-being through the provision of housing that is affordable and appropriate to household needs and preferences in terms of choice and location, while protecting and enhancing local surroundings and the natural environment."</i></p> <p>The LHS responds to a number of key housing issues and priorities, including:</p> <ul style="list-style-type: none"> • Population growth, including a need for 14,879 new homes by 2036; • Delivering homes that contribute to smaller environmental footprints, including delivering higher density housing in well-connected centres; • More housing diversity – in particular, there are existing gaps in smaller studio and one bedroom units, medium density housing and affordable rental housing; • More affordable housing; • Demand for residential aged care and seniors living; • Preserving local character and the natural environment. <p>The LHS identifies that Hornsby does not have a projected housing supply gap, as there is sufficient zoned land and development pipeline capacity in the Shire to accommodate short to medium term dwelling growth (2016-2026). Beyond 2026, existing residential zones, combined with new housing developed through the revitalisation of the Hornsby Town Centre and government land around Cherrybrook, will exceed the State Government's projected housing needs to 2036.</p> <p>Council has identified that Cherrybrook will play an important role in meeting demand for housing across the Shire.</p>

Local Housing Strategy (Exhibition Draft)	
Key findings	<p>Key objectives that are relevant to the Cherrybrook Precinct include:</p> <ul style="list-style-type: none"> • <i>Promote design excellence to ensure new housing delivers high quality buildings and an urban realm that respects current and future desired local character, green spaces and landscaping.</i> • <i>Ensure new housing development minimises environment impact and promotes ecologically sustainable development</i> • <i>Protect sensitive areas from development, and ensure new housing does not detract or erode an area's local character</i> • <i>Identify opportunities to encourage housing diversity including medium density, adaptable housing for the aging and multi-unit housing in areas of limited choice and availability</i> • <i>Promote sustainable locations for housing growth close to transport, which support the role of centres, have adequate infrastructure and maximise opportunities through collaboration.</i> • <i>Ensure housing growth aligns with the Region and District Plan priorities, planned infrastructure growth and will deliver the District Plan housing targets.</i>
Hills Future 2036: Local Strategic Planning Statement	
<i>The Hills Shire Council (2020)</i>	
Purpose and vision	<p>The <i>Hills Local Strategic Planning Statement</i> (LSPS) establishes a 20-year vision for exceptional living, working and leisure places where expected growth brings vibrancy, diversity, liveability and prosperity. This is supported through five key themes of:</p> <ul style="list-style-type: none"> • <i>A vibrant community and prosperous economy;</i> • <i>Shaping growth;</i> • <i>Delivering and maintaining infrastructure;</i> • <i>Valuing our surroundings; and</i> • <i>Proactive leadership.</i>
Key findings	<p>The Hills Shire is identified within the top five LGA's forecasted for the delivery of additional dwellings over the next five years. Council is committed to plan for diverse housing that accommodates the growing population and that is delivered in the right locations. The LSPS notes that higher density housing must be provided in areas connected to or within reach of transport and other urban services. Cherrybrook has been identified for future uplift however will be monitored by Council to ensure significant change only occurs once infrastructure is in place. Another priority of Council is their commitment to providing diverse housing which accommodated the growing number of family households. Council has also acknowledged a growing demand for smaller dwellings for families close to public transport and other facilities.</p>
The Hills Future Community Strategic Plan (2017-2021)	
<i>The Hills Shire Council (2017)</i>	
Purpose and Vision	<p>The <i>Hill's Community Strategic Plan</i> expresses the community's vision and aspirations for the municipality for the next 10 years. The plan identifies proposed strategies and measures to achieve these desired goals and determine the effectiveness of the outcomes. This plan is guided through 5 key strategic directions that were determined through extensive community consultation:</p> <ul style="list-style-type: none"> • <i>Building a vibrant community and prosperous economy;</i> • <i>Proactive leadership;</i> • <i>Shaping growth;</i> • <i>Delivering and maintaining infrastructure; and Valuing surroundings.</i>
Key Actions	<p>A key desired outcome for the community is a connected and inclusive population with a range of services and facilities that contribute to health and wellbeing. The Plan outlines Council's commitment to strategically plan for the North West Sector growth through development and construction of transport infrastructure, parks and other civil infrastructure.</p>

The Hills Shire Council Housing Strategy 2019

The Hills Shire Council (2019)

