



Fragmented on the Basis of Class

Sydney, Australia

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Preface and Acknowledgements

As researchers affiliated with an American university, we attempted to approach the experiences of low-income Australian renters with open minds and humility, recognizing our different social, political, and personal contexts. Our distance—both in degrees of latitude and longitude and in context—limits our understanding of gentrification and displacement relative to the visceral experiences our local stakeholders have shared. Unable to visit Sydney during the COVID-19 pandemic, we believe our qualitative research lacks the voices of the very low-income renters we profess knowledge about. Still, many of our interviewees have extensive experience with vulnerable communities, identify as advocates for tenants or affordable housing broadly, or have experienced gentrification and displacement personally or in their home communities. We have used their words where possible to uplift these experiences.

While the World Wide Web and data analysis tools can help us travel farther than ever with quantitative research, we also encountered challenges in this regard. Critically, while the American Community Survey disaggregates data on geographic mobility by income level and other demographic characteristics, thus providing a clearer snapshot of gentrification and displacement, the Australian census does not disaggregate its geographic mobility data. Thus, quantifying these phenomena in Sydney required making assumptions about displacement and gentrification that could also have applied in areas that experienced greater economic mobility or some unstudied community development efforts.

Our team would also like to pay our respects to Australia's Aboriginal community. They are the longtime stewards of the land we were so fortunate to learn about when researching and working on this project. We recognize and celebrate the Aboriginal community's ongoing connection and commitment to the land that has been their home for generations. Finally, we support building and maintaining humble and compassionate connections to this historic Indigenous population as a way to create equitable housing in Australia.

We would also like to thank Nicole Gurrán, Somwrita Sarkar, and Laurence Troy of the University of Sydney for their incalculable contributions to this report. Thank you for your insight and patience—this research would not have been possible without you. Much gratitude to the individual stakeholders from Sydney that we interviewed. Your generosity with your time and the knowledge you provided formed an essential part of this report. Thank you to Karen Chapple for guiding us through a challenging yet rewarding semester of work and to Donna Leong for your assistance with research and travel coordination. Last but not least, thank you to our classmates for listening to and supporting us.

Executive Summary

A city like Sydney, described as “fragmented on the basis of class,” having a “latte line that divides the wealthy from the vulnerable,” and not having “even a pocket of affordable living” appears to have been built that way intentionally. This research study seeks to explore the phenomena of vulnerability, gentrification, displacement, and exclusion in Sydney, Australia. It explains that these inequalities are influenced by a complex intersection of state and local government actions; private market supremacy; limited protections for low-income renters; speculation and commodification; and regional impacts of large-scale infrastructure projects across greater Sydney. The report explores key case study neighborhoods in the Sydney and greater Sydney area to better understand the unique neighborhood change and displacement challenges that Sydney residents face. Research performed for this report builds upon UC Berkeley’s Urban Displacement Project (UDP)’s indicators and typologies of displacement and neighborhood change by further expanding on its work in cities outside the United States. It seeks to describe neighborhood change in an international city in order to understand the role of different institutional and local contexts that contribute to gentrification and displacement.

An initial document and literature review studied housing and instability; demographic and socioeconomic trends; capital markets and real estate cycles; neighborhood change; future concerns of gentrification and displacement; and Indigenous housing allocation and public perception. The documents examined relate to the past, present, and future plans for housing development and housing allocation in Sydney and the greater Sydney region. This research also builds upon the work being done by local researchers, community members, and organizations, taking into account the expertise that these individuals hold as stakeholders in Sydney.

This research study adopts a mixed methods approach. Quantitative methods were used to create typologies that highlight areas experiencing gentrification and displacement, exclusion of low-income households, and high versus low risk of future gentrification and displacement. We then mapped these typologies of neighborhood change for the Sydney metropolitan region. The qualitative methods used in this study include semi-structured interviews with key stakeholders and case study analysis of two districts in the Sydney metropolitan region. These research methods help answer the following questions:

- What are the main drivers of neighborhood change in Sydney? How are gentrification and displacement manifesting?
- To what extent are gentrification and displacement (disproportionately) impacting low-income renters in the Sydney metropolitan region?
- What policies or best practices improve housing stability for low-income renters?

Examining the connections between our interview findings and quantitative analysis yielded several important findings:

Australian housing, financial, and social policy is tailored towards profit and wealth generation rather than ensuring housing affordability for the country's citizens. The slow contraction of Australia's social housing sector, a lack of government mechanisms to provide affordable housing, and private sector actions have all contributed to an increasingly inequitable housing environment.

Gentrification and displacement can be spurred by government actions, namely redevelopment of social housing stock and upgrades to transportation infrastructure. These actions often function as triggers of neighborhood change.

Australia lacks robust pathways for accommodating community voices in planning decisions and strong tenant protections for households vulnerable to forced mobility.

Sydney's Aboriginal community faces continued marginalization and the threat of losing their longtime homes, representing the nation's enduring legacy of settler colonialism.

There is a wide range of options that could help remedy housing affordability in the greater Sydney region. These include creating a larger set of financing and zoning mechanisms for affordable housing; increasing financial support for local community housing providers; improving coordination between all levels of government, especially at the local and state level; enhancing planning powers for local councils; providing space for meaningful community input on local planning decisions; and implementing protections for renters against the perils of an unregulated private housing market.

Our project faced numerous obstacles, such as data limitations and the COVID-19 pandemic preventing us from actually travelling to Sydney to conduct research. Nevertheless, we hope that this report contributes to the established literature on gentrification and displacement as set out by the authors who guided our research. Hopefully our work can inspire and inform future research in Sydney and beyond.

Introduction

A city like Sydney, described as “fragmented on the basis of class,” having a “latte line that divides the wealthy from the vulnerable,” and not having “even a pocket of affordable living” appears to have been built that way intentionally. This research study explains that these inequalities are influenced by a complex intersection of state and local government actions; private market supremacy; limited protections for low-income renters; speculation and commodification; and regional impacts of large-scale infrastructure projects across greater Sydney.

The City of Sydney is the state capital of New South Wales (NSW) and is the largest city in Australia. Home to over five million residents, Sydney and the surrounding metropolitan area

are constantly expanding. With this continued expansion and development comes noticeable neighborhood change and gentrification. Increasing gentrification of the central city and the high cost of living in the outermost 'exclusive' suburbs of Sydney are changing which populations can maintain stable housing accommodations in Sydney and the greater Sydney region. As of 2016, 34 percent of its five million residents are renters and are continuously competing for space within the city's limited supply of affordable housing.¹

This study seeks to explore the phenomena of vulnerability, gentrification, displacement, and exclusion in Sydney, Australia. It explores key case study neighborhoods in the Sydney and greater Sydney area to better understand the unique neighborhood change and displacement challenges that Sydney residents face. Research performed for this report builds upon UC Berkeley's Urban Displacement Project (UDP)'s indicators and typologies of displacement and neighborhood change by further expanding on its work in cities outside the United States. It seeks to describe neighborhood change in an international city in order to understand the role of different institutional and local contexts that contribute to gentrification and displacement.

This research builds upon the framework of knowledge on gentrification, displacement, and neighborhood change utilized by UDP and other notable research on these topics. An initial document and literature review studied housing and instability; demographic and socioeconomic trends; capital markets and real estate cycles; neighborhood change; future concerns of gentrification and displacement; and Indigenous housing allocation and public perception. The documents examined relate to the past, present, and future plans for housing development and housing allocation in Sydney and the greater Sydney region. This research also builds upon the work being done by local researchers, community members, and organizations, taking into account the expertise that these individuals hold as stakeholders in Sydney.

This research study adopts a mixed methods approach. Quantitative methods were used to create typologies that highlight areas experiencing gentrification and displacement, exclusion of low-income households, and high versus low risk of future gentrification and displacement. We then mapped these typologies of neighborhood change for the Sydney metropolitan region. The qualitative methods used in this study include semi-structured interviews with key stakeholders and case study analysis of two districts in the Sydney metropolitan region. These research methods help answer the following questions:

- What are the main drivers of neighborhood change in Sydney? How are gentrification and displacement manifesting?
- To what extent are gentrification and displacement (disproportionately) impacting low-income renters in the Sydney metropolitan region?
- What policies or best practices improve housing stability for low-income renters?

The first section of the report provides background information on the factors influencing gentrification and displacement in Sydney, including neighborhood change; ongoing shifts in

¹ ABS 2016; Table G33: Tenure Type and Landlord Type by Dwelling Structure

housing tenure; affordable housing policies; commodification of housing; changing demographic and socioeconomic trends; and the experience of Aboriginal people in the Australian housing system. Part two details our qualitative interview methods and how we constructed our quantitative typologies for gentrification and displacement using data from the Australian Bureau of Statistics (ABS), while also using Twitter and AirBnB data as additional proxy measures. Part three provides additional information on our case study areas—the Redfern-Waterloo district and the Sydenham to Bankstown Transportation Corridor. Part four maps our typologies across ABS census geographies in the greater Sydney region and quantifies gentrification on a regional and case study area level. Parts five, six, and seven weave in the information gained through qualitative data collection to assess the drivers of gentrification and displacement in metropolitan Sydney, their impacts on low-income renters, and policy recommendations, respectively. Part eight considers the role of additional factors like the COVID-19 crisis and the bushfires on Sydney’s housing market. Part nine provides a more detailed set of policy recommendations and concludes the research study.

The Roots of Fragmentation: Factors Influencing Gentrification and Displacement in Sydney

Neighborhood Change

Housing instability constitutes an enormous hardship for lower-income households, particularly those that do not own their own home. A nation that never had a robust social housing sector has decreased its supply of government-managed housing through sell-offs and private-sector favoritism. Insufficient regulation within the housing market prevents housing affordability and stability for its most vulnerable citizens. Instead, it promotes purchasing housing as a form of investment. The prevalence of owning two (or more) homes, as well as capital influxes from international sources, has concentrated homeownership, making it increasingly unattainable for working-class and younger households. Wealthier households that would have historically purchased homes are instead entering the private rental market, which is responding by raising prices and squeezing low-income households’ ability to afford housing. Australia’s national shortage of affordable rental housing for low-income households increased by 35,000 units between 2006 and 2011, and its housing supply is stagnating after years of surplus.² This combination of factors drive spatial patterns of neighborhood change, gentrification, and displacement within the greater Sydney region.

² Hulse, Kath, Margaret Reynolds, Wendy Stone, and Judith Yates. “Shortage of Affordable Private Rental Housing Increasing.” Text. AHURI Research and Policy Bulletin, August 17, 2015. <https://www.ahuri.edu.au/research/research-and-policy-bulletins/195>.

Sydney's economy and housing market continues to boom and expand even as the nation's housing reality becomes progressively more dire. Increases in urban land value spurs gentrification, displacement, and neighborhood change. Local council governments within metropolitan Sydney's boundaries have led redevelopment schemes aimed at altering the characteristics of various suburbs. These urban renewal projects typically involve the redevelopment and rehabilitation of public housing, economic and residential development along existing or improved transit lines, and reshaping areas to suit higher-income residents. Such planning processes bring gentrification and displacement pressures to communities and may contribute to areas becoming exclusionary towards low-income households.

Housing and Instability

Homeownership

Australian housing policy has prioritized and privileged homeownership since before the Second World War, making homeownership a critical piece of the 'Great Australian Dream.' The Australian national government expanded access to homeownership through financing schemes that subsidized deposits and mortgage payments and lengthened repayment periods.³ Homeownership thus became the primary form of housing tenure in Australia, with over 90% of Australian adults owning a home between 1945 and 1980.⁴

As home prices across Australia—and especially in Sydney—started to rise in the 1990s, researchers began documenting declining homeownership rates across Australia.⁵ The decline has been most pronounced among young adults, with homeownership rates falling below 50% in recent years.⁶ This is due in part to rising home prices coupled with stagnant incomes: Australians in New South Wales (NSW) spend on average approximately 42% of their earned income on their mortgage.⁷

Today, homeownership rates still remain substantial even among lower-income households,⁸ but significant challenges remain. Mortgage stress and default serve as major precipitating

³ Bourassa and Yin, 2006 https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1540-6229.2006.00168.x?casa_token=yo2sv4HL38QAAAAA:wLNjSbEue68a2h0UwcoRuEYMb1u-oPAkBDIn7mpjhGrzd0B09kRzUUzPgGxHdNHi2xbLSVvW3pGhBV6W

⁴ Bessant and Johnston, 2012

https://www.tandfonline.com/doi/full/10.1080/14036096.2012.728151?casa_token=Qb6nzN8WAnoAAAAA%3AET30elPLKs22bh-G4VbriceSViNo0tqk2caCulO1XNPYf8-x-GP9xIWvMa8KG6EwajD5HWg-vvLsQ

⁵ Martin, Pawson, and van den Nouwelant, 2016 <https://shapingfutures.gla.ac.uk/wp-content/uploads/2016/09/Shaping-Housing-Futures-Australia-background-paper.pdf>

⁶ Coates and Nolan, 2019 <https://grattan.edu.au/wp-content/uploads/2019/09/Submission-to-Inquiry-into-the-National-Housing-Finance-and-Investment-Corporation-Amendment-Bill-4.pdf>

⁷ Robertson, Joshua, "Eye-watering prices': Australia's housing affordability crisis laid bare", <https://www.theguardian.com/australia-news/2017/may/03/eye-watering-prices-australias-housing-affordability-crisis-laid-bare>

⁸ Martin, P, vdN, 2016

factors in housing instability and displacement for lower-income households.⁹ A variety of national schemes have supported first-home purchasers with low incomes, with the most recent introduced in 2019, but hefty home prices still limit options and push new buyers to more distant but more affordable suburbs.¹⁰

Private Rental Housing

In place of homeownership, younger and higher-income households have increasingly sought housing through the private rental market. From 2006 to 2011 across Australia, the number of lower-income households in the private rental market fell almost inversely to the rise in higher-income households.¹¹ The private rental market has responded to changing patterns of housing tenure and new opportunities for capital accumulation by boosting rents. In Sydney, the private rental market has seen rents soar from a median weekly unit rent of \$309 in March 1990 to \$515 in March 2016 (2016 inflation-adjusted Australian dollars), an increase of 67%.¹²

Sydney's skyrocketing and largely unregulated private rental market poses major challenges to housing stability for lower-income renters. Rental cost burden is high among lower-income renters and has been increasing; while 48% of renters across Australia in the bottom two income quintiles paid more than 30% of their income toward housing costs in 2006, this share increased to 54% in 2011 and 62% in 2013-14.¹³ At the individual level, private renters in Sydney have described sudden, dramatic rent increases—if not flat-out eviction—which have led to furthering instability and displacement.¹⁴

Social Housing

The Australian social housing system includes public housing owned by government agencies, community housing owned by the nonprofit sector, and state owned and managed Indigenous housing (SOMIH). Public housing in Australia has gradually shifted from a model focused on delivering affordable housing to low- and moderate-income working-class households to a model that acts as a safety net for very high-need households. This has sharply reduced political motivation for new social housing construction and changed the socioeconomic makeup of public housing occupants.¹⁵ Shifting political preferences and economic fortunes have also caused sell-offs of public housing stock to private landlords and the transfer of public housing to

⁹ Wiesel, 2014 <https://journals.sagepub.com/doi/full/10.1177/0042098013489739?journalCode=usja>

¹⁰ Coates and Nolan, 2019

¹¹ M, P, vdN, 2016

¹² Tenants' Union of New South Wales, 2016 <https://files.tenants.org.au/policy/RentTracker-June16.pdf>

¹³ M, P, vdN, 2016

¹⁴ Wiesel, 2014

¹⁵ Groenhart, Lucy, and Terry Burke. "Thirty Years of Public Housing Supply and Consumption: 1981–2011." Text. AHURI Final Report, October 31, 2014. <https://www.ahuri.edu.au/research/final-reports/231>.

community housing providers.¹⁶ In 2016, just 4.3 percent of individuals in Sydney lived in public housing, slightly down from 4.6 percent in 2011.¹⁷

The Australian national social housing system has devolved in recent years, with individual states often picking up the burden of creating and preserving affordable housing supply. The NSW state government is attempting to increase the supply of public housing while also pursuing redevelopment policies to upgrade existing public housing estates. Australia continues to undergo loss of state-managed public housing through both large-scale transfers to community housing and sell-offs to private landlords. Australia also lacks well-resourced public assistance and housing policies. State-financed and administered rent assistance payments are small and often cannot adequately subsidize housing costs for Australia's most vulnerable citizens.¹⁸ The Australian government restricts public housing residents from paying rent with rent assistance, though it allows community housing residents to use such financial support, further incentivizing the transfer of social housing from the public sector to the community or nonprofit sector.¹⁹

Affordable Housing

Australia has been working to expand its supply of dedicated affordable housing outside of private market options for households with low and moderate incomes. This does not involve expanding the social housing sector, which tends to serve households with very low incomes. We describe four relevant policies governing affordable housing development below:

Affordable Rental Housing State Environmental Planning Policy (ARHSEPP)

In July 2009, the NSW Government introduced the Affordable Rental Housing State Environmental Planning Policy (ARHSEPP). ARHSEPP's stated purpose is to "facilitate the increased supply and diversity of affordable rental and social housing in NSW." The policy applies to a diverse array of housing types including infill affordable housing, secondary dwellings, boarding houses, share homes, social housing and supportive accommodation.²⁰ The new policy hoped to incentivize private sector developers to produce increased affordable housing dwellings by removing limitations on boarding house development in a number of residential and mixed-use zones, permitting the development of 'secondary dwellings' in residential zones, and providing floor space bonuses to housing developers based on the amount of space they allocate to affordable housing. Studies on ARHSEPP's effectiveness have

¹⁶ Hayward, David. "THE RELUCTANT LANDLORDS? A HISTORY OF PUBLIC HOUSING IN AUSTRALIA." Research-article. <http://dx.doi.org/10.1080/0811149608551610>, May 6, 2008. <https://www.tandfonline.com/doi/pdf/10.1080/0811149608551610>.

¹⁷ Australian Bureau of Statistics, 2016.

¹⁸ Services Australia, 2019, <https://www.servicesaustralia.gov.au/individuals/services/centrelink/rent-assistance>.

¹⁹ Australian Government Department of Social Services. 2019. *Commonwealth Rent Assistance*. <https://www.dss.gov.au/housing-support/programmes-services/commonwealth-rent-assistance>

²⁰ New South Wales Government. Affordable Rental Housing SEPP. <https://www.planning.nsw.gov.au/Policy-and-Legislation/Housing/Diverse-and-affordable-housing/Affordable-Rental-Housing-SEPP>

found that the policy has produced a small amount of very low- and low-income affordable housing in major residential areas of Sydney.²¹

State Environmental Planning Policy 70 (SEPP 70)

In 2002, the NSW Government released SEPP 70, a third addition to the State Environmental Planning Policy legislation aimed at increasing affordable housing. SEPP 70 allows local councils to create affordable housing contribution schemes for developers. These schemes are then submitted to the state government and, if approved, are added to local environmental plans so that affordable housing allocation then becomes a part of the conditions for development consent. This acts as an inclusionary housing instrument by requiring affordable housing to be generated from development.²³ Originally, SEPP 70 only applied to the City of Sydney and a few other NSW councils. The NSW Government released a revised State version of SEPP 70 in February of 2018 that expanded this policy to all municipalities.²¹ Research has estimated that this will provide approximately 4,000 additional affordable dwelling units in the greater Sydney region.²³

National Housing Finance and Investment Corporation (NHFIC)

In July 2018, the Australian government established the National Housing Finance and Investment Corporation (NHFIC), a new independent corporate Commonwealth entity intended to increase the supply of affordable housing across the country. NHFIC's key functions include providing loans, investments, grants, and technical support services to affordable housing developers. Two major components of these functions are the Affordable Housing Bond Aggregator (AHBA) and the National Housing Infrastructure Facility.²² The AHBA provides low cost and longer-term loans to Community Housing Providers (CHP) to help them overcome many of the barriers they currently face when attempting to provide affordable housing to their communities. The AHBA works by aggregating the lending requirements of multiple CHPs and issuing bonds to investors in order to raise the funding needed to produce affordable housing.²³ The National Housing Infrastructure Facility provides \$1 billion in funding for housing related infrastructure like water infrastructure upgrades, transportation, wastewater, and power.¹⁸ The Commonwealth also guarantees NHFIC's liabilities, which increases lending and reduces risk for developers of community (nonprofit affordable) housing.

Greater Sydney Commission Affordable Rental Housing Target

The Greater Sydney Council (GSC)'s Greater Sydney Region Plan: A Metropolis of Three Cities (released in 2018) is one of the most recent and still-evolving policies created to address the

²¹ Troy, Laurence, van den Nouwelant, Ryan and Randolph, Bill. 2018. *State Environmental Planning Policy (Affordable Rental Housing) 2009 and affordable housing in Central and Southern Sydney*. City Futures Research Centre on behalf of SSROC.

²² Australian Government. National Housing Finance and Investment Corporation. <https://www.nhfic.gov.au/>

²³ Pawson, Hal, Milligan, Vivienne, and Judith Yates. 2020. *Housing Policy in Australia: A Case for System Reform*, Springer Nature, Singapore

regional need for affordable housing. This plan aims to create a metropolitan region that is better connected, meets the needs of its residents, and advances regional goals. Within this plan the GSC has recommended creating Affordable Rental Housing Targets for defined precincts within councils. The goal of these targets is to increase the supply of affordable housing for very low- to low-income households in Greater Sydney.

The GSC has developed parameters for implementation that dictate how to achieve housing goals without halting current production, undervaluing land, or limiting the amount of capital return to developers. The Affordable Rental Housing Target only applies to new rezoning. It does not extend to existing planning controls that address affordable housing or limit local councils' ability to create additional housing strategies for addressing the issue of affordable housing. Targets within Greater Sydney generally range from 5-10 percent of new residential floor space. To reach these benchmarks, the implementation process includes a viability test to identify each council's unique goals and preferred locations for affordable housing development. This necessitates GSC and State agencies working together to develop detailed strategies for development and maintenance of the housing built using these processes. Key aspects of these strategies include eligibility criteria, allocation, ownership, management, and delivery models.²⁴ Research has estimated that these targets will provide between 3,000 and 13,000 housing units over the course of a decade.²⁵

Financialization of Housing

Commodification

Adding to these issues is the ongoing financialization of Australia's housing sector. Sydney's housing market has become increasingly commoditized, as many people associate housing with the potential for capital gains. Both local and foreign investment have led to rapid increases in land accumulation, which has demonstrated to financiers and the global elite that Australia is an excellent location for wealth extraction. Between 2014 and 2015, foreign investment from China almost doubled from \$12.3 billion to \$24.2 billion for residential and commercial properties.²⁶ While steadily fewer of Sydney's citizens own homes, approximately one-fifth of its homeowners own a second home, reflecting a national attitude that favors the microeconomic mechanism of land accumulation for capital returns.²⁷ People are increasingly finding housing difficult to locate and pay for despite the multitude of financing schemes that have been generated to help people buy a home. Australia's loose regulation of mortgage financing and its low tax rate on capital gains have created an atmosphere conducive to buying a home as a vehicle for capital

²⁴ New South Wales Government. Greater Sydney Region Plan: A Metropolis of Three Cities. <https://gsc-public-1.s3.amazonaws.com/s3fs-public/greater-sydney-region-plan-0318.pdf>

²⁵ Phibbs, Peter, and King Lisa Anne. (2018). Potential Affordable Dwelling Yields from a NSW Inclusionary Zoning Scheme. Sydney: University of Sydney.

²⁶ Somasundaram, Narayanan, "Chinese buyers double down on Australian property" <https://www.smh.com.au/business/the-economy/chinese-buyers-double-down-on-australian-property-20160411-go3que.html>

²⁷ CoreLogic "A profile of the Australian investor – who, where and, what". Media release. (June 20, 2016).

accumulation, which mirrors the environment that led to the housing market crash in 2008. Unfortunately, the Australian government has largely abdicated responsibility for providing affordable housing to low- and working-class households. It has instead transferred ownership of social housing estates to non-profit management,²⁸ many of which lack adequate financial and staffing resources to maintain this housing stock.²⁹ Commodification is therefore decreasing affordability by concentrating homeownership, increasing housing costs, and driving higher-income households into the rental market, which is then destabilizing the market for low-income households.

Historical Underpinnings

Australia's mining boom in the 1960s delivered a large influx of capital that gave financiers the opportunity to integrate themselves into the larger global economy. Banks headquartered in Sydney bought up local property and real estate, which later gave rise to the city's Central Business District (CBD). Throughout this period, planners acted as sidekicks to the financial and development industries in Sydney, systematically utilizing planning tools at their disposal to drive commodification of land through speculation. This subsequently pushed housing, via rezoning and subdivisions, towards the city's fringes.³⁰ Suburbanization and sprawl continue to act as visible markers of Sydney's expansion to this day. Its sprawling communities and new development look physically similar to their suburban American counterpart: large homes with garages, an absence of trees and footpaths, and a general favoritism towards the automobile as the preferred mode of transportation. Suburban areas also contribute to environmental degradation and an imbalance of housing production that favors higher-income households. The highly-politicized environment surrounding urban development has hindered most attempts to curtail sprawl. Many politicians avoid mentioning the subject to avoid appearing vulnerable on the subject of housing development or infrastructure provision.³¹

Demographic and Socioeconomic Trends

The Decline of Middle-Ring Suburbs

Increasing gentrification of the central city and the high cost of living in the outermost 'exclusive' suburbs of cities mean that middle-ring suburbs are now some of the most affordable areas in urban Australia. Economically disadvantaged households, including many immigrants, have moved to these areas because they provide housing at comparatively affordable prices. This

²⁸ NSW Government (2016) Future Directions for Social Housing in NSW. Sydney: Family and Community Services, NSW Government. <http://www.socialhousing.nsw.gov.au/?a=348442>

²⁹ Morris, Alan. 2018. "The Financialisation of Housing and the Housing Crisis in Sydney." *International Union for Housing Finance*, no. Summer 2018 (July): 63–70.

³⁰ Sisson, Alistair, Dallas Rogers, and Chris Gibson. 2019. "Property Speculation, Global Capital, Urban Planning and Financialisation: Sydney Boom, Sydney Bust Redux." *Australian Geographer* 50 (1): 1–9. <https://doi.org/10.1080/00049182.2018.1464365>.