Purpose and Vision	<p>The <i>Hills Shire Council Housing Strategy 2019</i> plans for the mix of housing that will be located in the Shire's greenfield areas or station precincts along the Metro North West corridor. The Strategy has been developed around five planning priorities that reflect the planning priorities of Council's Local Strategic Planning Statement, <i>Hills Future 2036</i>. The priorities are to:</p> <ul style="list-style-type: none"> • <i>Plan for new housing to support Greater Sydney's growing population;</i> • <i>Plan for new housing in the right locations;</i> • <i>Plan for a diversity of housing;</i> • <i>Renew and create great places; and</i> • <i>Provide social infrastructure and retail services to meet residents' needs.</i>
Key Actions	<p>The Department of Planning, Industry and Environment's 2016 population projections estimate that The Hills will be home to an additional 128,000 residents by 2036. In order to accommodate an additional 128,000 residents by 2036, approximately 38,000 dwellings will likely be required (assuming an average occupancy rate of 3.3 people per dwelling).</p> <p>Councils approach to affordable housing seeks to ensure a mix of housing types is available across the Shire that is affordable for very low, low and moderate income households to ensure the population is socially diverse and represents all income groups.</p> <p>Council have committed to a variety of actions, some of these include:</p> <ul style="list-style-type: none"> • <i>Use the hierarchical zoning framework to identify the intention for housing growth close to centres, services and transport and to protect areas with environmental and scenic qualities;</i> • <i>Support coordinated development of higher density development in station precincts based upon a transit-oriented approach;</i> • <i>Encourage orderly and serviceable growth around Cherrybrook station;</i> • <i>Aim for a supply of apartments for larger households with sufficient space, quality and facilities;</i> • <i>Encourage affordable housing in areas supported by services and infrastructure;</i> • <i>Support medium density residential development in areas serviced by infrastructure; and</i> • <i>Support housing for seniors and people with a disability in accordance with the requirements listed in the Strategy.</i>

The Hills Shire Productivity and Centres Strategy

The Hills Shire Council (2019)

Purpose and vision	<p>The <i>Hills Shire Productivity and Centres Strategy</i> identifies the basis for the strategic planning of employment lands and centres in the Shire to 2036. It gives effect to the Local Strategic Planning statement and is expressed through the five key themes:</p> <ul style="list-style-type: none"> • <i>Plan for sufficient jobs, targeted to suit the skills of the workforce;</i> • <i>Build strategic centres;</i> • <i>Provide retail services to meet residents needs;</i> • <i>Renew and create great places; and</i> • <i>Retain and manage valuable industrial urban service land.</i>
Key findings	<p>The strategy notes new housing will be concentrated around Metro North West Line station precincts.</p>

Landcom Strategic Directions

Landcom (2017)

Purpose and vision	<p>Landcom is a State Owned Corporation working across government and with the private sector to produce quality housing and communities that deliver social, environmental and economic benefits to the people of NSW.</p> <p>Landcom Vision:</p>
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Landcom Strategic Directions	
	<i>To deliver city shaping projects that are more affordable, vibrant, connected and sustainable places to live.</i>
Key actions	<p>A key strategic direction of Landcom is to increase the affordability, supply and diversity of housing. Key objectives include:</p> <ul style="list-style-type: none"> • Making it easier for people to own their own home; • Demonstrating new housing typologies to provide a greater choice of homes; and • Delivering strategic projects across NSW. <p>Landcom are committed to the following: delivering new housing focussed in areas where there is current or future infrastructure, giving communities improved access to public transport and services.</p>
Landcom Housing Affordability and Diversity Policy	
<i>Landcom (2017)</i>	
Purpose and vision	<p>The Landcom Housing Affordability and Diversity Policy sets out the requirements to deliver Affordable Housing and achieve more diverse housing through innovation across Landcom project.</p> <p>Landcom aims to deliver housing affordability and diversity in a manner which:</p> <ul style="list-style-type: none"> • <i>shows corporate and Government leadership and stimulates important industry innovation;</i> • <i>provides a consistent corporate approach to the delivery of housing affordability, and housing diversity through innovation across the project portfolio;</i> • <i>contributes to a city of housing choice, with homes that sustainably meet our needs and lifestyles;</i> • <i>optimises housing supply;</i> • <i>contributes to meeting the breadth of housing needs across a range of incomes and circumstances relevant to Sydney and NSW including delivering housing that bridges the gap between household incomes and market priced housing;</i> • <i>focuses on the delivery of Affordable Housing for rent on all projects proximate to jobs and transport;</i> • <i>enables the provision of diverse and innovative housing on all projects responding to the needs in each location and suiting and supporting a diverse population where inequalities are minimised;</i> • <i>encourages financial innovation in procurement, delivery processes and products to deliver housing affordability and diversity in a commercially astute manner; and</i> • <i>involves productive partnerships with Community Housing Providers and other stakeholders to maximise affordability and diversity outcomes.</i>
Key actions	<p>The Policy is implemented by each Landcom project responding to the four corporate commitments which include:</p> <ul style="list-style-type: none"> • <i>Corporate Commitment 1: Target 5-10 per cent of new homes as Affordable Housing across each project;</i> • <i>Corporate Commitment 2: Include Housing Diversity Pilot Projects to demonstrate new models where appropriate;</i> • <i>Corporate Commitment 3: Optimise housing in appropriate locations with design excellence to help meet overall supply needs; and</i> • <i>Corporate Commitment 4: Support housing innovation by pursuing partnerships, tools and opportunities which relate to housing diversity and affordability.</i>