³¹ Merry, Andrew. 2018. "Boomburbs: Sydney's Urban Sprawl Seen from above – in Pictures." *The Guardian*, April 10, 2018, sec. Cities. <https://www.theguardian.com/cities/gallery/2018/apr/10/sydney-urban-sprawl-suburbs-pictures-photography-andrew-merry>.

has transformed the middle-ring suburbs of Australia's major cities such as Sydney, Melbourne, and Brisbane into some of the nation's most disadvantaged communities. These areas increasingly lack access to employment and adequate city and municipal services. They are also suffering from stagnant wages, lower median incomes, and high rates of crime and unemployment. Additionally, these middle suburbs tend to lack adequate public housing to ensure that their inhabitants are not overspending on housing costs.³² The epicenters of disadvantage are moving further and further out to the periphery as central areas continue to gentrify and become unaffordable.³³ This constitutes an enormous policy concern within Australia, as its existing planning frameworks are not suited to address these serious and worsening issues. Moreover, local and state governments have developed few impactful policy solutions to address this issue.

Immigration, Race, and Ethnicity

The composition of immigration to Australia has also changed over the last several decades. The country is receiving fewer immigrants from countries in the European Union and more from countries in Asia. These immigrants mostly enter the country via ports and major cities and tend to settle in large metropolitan areas like Sydney. There is a large degree of social and economic diversity within the immigrant population; some are extremely poor while others are highly educated and very wealthy. Sydney in particular has a higher percentage of skilled, higher-status immigrants and immigrant families than other cities in Australia. Studies have uncovered a positive correlation between immigrant proportions and median housing prices in Australia's metropolitan centers and have shown that immigrants are under-represented in social housing.³⁴ Immigrants who must forcibly relocate to Australia, either due to economic hardship or conflict, experience the highest degree of segregation within Australian society. In general, housing affordability is poor for immigrants, with those who have low incomes and do not speak English experiencing the greatest degree of housing unaffordability. Recent research on Sydney's private rental housing market showed that Anglos experience statistically significant favorable treatment at multiple points during the application and screening process compared to people of Indian or Middle Eastern descent.³⁵

Changes in Household Size

Changing household size is also adding pressure to Australia's housing ecosystem. In addition to a growing population, changing social preferences are impacting the size and number of households. The nation's average household size is shrinking as its citizens are marrying later

³² Randolph, Bill, and Darren Holloway. "The Suburbanization of Disadvantage in Sydney: New Problems, New Policies." *Opolis* 1, no. 1 (2005). <https://escholarship.org/uc/item/84c145ms>.

³³ Pawson, Hal, and Shanaka Herath. "Dissecting and Tracking Socio-Spatial Disadvantage in Urban Australia." *Cities* 44 (April 1, 2015): 73–85. <https://doi.org/10.1016/j.cities.2015.02.001>.

³⁴ Ley, D, and P Murphy. "Immigration in Gateway Cities: Sydney and Vancouver in Comparative Perspective." *Progress in Planning* 55, no. 3 (March 1, 2001): 119–94. [https://doi.org/10.1016/S0305-9006\(00\)00025-8](https://doi.org/10.1016/S0305-9006(00)00025-8).

³⁵ MacDonald, Heather, Jacqueline Nelson, George Galster, Yin Paradies, Kevin Dunn, and Rae Dufty-Jones. "Rental Discrimination in the Multi-Ethnic Metropolis: Evidence from Sydney." *Urban Policy and Research* 34, no. 4 (October 1, 2016): 373–85. <https://doi.org/10.1080/08111146.2015.1118376>.

and having fewer children, which mimics a growing trend in Western nations. The resulting increase in the country's number of households exceeds its rate of housing construction. Therefore, Australia's housing stock is falling further behind its population growth.³⁶

Indigenous Housing

Current Housing Situation

Over 100,000 Australians are estimated to live in housing classified as 'very poor-derelict,' with Aboriginal Australians are three times more likely than non-Aboriginal Australians to live in such dwellings.³⁷ While the housing problems experienced by many Aboriginal people in remote communities are of obvious concern, the majority (79%) of Aboriginal Australians live in major cities and large regional centers.³⁸ Urban Aboriginal people fare worse on most housing indicators than their non-Aboriginal neighbors in national surveys, with higher rates of household crowding, homelessness and need for repairs to their dwellings. As per the 2011 census, only 11 percent of Aboriginal households were homeowners, while 59 percent were renters compared to 68 percent and 29 percent, respectively, for non-Aboriginal households. Aboriginal households were found to be six times as likely to be renting their home from a social housing provider than other Australian households (26% vs 4% respectively).³⁹ While social housing was generally viewed as a desirable tenure type due to the relative stability and affordability it offered, participants living in social housing reported poor dwelling conditions.⁴⁰ Aboriginal people are less likely to own their own homes largely due to the ongoing effects of colonization and dispossession, which includes intergenerational poverty, marginalization, and ongoing racial discrimination in employment and housing markets.⁴¹

Analysis from SEARCH (Study of Environment on Aboriginal Resilience and Child Health) data showed that income was substantially associated with tenure type. Those in the lowest income bracket were seven times more likely to be living in social housing rather than an owned home compared to those in the highest income bracket.⁴² Similarly, those who were unemployed had significantly higher odds of living in social housing relative to owned homes compared with those who were employed.⁴³

Housing instability was more common amongst those renting privately than those living in social housing or in their own home. The odds of having lived in more than four houses since birth was

³⁶ Yu, Xiaojiang. "'The Great Australian Dream' Busted on a Brick Wall: Housing Issues in Sydney." *Cities* 22, no. 6 (December 1, 2005): 436–45. <https://doi.org/10.1016/j.cities.2005.08.001>.

³⁷ Andersen, Melanie J, et al. "Housing conditions of urban households with Aboriginal children in NSW Australia: tenure type matters." *BMC Public Health*, vol. 18, no. 1, 2017. Gale Academic OneFile, Accessed 1 Feb. 2020.

³⁸ Andersen, Melanie J, et al. (2017)

³⁹ Andersen, et al. (2017)

⁴⁰ Ibid

⁴¹ Ibid

⁴² Ibid

⁴³ Ibid

3.31 times higher in Aboriginal children living in private rental housing compared to those living in owned homes. One in eight Aboriginals reported that they had been forced to move out in the past twelve months regardless of tenure type.⁴⁴ Lower income families' experience of residential moves is often characterized by a lack of choice and control rather than more positive reasons like gaining better employment or attaining homeownership. The relatively high proportion of SEARCH families who report being forced to move from where they live in the past 12 months is evidence of unwanted mobility. This suggests that housing policy and economic interventions can potentially have a particularly significant impact on the housing instability of urban Aboriginal families.⁴⁵

Public Perception: A Colonial Legacy

Despite the social, political, and academic achievements of Indigenous movements in various parts of the world, Indigenous minorities in modern nation-states continue to suffer colonial oppression: they are often positioned as interlopers in imagined communities and are situated at the bottom of the racial hierarchies that shape life chances.⁴⁶

The supply and maintenance of affordable housing and infrastructure remains one of the most pressing issues confronting Indigenous living standards. Of the estimated 165,700 Indigenous households in Australia, two-thirds are renters—60 percent of whom live in public housing. More than one-third (58,100) of the permanent houses accommodating Indigenous households have structural problems.⁴⁷

Poor construction and management leads to houses that are poorly maintained and suffer structural deficiencies. Unfortunately, poorly supervised public infrastructure programs and the micro-practices of policy makers, regulators, tradesmen, and manufacturers are rarely blamed for failing housing stock.⁴⁸ Of the many factors influencing the shortage of supply and appropriate maintenance of Indigenous housing, one of the most pervasive and pernicious is the popular narrative placing the blame on Indigenous populations' (supposed) inability to 'keep up' with the demands and frameworks of modern society. Prevailing policy arguments claim that the Indigenous were once hunter-gatherers who have not evolved the proper cultural norms to manage new material forms.⁴⁹ This victim-blaming diagnosis ignores the fact that the endemic overcrowding characteristic of these historically disadvantaged communities contributes to rapid wear and tear on housing. Since Aboriginal housing tends to be cheaply constructed, repair and maintenance issues quickly become a problem.⁵⁰

⁴⁴ Ibid

⁴⁵ Andersen, et al. (2017)

⁴⁶ Morgan, George, and Kalervo Gulson. "Indigenous People And Urbanization". *Environment And Planning A: Economy And Space*, vol 42, no. 2, 2010, pp. 265-267. SAGE Publications, doi:10.1068/a42512. Accessed 1 Feb 2020.

⁴⁷ Lea, T., and P. Pholeros. "This Is Not A Pipe: The Treacheries Of Indigenous Housing". *Public Culture*, vol 22, no. 1, 2010, pp. 187-209. Duke University Press, doi:10.1215/08992363-2009-021.

⁴⁸ Lea & Pholeros (2010)

⁴⁹ Lea & Pholeros (2010)

⁵⁰ Morgan, George, & Gulson (2010)

Additional Concerns

See the Considerations section of this report for additional information we believe is relevant to our study. This includes acute shocks to Australia's national consciousness like the COVID-19 crisis, and the most recent 2019-20 bushfire season. While these shocks have not played a major role in shaping Sydney's housing market yet, we believe they represent an ever-increasing risk to the city's inhabitants and their way of life.

Methods

Qualitative

We conducted semi-structured interviews with various stakeholders across Sydney in order to gain an understanding of the unique neighborhood change and displacement challenges being faced by the region's residents. We also used these interviews to investigate what typologies best characterize the neighborhood change seen in Sydney. These stakeholders include 1) representatives from community organizations, 2) local and regional government officials, 3) academic researchers with expertise in housing, policy, and planning, and 4) real estate and housing development professionals (Appendix I). An interview guide provided structure to this process while maintaining space for nuance in each interview in order to be responsive to the expertise of each participant. We recorded and transcribed each interview using Otter and used an inductive coding process to analyze the findings from all interviews.

A sample of our interview questions include (Appendix II):

1. What do you see as barriers to opportunity for low-income households in Greater Sydney today?
2. What policies, programs or investments have occurred in Greater Sydney that have helped low- and moderate-income households stay in place?
3. Can you walk us through how you've seen the area(s)/region changing in the last several decades, both positive and negative?
4. Can you tell us about any links between transportation and housing development?
5. What are people's sentiments on the ground in (region specific to participant) as it relates to gentrification and displacement? Are these issues being talked about? Who is talking about them?

Quantitative

Census Data

We used census data primarily to construct typologies for our gentrification and displacement map of the greater Sydney region. The ABS provides their census data at various geographical scales. We chose to perform parts of our analysis at the Statistical Area Level 2 (SA2) geography because of the higher data availability at this level. SA2s are slightly larger than a United States census tract. We learned that the literature regarding gentrification in Australia tends to go beyond just the neighborhood level—seen in Australia as a smaller grouping of blocks, such as at the Statistical Area Level 1 (SA1)—and instead portrays the situation at a larger scale, such as at the SA2 or Local Government Area (LGA) levels. While this larger area tends to be used when analyzing gentrification in Australia, we will continue to use the methodology that the Urban Displacement Project has set in place in order to continue at a neighborhood level.

We compare our data at the SA2 level against data at the regional level, which we consider as SA2s wholly or partially in the Sydney metropolitan area per the 2016 Urban Centres and Localities (UCL) definition provided by the ABS and based on the 2016 census.⁵¹ Australian researchers do not typically break the region into subregions for analysis of gentrification and displacement, because the region's single main economic center is Sydney's CBD, around which all housing and transportation has historically been planned.

A gap that we have in our data is the lack of correspondence, or the Australian equivalent of a census tract crosswalk, for the census years preceding 2011. Because of this, the analysis we provide is specific to the years from 2011 and 2016. We believe a much richer story could be provided if there were data that we could accurately analyze using similar geographies as our case study areas, however this is not possible at the time of writing this report. Instead, we build our historical perspective through published literature and key informant interviews.

In the typologies table in the next section, we describe the census variables we used to define different aspects of our gentrification and displacement typology.

Twitter

We compiled approximately seven million geotagged tweets in the Sydney metropolitan area from the Digital Online Life and You (DOLLY) Project at the University of Kentucky. These tweets span the years 2012 to 2016 and were used to suggest gentrification patterns.⁵² We

⁵¹ UCL boundaries are drawn using SA1-level geographic areas that represent “concentrated urban development with populations of 200 people or more,” identified using “objective dwelling and population density criteria” and developed with data from a given census.
[https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/1270.0.55.004~July%202016~Main%20Features~Urban%20Centre%20and%20Locality%20\(UCL\)~3](https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/1270.0.55.004~July%202016~Main%20Features~Urban%20Centre%20and%20Locality%20(UCL)~3)

⁵² Chapple et al. 2020

identified the educational attainment for the SA2 at the users' home location. We then observed where the individuals from SA2s with high or low levels of educational attainment spent their time tweeting. Our Twitter analysis also used economic indicators like levels of poverty in a similar way. We determined where individuals from SA2s with high proportions of low-income people tweet and where those from SA2s with high proportions of moderate-income people tweet. Finally, by capturing 'outsider' tweets, or tweets that were published from users who do not have a 'home' SA2 within a particular geographic boundary, we determined whether a high number of individuals were visiting from outside the region, which might imply tourism.

This method of geotagged Twitter analysis may provide insight into utilizing social media as an early warning indicator for displacement due to gentrification in the near future. The designation of 'outsiders' can be used to determine a neighborhood's likelihood of facing gentrification by observing whether the outsider is tweeting in an area that is stable and low-income (not experiencing gentrification) but comes from an area that is higher income, more educated, and ethnically homogenous. We also used proxy definitions for a Twitter user's profile by assigning them a value based on where their Home SA2 was located. We used this method to determine where their preferred location was to use social media outside of their home tract.

AirBnB

Inside AirBnB⁵³ provides web-scraped datasets by jurisdiction, which we used both as an indicator of touristification and to demonstrate a loss of long-term lease rental property. Owners of multifamily residences will sometimes rent short-term because of slightly higher profit margins and decreased risk of damages to the property over long periods of time.⁵⁴ AirBnB also poses a risk to renters by removing some types of housing from the private market. We utilize the presence of AirBnB listings in a given SA2 to determine whether their density (AirBnB listings per SA2) is associated with gentrification in a given area. AirBnB's data can also provide insight as to the number of long-term lease housing that would be taken off the market and put into the short-term lease market through identifying the number of entire homes and apartments available at a given time, and analyzing the number of listings that a particular host has on the website.

⁵³ <http://insideairbnb.com/about.html>; The scrape that our team used was from the November 05, 2019 scrape that can be found here: <http://data.insideairbnb.com/australia/nsw/sydney/2019-11-05/data/listings.csv.gz>

⁵⁴ Australian Housing and Urban Research Institute, 2016, "Technological disruption in private housing markets: the case of Airbnb"

Case Study Selection

Redfern-Waterloo

SA2s: 117031335, 117031338

Sydney's Redfern-Waterloo district provides a better understanding of the relationship between public housing redevelopment and gentrification. This area has historically served as a hub of Aboriginal life within Australia. In the twentieth century, Redfern-Waterloo became the center of the nation's black power movement and pivotal Aboriginal drives for rights and recognition. Historically, it also contained a large stock of affordable public housing; however, successive waves of redevelopment have reshaped the community's built environment. State-led urban renewal programs have torn down or redeveloped public housing estates in Redfern-Waterloo and caused displacement of local residents. This has stirred controversy, leading the City of Sydney to develop a counter-proposal informed with local resident participation. The area appears to be reaching a boiling point in the gentrification process as successive waves of newcomers have already moved in prior to our study period. Although new and proposed housing in Redfern-Waterloo seems to memorialize Indigenous peoples (i.e. naming buildings after activists), the process will likely displace low-income, higher-risk Indigenous households from their homes in public housing units. The rising rental costs of the new units in the community may further exacerbate displacement and exclusion of Aboriginal and low-income people from the area.

Inner West and Canterbury-Bankstown Council Areas - Sydenham to Bankstown Transportation Corridor

Marrickville, SA2: 117021326

Marrickville is often described as an area experiencing the later stages of gentrification. Young professionals began moving to the area in the early 2000s, marking it as a bohemian, hipster paradise.⁵⁵ In this period, the area saw a disproportionate increase in professional-class, high-income, and well-educated households.⁵⁶ Marrickville's local government structure also changed in 2016 when it was amalgamated with other nearby councils to form the new Inner West Council. Its infrastructure and built environment increasingly cater to upper-middle-income young professionals and new families. In 2010, Marrickville drew comparisons to Paddington, another suburb of Sydney that had experienced rapid gentrification in the early 1970s, with real estate agents commenting, "it feels like Paddington in the 1970s. Buy here and double your

⁵⁵ Punshon, Belinda. "The next Sydney hipster suburbs to emerge in 2017-18", Finder.com, Real Estate, <https://www.finder.com.au/top-nsw-hipster-suburbs-to-emerge> September 2019

⁵⁶ Atkinson, Rowland, M. Wulff, M. Reynolds, and Angela Spinney. "Gentrification and Displacement: The Household Impacts of Neighbourhood Change." *AHURI Final Report*, January 1, 2011, 1–89.

money in the next six years.”⁵⁷ Its advanced stage of gentrification, closer proximity to downtown Sydney’s CBD, and location along the T3 transit corridor make it an ideal site to examine as a case study. Additional quantitative and qualitative research sheds light on topics such as mobility, displacement, and gentrification contextualized within a planning lens of transit-oriented development.

Sydenham to Bankstown Corridor (other than Marrickville), SA2s: 120031394, 120031392, 119021363, 119021362, 119021573, 119021574, 119021366, 119011572, 119011571

The Sydenham to Bankstown Corridor extends further west from Marrickville. For the purposes of our research project, this area provides a spatial study of vulnerability to gentrification and displacement. Its location, starting in Marrickville and following along the same transit corridor, has led the state government to target the area for transit-oriented redevelopment. The T3 train line runs between downtown Sydney and Bankstown and is slated for physical station improvements in the near future. Stations between Sydenham and Bankstown will be converted to metro standards with increased accessibility. There are also future plans for a rail line that would connect the center of this line around Campsie to Northern Sydney which could bring even more development and attract more people. The Canterbury-Bankstown Council in the corridor’s western section is also home to some of metropolitan Sydney’s last affordable rental properties. This area’s housing stock currently lacks aesthetic appeal, which invites top-down redevelopment and improvements to the built environment. The Sydenham to Bankstown Corridor has also been identified as experiencing higher levels of socioeconomic disadvantage based on the ABS’s Socio-Economic Indexes for Areas (SEIFA). Given this report’s focus on low-income renters, studying the Sydenham to Bankstown Corridor provides a close examination of an area that may be at high risk of gentrification and displacement.

⁵⁷ Chancellor, Jonathan and Stephen Nicholls, “Arise Marrickville, the new Paddington”, The Sydney Morning Herald, <https://www.smh.com.au/national/arise-marrickville-the-new-paddington-20100205-niqx.html>, 2010

Typology for Gentrification and Displacement

Our typology for gentrification and displacement draws from the Urban Displacement Project's typology for San Francisco, Atkinson et al.'s typology for Sydney from 2011, and SEIFA from the ABS, which identifies relatively disadvantaged areas.

Figure 1. Gentrification and Displacement in the Sydney Metropolitan Region, 2011-2016.

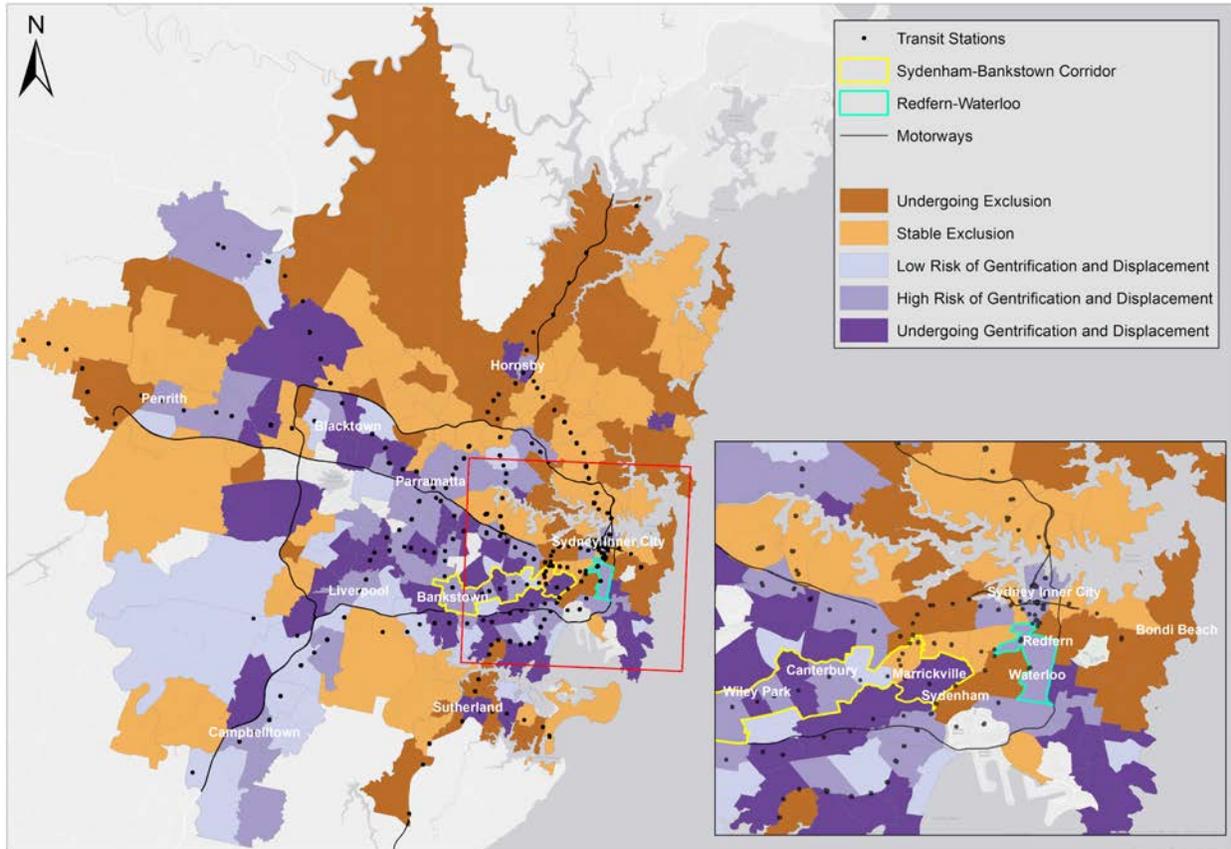


Table 1. Gentrification and Displacement Typology

Typology	Criteria
Undergoing Exclusion (Moderate- to High-Income)	<ul style="list-style-type: none"> • Not a Low-Income Area in 2011 • Classified as Losing Low-Income Households from 2011-2016
Stable Exclusion (Moderate- to High-Income)	<ul style="list-style-type: none"> • Not a Low-Income Area in 2011 • Not classified as Losing Low-Income Households from 2011-2016
Low Risk of Gentrification and Displacement (Low-Income)	<ul style="list-style-type: none"> • Low-Income Area in 2011 • Not classified as High Risk in 2016 • Not classified as Undergoing Gentrification and Displacement from 2011-2016
High Risk of Gentrification and Displacement (Low-Income)	<ul style="list-style-type: none"> • Low-Income Area in 2011 • Classified as High Risk in 2016 • Not classified as Undergoing Gentrification and Displacement from 2011-2016
Undergoing Gentrification and Displacement (Low-Income)	<ul style="list-style-type: none"> • Low-Income Area in 2011 • Classified as Undergoing Gentrification and Displacement from 2011-2016

Low-Income Area in 2011

Defined as SA2s where the percent of households with low incomes in 2011 exceeds that percent in the region’s median SA2 in 2011 (41.4 percent). We consider households as earning a low income if their income fell in the bottom 40th percentile for the Sydney metropolitan region. The nearest census income breakpoint inclusive of the bottom 40th percentile captures households earning less than \$1,250 per week (2011 Australian dollars). More accurately stated, our variable for the bottom 40th percentile extends up to the bottom 42.6 percent of households by income in the Sydney metropolitan region in 2011.

High Risk in 2016

Defined as SA2s where (1) the percent of occupied dwellings that are rentals exceeds the regional median SA2 percent in 2016 (33.4 percent) *AND* (2) the unemployment rate exceeds the regional median SA2 unemployment rate in 2016 (5.24 percent).

Undergoing Gentrification and Displacement from 2011-2016

Defined as low-income SA2s that were “losing low-income households” and that experienced at least one of two “gentrification indicators” between 2011 and 2016.

Losing Low-Income Households

This variable was calculated using the absolute difference in the number of low-income households from 2011 to 2016. Accounting for inflation, a household earning approximately the bottom 40th percentile weekly income in 2011 (\$1,250) would earn \$1,372 in 2016 per the Reserve Bank of Australia. In 2016, the nearest census income breakpoint inclusive of \$1,372 also included households earning up to \$1,500 per week, capturing 42.4% of households in the region. Because the Australian census's income breakpoints do not allow direct comparison, even after adjusting for inflation, and because the region experienced substantial growth overall between 2011 and 2016, we defined "loss" by comparing the absolute difference in the number of low-income households from 2011 to 2016 against a subregional median. Namely, the median change in the number of low-income households during this period in low-income areas was an increase of 118, and the median change in the number of low-income households during this period in high-income areas was an increase of 68. Low-income SA2s with a change in low-income households of less than +118 (including as low as -562) were characterized as "losing low-income households," and high-income SA2s with a change in low-income households of less than +68 (including as low as -365) were characterized as "losing low-income households."

Gentrification Indicators

- (1) SA2s where the percent change in the percent of adults age 25 years and older whose highest educational attainment is a Bachelor degree or higher exceeds the regional median SA2 percent change from 2011 to 2016 (+11.6 percent).
- (2) SA2s where the percent change in the percent of adults age 15 years and older whose occupation is Manager or Professional exceeds the regional median SA2 percent change from 2011 to 2016 (+3.4 percent).

Regional Trends

Based on our typologies, 19.2 percent of SA2s across the greater Sydney are Low-Income areas currently Undergoing Gentrification and Displacement and 19.6 percent are at a High Risk of Gentrification and Displacement. Just 10.2 percent of SA2s are classified as Low Risk. 24.9 percent are Moderate- to High-Income areas currently Undergoing Exclusion and 26 percent are experiencing Stable Exclusion. Areas classified as High Risk of or Undergoing Gentrification and Displacement tended to be clustered in the inner- and middle-ring suburban tracts across greater Sydney. These suburbs closely follow many major motorways and train lines (Figure 1). Areas closer to the Sydney CBD were mostly categorized as either Undergoing or experiencing Stable Exclusion, with a notable exception being the Redfern-Waterloo community. Other exclusive areas were concentrated to the north and northwest of the CBD across the Parramatta River, immediately east of the CBD at Bondi Beach, in the far-western suburbs surrounding Penrith, and in the southern suburbs near Sutherland.