Appendix C. Demographic profile (2016)

Category	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
<u>Income</u>				
Median household income (annual)	\$157,200	\$122,800	\$111,610	\$92,200
Variation from median	70.5%	33.2%	21.1%	0.0%
% of Households earning \$2,500pw or more	60.1%	47.3%	41.5%	31.8%
<u>Age Structure</u>	-	-	-	-
Median Age (years)	40.7	37.8	39.7	36.4
<u>Country of Birth</u>	-	-	-	-
Australia	53.3%	64.8%	62.8%	61.9%
Other Major English Speaking Countries	8.2%	8.0%	8.9%	7.6%
Other Overseas Born	38.5%	27.2%	28.3%	30.5%
<u>Household Composition</u>	-	-	-	-
Couple family - Total	85.4%	78.2%	70.9%	61.3%
Family Households - Total	93.2%	87.2%	80.8%	73.7%
Lone person household	6.1%	11.4%	17.4%	21.7%
<u>Dwelling Structure (Occupied Private Dwellings)</u>	-	-	-	-
Separate house	93.4%	82.7%	73.8%	57.2%
Semi-detached, row or terrace house, townhouse etc.	6.6%	11.7%	8.6%	14.0%
Flat, unit or apartment	0.0%	5.5%	17.3%	28.2%
Other dwelling	0.0%	0.1%	0.2%	0.5%
<i>Occupancy rate</i>	96.3%	94.6%	94.1%	92.3%
Average household size	3.3	3.2	2.9	2.8

Category	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
<u>Tenure Type (Occupied Private Dwellings)</u>	-	-	-	-
Owned outright	41.7%	35.1%	36.2%	30.0%
Owned with a mortgage	45.5%	46.6%	40.4%	34.2%
Rented	12.6%	17.4%	21.7%	35.1%
<u>Highest Year of School Completed (% of population aged 15 years and over)</u>	-	-	-	-
Year 12 or equivalent	82.7%	72.9%	76.4%	67.5%
<u>Monthly Mortgage Repayments (occupied private dwellings being purchased)</u>	-	-	-	-
Median monthly mortgage repayment	2,830	2,640	2,490	2,240
Variation from median	26.3%	17.9%	11.2%	0.0%
<u>Weekly Rent</u>	-	-	-	-
Median weekly rent	730	580	510	450
Variation from median	62.2%	28.9%	13.3%	0.0%
<u>Occupation</u>	-	-	-	-
Managers	19.1%	17.6%	15.6%	13.7%
Professionals	36.9%	29.0%	33.7%	26.3%
Technicians and trades workers	7.0%	10.5%	9.8%	11.7%
Community and personal service workers	5.9%	7.7%	8.9%	9.6%
Clerical and administrative workers	15.2%	16.3%	14.7%	14.6%
Sales workers	8.8%	9.6%	8.2%	9.0%
Machinery operators and drivers	2.0%	3.0%	2.5%	5.6%
Labourers	3.6%	4.7%	5.3%	7.6%
<u>Top 5 Countries of Birth</u>				

Category	Study Area	Hills Shire	Hornsby Shire	Greater Sydney
1	Australia (53.3%)	Australia (64.8%)	Australia (62.8%)	Australia (61.9%)
2	China (7.8%)	China (5.4%)	China (6.5%)	China (5.0%)
3	India (6.2%)	India (3.8%)	England (4.5%)	England (3.4%)
4	England (3.5%)	England (3.4%)	India (4.0%)	India (2.9%)
5	Hong Kong (3.4%)	South Africa (1.6%)	Korea South (1.9%)	New Zealand (1.9%)
<u>Top 5 Languages Spoken at Home</u>				
1	English (57.8%)	English (44.9%)	English (45.1%)	English (62.5%)
2	Mandarin (9.8%)	Mandarin (6.5%)	Mandarin (7.5%)	Mandarin (5.1%)
3	Cantonese (7.6%)	Cantonese (3.5%)	Cantonese (4.1%)	Arabic (4.3%)
4	Hindi (2.8%)	Korean (2.0%)	Korean (2.4%)	Cantonese (3.1%)
5	Korean (2.8%)	Hindi (2.0%)	Hindi (1.7%)	Vietnamese (2.2%)

Current and forecast population.