See Tables 3-9 in Appendix IV to see the distribution of these factors and indicators organized by each of our case study areas. The Sydney UCL is also included as a reference point.

Quantifying Gentrification and Displacement in Case Study Areas

Redfern-Waterloo

Between 2011 and 2016, Redfern-Waterloo did not appear to lose low-income households on net, disqualifying the area from our typology of “Undergoing Gentrification and Displacement.” Instead, our quantitative assessment paired with our qualitative findings described in the section below give us cause for concern that the area faces a “High Risk of Gentrification and Displacement” in the future.

While 34 percent of households rented their home in 2016 across the Sydney metropolitan region, a remarkably high 66 percent of households in Redfern-Waterloo are renters. Although some of these renting households have social and affordable housing accommodations (approximately 14% of total households), many low-income households are vulnerable to private market volatility. One consequence of a high share of households renting is high mobility, and this data is particularly troubling in Redfern-Waterloo. Among 2016 residents of Redfern-Waterloo, 70 percent had lived in a different home 5 years before, compared to 43 percent across the region. Further, 33 percent had moved even within the last year, compared to 16 percent across the region. Rental tenure, as we detail in sections to come, makes housing incredibly unstable for the residents of Redfern-Waterloo.

The underlying social and economic composition of Redfern-Waterloo’s residents also increases their risk in the face of gentrification and displacement pressures. Redfern-Waterloo’s unemployment rate was 7.3 percent in 2016 compared to 6.1 percent in the Sydney UCL and 5.2 percent in the region’s median SA2. Unemployment places residents at higher risk of eviction and displacement when compounded with housing stress. In addition, the district’s percentage of Aboriginal residents decreased between 2011 and 2016 even though the area as a whole experienced a surge in population. This indicates pressure on the area’s Indigenous community, and stands as a potential marker of gentrification and displacement risk.

Sydenham to Bankstown Corridor

Between 2011 and 2016, almost all districts along the Sydenham to Bankstown Corridor were either “Undergoing Gentrification and Displacement” or at “High Risk.” This area has a much higher concentration of low-income households than our other case study communities and the greater Sydney region. Nearly 60 percent of households on the Sydenham to Bankstown Corridor have a bottom 40th percentile income compared to less than 50 percent of households in all other case study areas and the Sydney UCL. Rising rents along the corridor could have devastating impacts since households’ low income leaves little room to accommodate increases in the cost of housing. The Sydenham to Bankstown Corridor also has an above median unemployment rate (9.36 percent compared to 6.10 percent for the Sydney UCL). A higher rate

of unemployment could increase the risk of forced relocation despite the area's relative housing affordability. Households in the Sydenham to Bankstown Corridor do not have higher degrees of household mobility compared to the Sydney UCL. However, Marrickville households have slightly elevated one-year and five-year mobility rates. This may reflect westward movement away from Marrickville that our research uncovered. Over time, households from suburbs closer to the CBD like Marrickville may be pushed further and further west along the Sydenham to Bankstown Corridor, thus creating a ripple effect as rent prices escalate.

Drivers of Gentrification and Displacement in Metropolitan Sydney

What are the main drivers of neighborhood change in Sydney? How are gentrification and displacement manifesting?

Our qualitative analysis of the factors driving gentrification and displacement in Sydney yielded two broad categories: public sector and private sector actions. Because both of our case studies center around public investments, our interviewees frequently referred to a pattern whereby the state government announces plans for future public investment followed closely by private actors making speculative investments nearby. Independent of targeted governmental investment, interviewees also described structural conditions that have amplified private investment in and commodification of Sydney's housing market, as well as long-standing private rental market activities that destabilize housing for low-income renters.

This section explores the ways both public and private sector actions contribute to gentrification in parts of Sydney as well as the displacement of low-income households. We begin by describing the state and local government actions our interviewees highlight that directly and indirectly influence gentrification and displacement. We hone in on the specific public sector actions relevant to each case study area—first the Waterloo Estate Redevelopment in Redfern-Waterloo and second the Sydenham to Bankstown Urban Renewal Corridor. Next, we provide details on important private sector factors that contribute to housing instability and neighborhood change: limited protections for low-income renters, land speculation and housing commodification, and touristification of housing.

State and Local Government Actions

Recent catalyzing moments for gentrification and displacement in Redfern-Waterloo and along the T3 line from Sydenham to Bankstown have emerged around the NSW state government's issuance of two redevelopment proposals. In both cases, community organizations, local government councils, and academic research groups contested top-down plans from the state government. However, even as planning processes undergo challenges, pauses, and revisions,

several interviewees report that much damage has already been done in these communities. Existing residents face large imbalances of power and capital that stand in the way of them guaranteeing a future affordable home for themselves in their current communities.

Interviewees situate state-issued redevelopment proposals within a history of other redevelopment programs that led to public housing sell-offs, the introduction of higher-income residents to a historically low-income community, and the modification of a district's urban form. Because public housing and transportation are organized at the state level, the state government has strong planning powers, which it uses to actualize its political agenda on urban space. One interviewee, a professor of urban geography, uses the example of public housing to describe the state government's power and agenda:

In the public housing space...what we see over the last 15 years is a very targeted and strategic kind of move [by the state government] to redevelop these big estates all over, starting at the edge of the city, and they just literally move in.

This quote highlights the concept other interviewees discussed relating to "state-sponsored gentrification," whereby decision makers in the state government see political opportunity in "cleaning up" districts to attract new investment.

Waterloo Estate Redevelopment

In 2015, the New South Wales state government approved plans for a new Metro station in the Waterloo district in the City of Sydney—the local government area at the center of the metropolitan region. The state had also considered a station at the University of Sydney to the west, which would have had "more patrons" and "been a more economic line," according to a local government official, but state officials chose Waterloo for the opportunity to redevelop the public housing estate surrounding the proposed station. The local government official believes the state acted with "good intentions to upgrade or replace the housing, which was in a state of decline," as part of the state's Communities Plus policy. Yet a housing policy advocate provided a different opinion on the state's decision:

There's also some level of almost racial policing in the area...drugs and antisocial behavior get a lot of play in tabloid media and can drive government policy to a great degree...Politically, again, there was great pressure to redevelop The Block area because it had a bad reputation. It had been the subject of some riots earlier in the 2000s. And so there was pressure, I think, from government to do something more productive.

According to the housing policy advocate we interviewed, negative public perception of the area led to political pressure for top-down redevelopment.

As part of the state's Communities Plus policy, a key goal of the Waterloo estate redevelopment involves introducing higher-income residents to form a new mixed-income community. The

Waterloo estate houses about 2,000 low-income households in social housing dwellings, and in 2011 across the Waterloo district more broadly, 47 percent of the district's 8,000 households earned incomes in the bottom 40th percentile regionally. Several interviewees cast doubt on the social theory and evidence underpinning mixed-income redevelopment. One housing policy expert stated, "governments here seem to magically think that areas work better if they're mixed socially...and there's absolutely no evidence to underpin that." A local government official similarly told us, "in English-speaking countries, there's been a spread of this idea of mixed-tenure estates because they give the tenants who are living there the everyday example" of well-off neighbors, "and by some kind of osmosis, the social housing tenants become the same." The official acknowledged some good (e.g., to local schools, streets, and parks) can come from the stronger social and political capital higher-income residents bring to mixed-income communities. Yet the official also shared the Waterloo residents' point of view, reporting:

What they really worry about is that the community network will be destroyed by the replacement mechanism, but also overcome by being a minority in their own land...They're quite doubtful and fearful of a mixed tenancy arrangement.

Multiple interviewees discussed the emphasis that the state government has placed on limiting the social and affordable share of redeveloped housing to 30 percent, using the remaining 70 percent as private housing for higher-income residents to subsidize lower-income residents. One housing policy expert explained, "In [the] Australian context, that 30 percent, it's got a bit of a magic quality to it...Governments...use [30 percent] as a sort of, 'we don't need to provide any more than that'...So it could be 50 percent if we need more social housing...but we have never officially endorsed a measure of need to drive those decisions." Our local government interviewee also noted, "30-70 is really an economic requirement. So to redevelop—to demolish houses and rebuild them and to have that paid for by all the other houses—it takes approximately a 70-30 mix to make that more or less feasible, depending on the particular housing submarket you're in and the cost of land."

In order to achieve their desired financing scheme, the state government proposed more than tripling the existing density of the estate—a density that "is unmatched in the Australian experience," according to our local government interviewee—with a mix of towers and lower-level buildings. The redevelopment would involve demolishing and rebuilding the existing 2,000 social housing units, adding about 200 affordable housing units, and introducing almost 4,500 private housing units. Upon completion, the Waterloo estate would have tripled in density, with the share of households on the estate with low incomes falling from 100 percent to just 30 percent. Furthermore, across the entire Waterloo district, the addition of 4,500 high-income households over the 2011 count would reduce the share of households with low incomes from 47 percent to 30 percent. Yet, as the local government interviewee put it, the high value of views and light available to tower residents "meant that it was most likely that the market housing was going to be in the towers and the social housing was going to be in lower buildings around the towers." Besides the clear inequality of this arrangement, the interviewee also explained that the proposed development's higher densities and reduced park space would create a heat island

effect, leading current social housing residents to see higher energy costs without added financial capacity to afford these bills.



Source: #WeLiveHere2017. <http://www.welivehere2017.com.au/>.

things.” One particularly poignant response that multiple interviewees touched upon was the #WeLiveHere2017 participatory art and documentary film project. As part of this project, a filmmaker worked with current residents of Waterloo’s social housing towers to install colored lights in their windows, allowing them to indicate their opinion about emerging redevelopment announcements in real time. The professor expressed that the project made the buildings “come alive with feelings,” emphasizing that the estates were important sites of culture and personal history, not just collections of physical structures.

As a formal response to the state’s proposal, the City of Sydney Council approved a counter-proposal that reverses the “magic” 70-30 split, reducing the site’s density and allocating 50 percent of units as social housing, 20 percent as affordable, and only 30 percent as private. Yet because this mix breaks from the state’s directive, the local government has had to shoulder much of the responsibility for making the figures for their counter-proposal pencil out. This “conundrum,” as the local government interviewee has called it, has raised concerns for the state government and housing developers. A former developer warned, “Noting that the council wants certain outcomes, that will now make it very, very difficult for the social housing development to proceed. You could do a 50-50 mix...but if you do that, then you need money.” Without additional public funding, the former developer fears a redevelopment with a higher share of social and affordable housing would be financially infeasible. Even so, the local government remains committed to finding a way to make their plan work, and the official described seeking less expensive renovations over demolition and replacement, as well as more innovative design mechanisms that would lower both costs and impacts for the existing residents.

Regardless of whether the state government’s proposal or the local government’s counter-proposal proceeds, everyone seems to agree that the redevelopment project will fundamentally change the district. Both plans aim to retain a similar number of existing social housing units in their final form. Yet the disruptions to the existing community during the redevelopment process and both governments’ mixed-income vision for the district’s future mean some level of gentrification and displacement is guaranteed. As shown in our map of gentrification and

displacement (Figure 1), Redfern-Waterloo qualifies as an area at “High Risk of Gentrification and Displacement,” reflecting through data our interviewees’ concerns about the future impacts of public sector actions in the district.

Sydenham to Bankstown Urban Renewal Corridor

In 2015, as New South Wales announced plans to construct the Sydney Metro along the existing T3 heavy rail train line, the state government also issued a rezoning proposal along the line between the suburbs of Sydenham and Bankstown. The route spans two local government areas—formed by council mergers in 2016—Inner West Council and the City of Canterbury-Bankstown. While these council areas have historically housed low-income and immigrant communities in smaller buildings along a slower train line, the state government’s plans would make these council areas more “desirable,” as multiple interviewers noted, threatening to make rents unaffordable to existing residents and lead to significant displacement. As a regional planning official summarized,

[The Sydenham to Bankstown Corridor redevelopment project has] been quite a political and controversial process, because a lot of developers saw that there was a huge opportunity to redevelop into high-rise and much more dense development along there. And one of the issues, or the key issue actually, from along that corridor is the issue of displacement and dislocation of the existing community, which is quite diverse—it's quite multicultural. A lot of low-income households...moved there, perhaps because it's a cheaper part of Sydney to relocate to, and because access has been a little bit less than other parts and has been seen as a little bit less desirable than some other parts of Sydney. The rents and the property prices have been lower. And this kind of set off a lot of interest from developers [thinking] that they could actually make quite a lot of money out of this area. So there was quite a strong community reaction to that initially.

The state’s top-down proposal for redevelopment immediately became a major source of controversy, seeming certain to attract investment geared toward higher-income households and displacing current residents.

Indeed, districts within Inner West Council, such as Marrickville, have become flashpoints for gentrification over the last several decades, and they remain at risk of further displacement. As identified in the census data (see Figure 1), Marrickville qualifies as “Undergoing Gentrification and Displacement” between 2011 and 2016, having lost 51 households earning in the bottom 40th percentile regionally while the median low-income area added 118 low income households. Marrickville appears to be continuing on a trajectory our interviewees began observing well before our study period. One local government official from Inner West told us, “The Inner West Council area, as a whole, has experienced the most rapid increases in housing prices—both rental and purchase—over the last 10 years or so. So, in the Inner West in particular, those housing prices...have [become] higher than experienced in other areas of the Greater Sydney

region.” As the regional planning official described it, “In Marrickville and in the Inner West...gentrification's been known. That's a desirable place so people who've been renting, creatives and things like that, more of them are finding it harder to stay there.”

While Canterbury-Bankstown has not yet experienced the intensity of gentrification and displacement that Inner West has already experienced, the risk in this local government area is the loss of a diverse and particularly vulnerable community. The regional planning official described Canterbury-Bankstown as “very multicultural” and a “diverse area in terms of the population,” in which households experience “a high level of renting.” The official elaborated that “the threat is that new accommodation will come, [and] even if it is rental, it will be let at much higher values, and those economic forces will push people out.” Our map of gentrification and displacement (Figure 1) highlights two areas along the T3 line in Canterbury-Bankstown that were “Undergoing Gentrification and Displacement” between 2011 and 2016—Belmore-Belfield and Wiley Park—while nearly all other districts appear to be at “High Risk.”

Just as the state’s proposal in Redfern-Waterloo generated passionate responses from a variety of sectors, groups, and individuals, so too did the state’s proposal for the Sydenham to Bankstown Corridor. However, our interviewees tended to describe important differences with regard to the political organizing capacity at baseline in the Inner West versus Canterbury-Bankstown, which could have repercussions for how each council area responds.

First, in the Inner West, interviewees tended to describe the residents as more “vocal” and “active” politically, with a divide between those who espouse anti-development views and those who are proponents of inclusive development with guaranteed affordable housing. Regarding residents’ response in the Inner West, a local government official explained, “there have been...the formation of some local action groups, [like] the Save Marrickville Action Group, and the membership of these groups is quite considerable...They have been very actively engaged in having input into proposed developments, as well as the Local Housing Strategy and Local Strategic Planning Statement.” However, the perspective and aims of community groups in the Inner West vary substantially, with some pursuing “anti-change” agendas hoping to maintain the “character” of their district, and others advocating for more affordable housing development and tenant protections.

Second, in Canterbury-Bankstown, interviewees described the residents as being less politically active and holding stronger pro-development views, without much focus on affordable housing. The regional planning official and a local government official from Canterbury-Bankstown both recognized that many residents in the council area come from working class and immigrant backgrounds and “are aspiring to become homeowners.” For the regional planning official, those aspirations mean local renters “don’t see protecting the rental side of things” as particularly important, but instead deal with issues of rental affordability and dislocation “on an individual basis...in an atomized way.” For the local government official in the council area, those aspirations “to basically increase [the council area’s] profile economically and increase its desirability as a place to live” mean residents are “a lot more pro-development than they are in Inner West” or at least do not object as vocally to development proposals. The regional planning

official described a lower, but emerging, political awareness in support of affordable housing among low-income renters in the council area:

The awareness of the capacity [among renters] to bring about political change or have a political voice or try and shape what's happening is very challenging. Partly because homeowners are saying, 'We've got a stake in this area. Renters, they come and go.' And perhaps in their own heads [renters] think that too, and therefore their political power is not something that they see collectively.

Yet this official also explained that groups like the Sydney Alliance have been “reasonably effective” at telling low-income renters, “You can have a voice here,” even filling a town hall last year with thousands of residents to advocate for affordable housing.

Supporting many residents’ concerns about the need for affordable housing in the wake of potentially displacement-inducing public investments, academic researchers with the City Futures Research Centre issued a counter-proposal to the state government’s proposal. Several interviewees cited the City Futures group’s prospectus as the defining document in charting an “inclusive” path forward. They expressed a mix of hope after the state granted some local planning powers back to Inner West and Canterbury-Bankstown for land near the new Sydney Metro. However, they also conveyed frustration that more serious national and state action would be needed to produce affordable housing sufficient to prevent displacement in the coming years.

Private Market

Limited Protections for Low-Income Renters

A representative from New South Wales’ Department of Family & Community Services claimed that low-income renters comprise at least 40-50% of the population along the Sydenham to Bankstown Corridor. Our data reflects that this indeed may be the case, as 59 percent of households in these districts were classified as low-income in 2016. 47 percent of households were renters, up from 41 percent in 2011. A large portion of the Corridor’s renters would therefore have to earn low incomes for this to be the case. The representative also explained that a high proportion of this population are first-generation immigrants. Over time, rent in this area has become increasingly unaffordable, forcing renters to pay much more for housing. New waves of renters tend to have higher-paying jobs, and their movement into this area has spurred its gentrification.

The representative from the Tenants’ Union of New South Wales stressed that the current rental market system provides no protections to renters who are forced to move due to rising housing costs. Most rental housing in New South Wales is provided by small, private landlords; these landlords typically offer short leases (6-12 months) and have substantial leeway to terminate leases or raise rents at the end of these terms. Despite a policy in place to balance the interests of landlords and tenants, the system favors one party over the other. This tenants’ rights

advocate added:

The residential tenancy act is the main piece of legislation that people's contracts are set around. Its purpose is stated to be balancing the interests of tenants and landlords, but there's very little recognition that those interests are not two sides of the same coin. There's on one side an interest in having a home, and on another side, a profit motive that are often inconsistent, but [this] also means that people are looking at the problem in different ways.

In some cases, no formal lease or term agreements are made, which further increases risks for renters and exacerbates the stress added by unaffordable rents. A real estate agent from the Inner West mentioned how low-income renters usually need to share their dwelling with other people to afford it. Even within such a sharing arrangement, households often need at least one high-income renter in order to afford a rental. Depending on the arrangement, some roommates may be left without a formal agreement with the landlord. This problem is even more common in share homes where a lack of residential agreements in place between tenants and landlords contributes significantly to housing instability in Inner West, as pointed out by representatives from the Inner West Council. On the topic of share houses, they explained:

Another reflection of the affordability crisis in the area is the increase of [share houses]. [Share houses] have gone up by around 19% in that time, so people are obviously sharing properties or sharing their resources in order to cope with increasing rents in particular...In [share houses], people that are not necessarily related to one another...come together based upon housing need and they form a housing collective in that sense. And in terms of residential tenancy leases and arrangements, that is rather variable within those homes, so it can often mean that there's a degree of insecurity for some of the members of a [share house] based upon a lack of a residential agreement.

Besides the issue of informal rental arrangements and the lack of protections against displacement due to increasing rent, there are no mechanisms in place to stabilize rents in the first place. One interviewee declared that “the rent is dictated by the market.” They further explained that, “once the lease has been signed, what happens to the rent afterwards is dictated entirely by the market and is not in the control of the renter.” In cases where the tenant can no longer afford the rent, landlords usually prefer to retain their tenants, but whether they're able to do so largely depends on if the landlord has paid off the rental property's mortgage. The same interviewee also claimed that once the lease is in place, changes to the rent are very rarely made. Modifications typically occur at the end of the lease and landlords might choose to not extend the lease if the rental market is strong and they can find someone to pay a significantly higher rent. In terms of residential mobility, landlords need to give a longer notice to tenants if they want them to leave as opposed to renters who must only provide a three-week notice before leaving. However, the Tenants' Union representative stressed that New South Wales still maintains a “no grounds eviction policy” whereby landlords can evict tenants without any reason and the tribunal cannot overturn such an eviction.

Besides these issues, low income renters have very little representation and are not typically considered in the redevelopment process. The representative from the Family & Community Welfare department emphasized the need for more community involvement. He added that community groups in these neighborhoods are typically organized around ethnic backgrounds and other interests rather than tenure status. These groups, he further explained, usually help low-income renters within their communities on an individual basis, “in an atomized way rather than as a collective.” He also added that there is not a strong history of renters getting together, even though there are advocates and organizations like the Tenants’ Union dedicated to supporting them. Homeowners tend to dominate the public participation sphere, since they see renters as people who come and go and do not have a stake in what happens in the area. Homeowner and renter communities are in tension due to opposing interests, since the former have largely benefitted from rising property prices.

Amidst all this, things might still be changing for the better. The Tenant’s Union representative claimed:

Politicians are removed from the reality of renting...[but] the leftish parties are starting to recognize renters rights as an area for them to get political gains on. It's not in any organized sense and it's usually at least as much about the political gain as the outcomes for tenants.

This representative also talked about a similar shift in journalism, where new waves of (typically younger) journalists are now becoming victims of exorbitant rents and are hence realizing the need to focus on renters issues. They also stressed the lack of transparency—specifically with respect to data about the security deposit system, which makes protecting renters’ interests more difficult. According to the real estate agent from the Inner West, a shift in policy has liberated tenants from paying the remaining portion of their lease if they wish to leave a dwelling unit before their lease agreement ends (depending on how far they are into the agreement). However, leases signed under the old laws must still be paid in full, which can prove to be very difficult. In terms of the length of leases, the Tenants’ Union representative said that while people want the security that comes from a long-term fixed lease, there is a risk of inadvertently becoming trapped in a long contract.

Speculation and Commodification

Commodification describes the way housing is treated as an asset for capital accumulation as opposed to the value derived from its use as a home. This concept is not unique to the Australian experience; a special 2017 UN report on the financialization of housing points out that 60 percent (\$217 trillion dollars) of all global assets are in real estate, 75 percent in residential real estate.⁵⁸ Foreign investment in real estate has garnered a great deal of attention in Australian academic and media outlets which tend to attribute the change to the increase of

⁵⁸ Farha 2017, “Report of the Special Rapporteur on adequate housing as a component of the right to an adequate standard of living, and on the right to non-discrimination in this context”. Human Rights Council.

people and investment from Asian countries, specifically China.⁵⁹ While it has been easy to blame foreign actors for their role in the housing affordability crisis that has been plaguing Sydney for the past decade, all of these investments are incentivized, almost to a point of open invitation, by the Australian government. Most specifically is the Australian Significant Investor Visa (SIV) pathway which “offers a four-year pathway to permanent residency for entrepreneurial and high net worth individuals willing to make substantial complying investments in areas of the Australian economy that will drive innovation and the commercialisation of Australian ideas.” In other words, high-net worth individuals with millions of dollars to invest in real estate trusts will be fast-tracked into Australian permanent residency, which then brings even greater tax benefits for property-owners. Our research team did not learn of any specific instances of this type of investment within the Sydenham to Bankstown Corridor. However, a former housing developer related a personal experience from an appraisal involving a \$130 million Australian Dollar (AUD) profit after selling a site to a Chinese development firm for \$300 million AUD in St. Leonard’s in North Sydney. Many similar instances dot Sydney, including plans for a 500-apartment complex in St. Leonard’s being purchased for \$121 million AUD through a joint venture with MIRVAC, a publicly listed Australian real estate group.⁶⁰

Academics refute the position that foreign investment is the crux of the problem, stating that it makes up a small portion of real estate investment in Australia. A researcher at the University of Sydney described analyzing capital investments in the Australian housing market:

[We] look[ed] at how much capital was coming and how much capital was in the foreign market and how much was circulating in the domestic investment market. And just that simple calculation—the foreign investors were such a small component...It's domestic investment that forces Australians out of the housing market, not foreign.

This domestic influence on real estate market forces is also not perceived as a particularly new phenomenon, but rather one that falls more in line with Australia’s settler colonial past. This commodification extends into the narrative of indigenous dispossession of land and value and it is deeply tied to land speculation as well. The presence of train transport has been a vehicle for land speculation in metropolitan Sydney for decades. Planning maps indicating groundwork for transportation were used by developers as a way to capture value from parcels of land that surround those transportation networks.⁶¹ A professor of urban geography perceives the property development industry’s interaction with land as one where “land[’s] value is just some

⁵⁹ Rogers, D., Lee, C. L., & Yan, D. (2015). The politics of foreign investment in Australian housing : Chinese investors, translocal sales agents and local resistance. *Housing Studies*, 30(5), 730-748. <https://doi.org/10.1080/02673037.2015.1006185>

⁶⁰ Chen, Olivia. “Ping An Strikes 2nd Sydney JV with Australia’s Mirvac Group”, MINGTIANDI, 2016, <https://www.mingtiandi.com/real-estate/outbound-investment/ping-an-strikes-2nd-sydney-jv-with-australias-mirvac-group/>

⁶¹ Alistair Sisson, Dallas Rogers & Chris Gibson (2019) Property speculation, global capital, urban planning and financialisation: *Sydney Boom, Sydney Bust* redux, *Australian Geographer*, 50:1, 1-9, DOI: [10.1080/00049182.2018.1464365](https://doi.org/10.1080/00049182.2018.1464365)

natural phenomenon.” They believe that in reality it has been a “highly-organized process” where policymakers can “intervene” and academics believe real and substantive change is required. However, the politics of this is fraught and tends to not change because its political economy favors those landed individuals or property developers who have been using the system for their own benefit.