The current Estimated Resident Population (ERP) of the study area is 4,260 in 2020.

Table 11 Population profile, 2011-2020

Population	2011	2016	2020	2016 to 2020
Study Area	4,450	4,340	4,260	-180
Hills Shire	147,780	162,980	183,910	36,130
Hornsby Shire	143,270	147,390	154,070	10,800
Growth Rate				
Study Area		-0.5%	-0.5%	-0.5%
Hills Shire		2.0%	3.1%	2.5%
Hornsby Shire		0.6%	1.1%	0.8%
Average Annual Growth				
Study Area		-20	-20	-20
Hills Shire		3,040	5,230	4,010
Hornsby LGA		820	1,670	1,200

Age profile

Between 2011 and 2016, the median age of the Study Area increased slightly from 39.0 to 40.7 years.

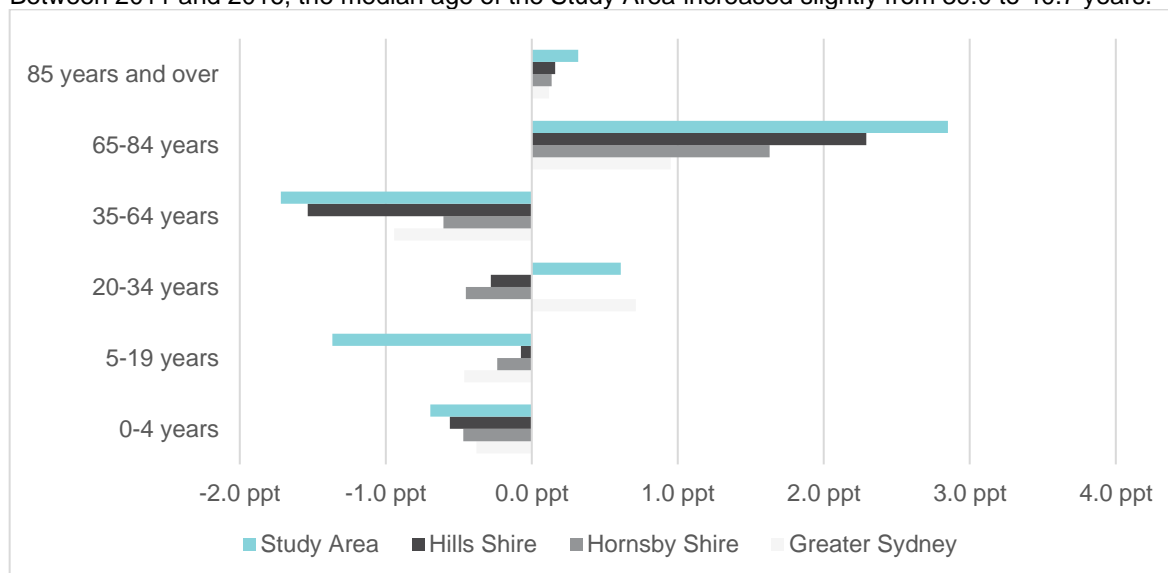


Figure 8 Change age profile between 2011 and 2016

Forecast population

The population of the study area is forecast to increase from 4,260 in 2020 to 12,230 in 2036.

Table 12 Current and Future Population, 2020-2036

Population	2020	2026	2031	2036	2020 to 2036
Study Area	4,260	4,580	7,740	12,230	7,970
Hills Shire	183,910	226,180	256,580	291,560	107,650
Hornsby Shire	154,070	162,360	169,110	176,890	22,820
Growth Rate					
Study Area		1.2%	11.1%	9.6%	6.8%
Hills Shire		3.5%	2.6%	2.6%	2.9%
Hornsby Shire		0.9%	0.8%	0.9%	0.9%
Average Annual Growth					
Study Area		50	630	900	500
Hills Shire		7,050	6,080	7,000	6,730
Hornsby Shire		1,380	1,350	1,560	1,430