For the Sydenham to Bankstown Corridor this has manifested through wealthier individuals from northern suburbs using the devalued plots of land in the inner-ring as a means to attain more capital. According to a real estate agent who has worked in Sydney’s market for eighteen years, real estate in the Inner West has been “cleaned up,” which leads to higher demand and a subsequent south/southwest-bound shift of peoples’ residential preferences. This cleansing of neighborhoods can be associated with gentrification of a suburb. Cleaning up is, to some degree, what the economic development plan for Canterbury-Bankstown intends to do, thus causing anxiety among regional planners regarding Canterbury-Bankstown’s status as one of the few last bastions for affordable housing in Sydney. Its fate with regards to low-income households worries planners who understand the potential for gentrification and displacement that is coupled with growth. While the Canterbury-Bankstown council has been strident with plans of economic revitalization in order to provide the locale with new job opportunities, there is no plan set in place to address the impending gentrification and presumed displacement. This worry circles back to two mechanisms that allow for housing to be used as a means of accumulating capital: low capital gains taxes and negative gearing.

Low capital gains taxes and negative gearing are mechanisms that, when used in tandem, function to generate wealth for already landed individuals and secure a tax haven for those who can afford one. According to one of our interviewees, housing prices have become a joke “around the barbecue” because of how low the taxes are. This creates an unequal market for low-income individuals, and more specifically first-time home buyers because they have to compete with individuals who already have secured housing and have potentially been using it to generate additional capital. This places people at an even greater disadvantage due to their inability to compete on loan offerings. Because these advantages benefit a population larger than that of low-income renters, the city of Sydney has not been able to generate the political willpower to move forward with addressing this issue. Fundamentally, the renter enables the homeowner’s capital accumulation by servicing a mortgage that generates values for the property owner. However, doing so depletes the renter’s coffers until they move further west to repeat the same cycle.

Under normal circumstances, these inequities would slowly simmer, as this is a global trend and not necessarily one that is under-documented across academic circles and media outlets. With the COVID-19 outbreak, these inequities have come to the surface much more quickly as tenants right’s advocates scrambled to set in place policies that would protect renters in the face of unemployment and shelter-in-place ordinances. One such advocate lamented over the privatization and commodification of housing in Sydney, saying the primary issue behind this crisis is that landlords who own one or two properties will have a difficult time responding to

requests for rent reduction because they are “mortgaged to the hilt,” and thus, “rely on the government... essentially government welfare, to pay for their investment decisions.”

Touristification and Emphasis on Investment

AirBnB has grown rapidly between 2009 and 2019. Within this decade, over thirty-five thousand AirBnB listings have been made available in Sydney from twenty-seven thousand hosts in November of 2019. In a report that documented the experiences of hosts in Sydney, the Australian Housing and Urban Research Institute (AHURI) describes the incentives for choosing AirBnB tenants over long-term leases. The report notes that rental housing is typically underutilized, whether using AirBnB or a different short-term leasing provider. Short-term leases provide a greater return than long-term leases, AirBnB’s system provides a greater level of flexibility in how the property is used (when compared to other short-term leases), and short-term leases are less damaging to the property than long-term leases.

Many (80% of AHURI’s survey respondents) who choose to use AirBnB use it to supplement income rather than using it to cover necessary costs. In our research using Inside AirBnB’s available dataset for Sydney, we found that 2,451 hosts (9% of the total) had two or more AirBnB listings where there were 7,728 listings on the market. Of this group, there were 1,464 hosts that had their entire home/apartments available, including 6,008 apartments and 1,650 houses (Table 2). Marrickville had 20/6,008 (or 0.03%) of these apartments and 12/1,650 (.07%) of houses. The Sydenham to Bankstown Corridor had 62/6,008 (or 1%) of these apartments and 7/1,650 (0.4%) of houses. Redfern-Waterloo had 363/6,008 (6%) apartments and 41/1,650 (2%) of the houses. The Sydenham to Bankstown Corridor stretches far to the west and is directly along the rail lines where the AirBnBs are primarily situated. However, it is still important to note that most of the most popular destinations on AirBnB’s listings are located near the coast and the harbor.

Sydenham to Bankstown Corridor’s density of AirBnB listings was much lower than in Redfern-Waterloo’s, with Redfern-Waterloo having 375 listings per sq/km on average, whereas the Sydenham to Bankstown Corridor only had 53 per sq/km (Figure 4).

Impacts of Gentrification and Displacement for Low-Income Renters

To what extent are gentrification and displacement (disproportionately) impacting low-income renters in the Sydney metropolitan region?

Regional Impact Across Greater Sydney

Our interviews revealed that gentrification and displacement are disproportionately affecting low-income households in Sydney. They spoke of gentrification and displacement in general terms (across the entire Greater Sydney metropolitan area) and on a more localized, suburb-specific scale. Across the region, the increasing cost of housing is resulting in low- and even middle-income households “being forced off of the inner ring” and into areas that lie further from the center city, according to a local scholar of urban studies. Although gentrification often increases the racial and socioeconomic diversity of neighborhoods, this interviewee believes it is creating homogenous zones across the Greater Sydney region, going so far as to say the area is “becoming very spatially fragmented on the basis of class.” Intergenerational transfer of wealth and housing assets has also solidified these boundaries, making it more and more difficult for lower-income households to afford housing in areas closer to Sydney’s center. These increasingly rigid boundaries have negative consequences for low-income Australians.

Our interviews shed light on the social, economic, and emotional costs of gentrification and displacement across Sydney. One scholar felt that “a significant spatial divide around education” has opened up due to perceived income segregation throughout the Sydney metro area. Rather than increase student body diversity, they believe gentrification and displacement are actively imbalancing institutional resources. Inequitable distribution of lower-income households has also meant that suburban schools farther away from the Central Business District lack resources and lag behind in performance.

Private renters often require some form of financial assistance to pay their rent due to their lower economic means and inability to purchase a home. According to a local academic, those who derive a significant amount of their income from government assistance often find themselves “in the most dire situations...because they were using most of their money for accommodation.” The more geographically remote suburbs they live in also lack adequate possibilities for employment. Instead of working close to where they live, low-income households must therefore endure the burden of increased transportation costs and longer commutes to the downtown area, which remains the region’s dominant job hub.

Gentrification and displacement can also have a negative social impact on low-income renters. An urban studies and housing scholar emphasized that a lack of economic security, poor prospects for employment, poor neighborhood services, and longer commutes can cause stress

and anxiety for low-income Australians. The same individual also noted that renters move significantly more frequently than owners, making it nearly impossible for many renters to form social ties within their current communities.

Redfern-Waterloo

Interview participants also talked about evidence of gentrification and displacement within our case study communities of Redfern-Waterloo and the Sydenham-Bankstown Corridor. Redfern-Waterloo has become a place that many believe is at a high risk of gentrification and displacement. Historically, Aboriginal people came to this community from all across the country, established family and social networks, and transformed it into “the urban center of indigenous life in Australia.” Now, its close proximity to Sydney’s CBD and good services linking it to other communities mean that the land there is some of the most valuable in the country, and it has been the site of recent housing and transportation redevelopment efforts. The area also has high concentrations of public housing and has historically always been surrounded by much more affluent areas. Perhaps most importantly, the area’s high population of indigenous residents and large amount of indigenous-owned land compared to other areas in the city tie it to Australia’s colonial legacy. Dispossession of native peoples is a “foundational component of what Australia is,” and has operated as the “modus operandi of Australian real estate” for centuries. Within this context, Redfern-Waterloo must be understood as a complex site where racial tensions and the legacy of Australia’s colonization process continue to play out in the built environment.

Our interview participants spoke of gentrification on two different temporal scales: local-level change that has already taken place within Redfern-Waterloo and the potential future impact that transit improvements and public housing redevelopment will have on the community. According to a local professor with experience working with local residents, outsiders held a negative perception of the area until recently. The attitude surrounding Redfern-Waterloo was bad enough that non-residents were “too scared” to even visit the area. Although this perception negatively impacted the community, it also acted as a shield that prevented influxes of non-residents and insulated against large-scale gentrification. However, this geographical containment and the area’s cultural boundary has become more porous in recent years, allowing more penetration by outsiders. The same professor specifically cited a bike path that cut straight through the public housing estates as a defining instance of Redfern-Waterloo ‘opening up’ to the rest of Sydney. This fits into a relatively recent and ongoing commercial gentrification process. The same academic referenced new, trendy bars, an increase in the cost of basic goods, and more white individuals visiting and walking around the community now than ever before as examples of the area’s change.

Property prices and values for private homes around the public housing estates have also increased by enormous amounts in recent years. A tenants’ rights worker with knowledge of the community stated that private homes close to the Waterloo public housing estate are now being purchased for as much as \$2 million AUD. This rise in housing costs has brought an influx of households with higher incomes and a perceived increase of white residents and outsiders to

Redfern-Waterloo. A scholar interviewed for this report elaborated on the change that has occurred in Redfern-Waterloo:

The impact of gentrification on Aboriginal communities is very, very significant...[Redfern-Waterloo] was really a very strong indigenous community. And that's really been severely undermined, and gentrification in Redfern is incredible. It's become a very, very sought after, very expensive area, because it's beautifully located in walking distance of the harbor. I think there's been a lot of dislocation.

Another interviewee summed up the change that has taken place as the area has gentrified:

If you asked a whole bunch of Aboriginal people that have lived on The Block and grown up there, particularly the young people...they will say...that it's the atmosphere and cultural dynamics of the place that have been fundamentally changed. It's the...change of the vibe on the street that they can't cope with. When you're a young Aboriginal person growing up in Sydney, the whole city is a strange place for you except for Redfern. And when that changes, that's what they find problematic.

The insights from our interviews showed that Redfern-Waterloo has begun to experience gentrification and displacement in larger and more noticeable ways. Its status as a strong focal point of Aboriginal culture may have helped stave off neighborhood change for longer than other inner-city locations in Sydney. However, other aspects that made it unique, like the large-scale presence of public housing and Aboriginal-owned land, may have also acted as a determinant in its targeting for redevelopment. Those interviewed for this report also believe that gentrification and displacement will continue in Redfern-Waterloo; they articulated local fears about the change anticipated from the redevelopment of public housing estates and new transportation links.

Despite efforts to allow current inhabitants (especially those living in public housing and those with Aboriginal ancestry) to remain in the community, our interviewees reported that fundamental aspects of their lives are likely to change as the area undergoes continued gentrification. One anticipated that “every dimension of their life will be changed,” including “their friendship networks...where they buy their local food, the shops in the area, [and] the support services,” thus constituting a new “form of dispossession.” The community’s current and expected transformation is thought to be making the familiar become foreign and strange. Interviewees believe that the neighborhood’s current state will be impossible to maintain moving forward. One participant expressed the community’s stress regarding the unsettled future of their longtime home:

It's a lot of uncertainty...they've been told they're going to lose their homes. They've been told they're going to move. They've been told that they will get to move back. But [there's] a lot of skepticism about that. And rightly so...but it's the

uncertainty of when it's going to happen because it's been coming for years. And people, there's some who kind of cling on to, 'well maybe it's not going to happen, because it hasn't happened yet.'

This uncertainty has stirred emotion within Redfern-Waterloo as its residents watch their community change. Many community members lack trust in the local government to implement a development plan that will not result in their displacement. This creates a significant barrier to the honest communication between the two parties that could increase understanding and resolve disputes within the government's plans for the area.

Sydenham to Bankstown Corridor

The Inner West, a subsection of the Sydenham to Bankstown Corridor, is in the later stages of gentrification and has been experiencing rapid increases in housing prices over the last decade. The housing prices have already changed so rapidly that the Inner West council has seen a fairly rapid decline of individuals under housing stress, defined by AHURI as when the bottom 40th percentile of income earners pay over 30 percent of their income on rent.⁶² The decline of individuals under housing stress has had little to do with the council ameliorating the impacts of gentrification and providing social services. According to a former DA Planner for the region:

What's happened over time as we looked at the data is that [proportion of those in housing stress in the Inner West Housing suburb] is actually decreasing. And we've come to realize it's not because less people are in housing stress, it's because they've had to move out.

One control mechanism that has been used to address direct displacement from this area is a requirement for developers to provide a contribution towards funding affordable housing. In essence, developers would need to contribute a few hundred thousand dollars to building adequate housing for low-income individuals when low-income renters are displaced. The issue with this mechanism, as described by the planner, is that there is no immediacy, meaning that many of the residents would have to find affordable accommodations before the fund actually produces any housing. The Inner West Council is aware of the effects of gentrification, as before the amalgamation, "Inner West was a former working class area...[however] there's not a lot of low-income earners living there now because of increased rents." The council has been working towards building more safety nets for the few working class households that are left in that area.

Due to this affordability crisis in the Inner West, there has also been a rise in share houses according to a housing affordability specialist for the area. Rental housing tends to cater to higher income households in the Inner West. This may lead very low- to moderate-income

⁶²Australian Housing and Urban Research Institute, "Understanding the 30:40 indicator of housing affordability stress", 2019. <https://www.ahuri.edu.au/policy/ahuri-briefs/3040-indicator>

households to decide between sacrificing basic needs in unaffordable housing circumstances or moving farther from the CBD to find more affordable housing.

However, local councils can intervene in the planning process to increase affordable housing supply. For example, the Inner West Council has endorsed an Affordable Housing Policy which supports stronger intervention through the planning system in the form of mechanisms to capture an equitable share of land value uplift, as well as the direct creation of affordable housing on public land through development partnerships. The Inner West Council's Affordable Housing Policy requires a 15 percent affordable housing contribution from major private redevelopments occurring on re-zoned residential land or where amendments to planning controls provide for increased densities. The policy incorporates a threshold of 20 units, or 1,700 square meters of gross floor area to avoid development disincentives occurring on smaller parcels of land. In relation to private developments, this policy can guide Voluntary Planning Agreements between the council and developers involving the sharing of value uplift and resulting in contributions of affordable housing and other public benefits by developers.

Canterbury-Bankstown is in the midst of gentrification in some areas, particularly to the east of the local government area. The Council's affordable housing strategy perceives that there is likely to be increased housing stress, and ultimately the displacement of low-income households in the future. Canterbury-Bankstown is known for being a cultural hotspot and has large pockets of Lebanese, Italian, Greek, Korean, and Chinese people. This ethnic diversity may be used as a way to market their development strategy by bringing in families from outside the area to enjoy food and culture. As an economic development specialist from Canterbury/Bankstown argued:

As time goes on, [Canterbury/Bankstown] will be renowned for its cultural diversity...Some areas are already food destinations, like Campsie [for Chinese food]. Bankstown will build its reputation as being ethnically diverse... And I think they'll leverage off that cultural identity, so it will be more of an economically vibrant place.

This vibrancy has historically been an invitation to gentrification, and while many parts of the Canterbury-Bankstown area are not in the process of being gentrified, this economic development strategy could be the lynchpin for future instances of displacement of low-income renters and families.

The modification to the Sydenham to Bankstown Corridor (i.e., the new metro lines to be constructed) will increase marketability for the region and may increase the potential for gentrification. The approval of these lines is a tacit acknowledgement that the government desires denser housing in these areas and was not well-received by community groups. According to a regional planning official cataloguing neighborhood change and housing policy:

Local communities did get together and object to that. And there was a media campaign and that led the planning minister to perhaps recognize that

community opposition would mean that...people have an idea of what was heading their way.

Ultimately, this sustained community opposition led Sydney's city council to return planning powers to Canterbury-Bankstown's council.

There is recognition among leaders and government officials that their actions will put undue stress on low-income families. Local leadership has decided that the economic growth strategies that are being put into motion will help their communities over time, yet tell us:

As Parramatta develops...[Canterbury-Bankstown] is going to get more expensive and people have to move [away]. And...the issue is people don't know how to deal with displacement...The capitalist model provides an economic incentive to develop...economically. So demand goes up, prices go up. Is it an inevitable model? I guess so. But we're trying to tap back into that private market and ensure that at least a proportion [of new housing] is affordable. And that's what this system is, this capitalist system we're trying to work in, and I think that's the reality of it.

Our next section covers policy recommendations to provide assistance to low-income renters and to help provide affordable housing in Sydney.

Policy Recommendations

“In the Inner West and in Marrickville, they've identified that affordable housing is a real problem. But the resources they have to actually create [affordable housing] are fairly limited and aren't going to do it. So you actually need to inject something more if you're going to have this sort of rapid change, still mitigate that problem, and retain the people who live there.” - Regional Housing Policy & Planning Expert

Housing in Sydney continues to become more expensive and funding for the construction of affordable housing continues to decline. Many interview participants believe that all levels of government need to work together to provide legislative or regulatory processes that explicitly work to eliminate barriers to building and maintaining affordable housing for low-income renters. This section explores the ways that local experts believe national, regional, and local policies could be reshaped to properly address the need to increase the supply of affordable housing.

Production of Affordable Housing

Affordable Housing Financing

Several interview participants discussed the inability to finance affordable housing as one of the largest barriers to increasing and maintaining the supply of affordable housing in Sydney and Australia as a whole. One interviewee with over 30 years of experience working in affordable housing has seen how government intervention in providing affordable and reliable housing has shifted. They noted that:

Funding for affordable housing, from all levels of government, has steadily declined over time even as the national government continues to push for affordable housing to be built and maintained by Community Housing Providers (CHPs) that rely on government funding.

They referenced two reasons that this hinders the provision of affordable housing. First, CHPs have historically had trouble securing funding and technical assistance because they are smaller, may not have the same credit standing, and may not qualify for the same funding streams as larger developers. Therefore, they need funding and technical assistance to obtain loans, grants, or other monetary resources in order for them even to begin developing housing. Funding is also needed to maintain the existing housing stock. The interviewee discussed instances where housing has been turned over to CHPs without any additional support or funding for maintaining the related infrastructure. Many CHPs in this position have had to turn to the private market for support, sometimes in the form of buyouts. According to this participant:

[The NHFIC is] a great start [at addressing the concerns of affordable housing financing], but it is important to note that even with this the CHPs still cannot operate fully or pay back the loans without additional government subsidy.

A local academic who has studied Australian housing policies and programs for nearly three decades agreed that although NHFIC was a good place to start, further governmental assistance would be needed. Through their research they also found that the AHBA portion of NHFIC will only provide part of the funding needed to build and maintain affordable housing; the remainder will still need to be established through further support from all levels of government. However, they did still seem to believe that the NHFIC program could serve as a promising tool to address the issue of financing by supporting “whatever affordable housing projects they can initiate and to build the much needed stock of affordable housing.”

Other interview participants were more skeptical of the national government using NHFIC to further advance its agenda of transferring all affordable and social housing to CHPs. One interviewee stated:

I think there's a bit of a danger because obviously the government is washing its hands of the responsibility. It's a dangerous [debate] because I think it's part of

the neoliberal agenda, so [they've] got to be very careful. It's like a divestment of government responsibility to the private NGOs who control the community and are an artery of the private sector, so it becomes quite tricky.

They also discussed the ways that this might be beneficial to tenants regardless of the actual motivations of the government:

In some instances, for the tenants, it might be better because they are closer to the actual management. Previously in government controlled housing there had been very poor maintenance and response to tenant requests, so I think in some instances, maybe community housing might be more effective.

Regional Goals for Affordable Housing Production

The need for greater government action in establishing goals, plans, and strategies for affordable housing in Sydney and the greater Sydney region was a consistent theme throughout a majority of the interviews. One housing policy expert spoke of the Greater Sydney Council's Affordable Housing Targets ability to act as a catalyst for this type of government action, reasoning that, "if they do it right, we will start to address intergenerational disadvantages in our city by providing greater resources." However, they also detailed the challenges of actually implementing these targets. A primary obstacle is that the targets are set up as more of an "opt in" process rather than a requirement:

If after conducting the feasibility model, the council decides that their preference for their community is to provide more parks than affordable housing, they could do that. They could decide not to pull the money out for affordable housing, which is infuriating but true.

This expert also noted that creating a flat rate regional target for affordable housing might actually be more effective, noting that this would cause less confusion for developers and give all entities involved in housing development a clearer path forward. A second housing policy and governance expert also spoke to the challenges of not having local or flat rate targets, stating:

The Greater Sydney Commission talks about affordable rental housing targets but they don't have an overall global target for each area. This leaves councils to come up with that, but they're nervous that they don't have the means to deliver.

Inclusionary Zoning

Many interview participants who have worked in housing policy in Australia for the last few decades discussed the need for "true" inclusionary zoning mechanisms in order to increase the supply of affordable housing in the Sydney and Greater Sydney region. A housing policy expert referenced NHFIC when discussing this need:

Inclusionary zoning as we may think of it in the US context does not truly exist in Australia. We have tried for years to produce an inclusionary zoning scheme that the government will support. NHFIC is a great starting point, but in order for this model to truly work you almost need to cross-subsidize and balance out low-income with moderate-income in order to truly fund the development and maintenance of affordable housing. If there were truly inclusionary zoning and you were able to house people of different income levels in the same place, you could more easily fund these projects.

With the expansion of SEPP 70, all municipalities in NSW can now prepare affordable housing contribution schemes and amend their local environmental plans to reference them. Several interviewees referenced this expansion of the inclusionary zoning framework. They recognized that this could be beneficial, but also discussed the difficulties of implementation and the limitations that come along with this policy. A housing policy and governance expert who focuses on council collaboration and planning efforts reported that SEPP 70 was NSW's only version of inclusionary zoning and for this reason was a great step forward. However, they also recognized that there were many "hoops for councils to jump through" to prepare and receive approval for their schemes, noting that in the Inner West in particular many local officials have become "very frustrated" with the process. Although there are organizations working to support councils in this process, this participant believed that greater support is needed. They also discussed major limitations to relying on SEPP 70 for all future affordable housing production:

One of the problems with it is that you have to have the development first to get the [affordable housing] contribution and then your affordable housing providers come in second. Instead there could be a more proactive response.

Additional Policy Recommendations

Throughout several interviews, participants offered suggestions for reshaping the policy schemes related to the production of affordable housing. These suggestions ranged from reinstating policies that had previously been terminated, adding stricter provisions to existing policies, and creating increased opportunities for those most impacted by gentrification, displacement, and affordability. In one interview, a former housing developer expressed their belief that the policies passed by NSW are "insufficient" in addressing housing demands and that government officials are not actively working to correct this:

A lot of municipalities say they want affordable housing. The state says it wants affordable housing, but it does nothing to allow it to happen. And in fact, most municipalities spend most of their time opposing affordable housing development, even though they say that they want it.

This participant went on to suggest that governments look into reinstating the National Rental Affordability Scheme (NRAS) that once provided incentives to developers, but has since been terminated. They stated that, "[NRAS] wasn't a perfect policy, but it was a good policy in

reducing some risk for affordable housing because it provided a subsidy to developers to produce affordable housing.” A regional housing expert shared similar sentiments of revitalizing “old” policies by making changes to the regulations within them. One of their suggestions included getting rid of the capital gains tax because it helps those who already have the means to enter into the housing market and hinders those who do not. They also suggested that governments work together to adjust the percentage of affordable housing required from developers so that it is consistent and achievable.

A continuous theme that emerged within several interviews involved increasing national support for local solutions. One interview participant discussed the work of local councils in the Inner West that are actively trying to implement their own tools and mechanisms to increase housing affordability. In this council local planners and policy officials have worked to establish partnerships with local community housing providers to produce new affordable units.

Preservation of Social and Affordable Housing

Community Control of Public Housing Redevelopment Process

The New South Wales state government has repeatedly attempted top-down redevelopment projects (e.g., in our case study areas), which ignore communities on the ground. All our interviewees stressed how the process of redevelopment must include local voices and decision makers.

Australia’s planning process has largely been technocratic. An urban geographer from the University of Sydney explained:

Built into this is the idea of technocratic planning, where planners are experts—they know what they're doing, they've studied to think at this scale, they have the tools of urban design and planning, they know about how social systems work, and we should trust them.

This technocratic process has elicited a negative response from local communities over the years, as community groups self-organize and lobby against inequitable and unjust practices. An official from the City of Sydney explained that Redfern-Waterloo has a high level of self-organization and is politically active. Others interviewees agreed and mentioned numerous plans to dislocate tenants which were met with a lot of public backlash. Aboriginal activism in response to development projects has also been strong over the years.

This backlash and community response necessitated the inclusion of community consultation to dismantle this practice of planning. As a result, some said that planners are continually opening up the planning process and taking community input into account, while others argued that this effort has largely been superficial. The urban geographer mentioned:

Redfern is currently undergoing redevelopment which is controlled by the Aboriginal community through the Aboriginal Housing Corporation. The community is highly involved in the process and divided over development financing mechanisms...cultural competency programs for banks financing development, etc., are necessary to prevent cultural appropriation [and community consultation helps remedy that to some extent].

An official from the City of Sydney explained that local governments are closer to the communities they represent compared to state and federal governments. He added that the Community Plan developed by the City of Sydney involved widespread community consultation. Safety and housing officers from the council work closely with vulnerable communities who otherwise have little interaction with the state government. They help them lobby for better services and give them a voice in the redevelopment process. However, the representative from the Tenants' Union argued that they work more closely with the state government because the local council has little power.

In recent times, CHPs have been given preference for affordable housing projects but receive little government support and face problems with financing developments. All of our interviewees agreed that CHPs tend to be closer to communities, understand their needs better and provide better outcomes in terms of user buy-in. Social housing run by CHPs receives rental assistance from the federal government. CHPs have not been given support to grow even though this is the stated intention of state and federal policies. As a result, they have limited assets and development capability. As a remedy, the City of Sydney is proposing that instead of transferring land to a private developer to redevelop an entire public housing estate, there can be a series of smaller transfers to community housing providers who can complete the process in a gradual manner.

Some of our interviewees mentioned the Communities Plus program as an attempt at giving communities control. The program aims to create a mixed-tenure estate where 30% of the development is social housing and 70% is affordable and market-rate housing. A representative from the GSC argued that this program has achieved better quality housing and offers better community infrastructure and services by virtue of the developments being mixed-tenure. However, an official from the City of Sydney argued that state policy only mandates a minimum of 5 percent affordable housing, which is rarely exceeded.

One of our interviewees mentioned that the local council in the Inner West had implemented a program for reduced-rate rental housing for key workers (essential jobs, emergency services, etc). Although this is only a temporary three-year program, officials in this council hope that this can act as a "stepping stone to help people save and then enter the private rental market or buy a home on their own." They have also worked to acquire properties through voluntary planning agreements to provide affordable housing and expressed optimism that pairing this program with the recent expansion of SEPP 70 could help to increase their portfolio of affordable housing units.

Similarly, one housing policy expert expressed optimism for future policy implications, suggesting that new development might present new opportunities to support those most vulnerable to displacement:

If we get it right, we can create new jobs alongside development. We could work to provide opportunities for those most vulnerable to these changes. There are targets for local hiring and requirements for land or housing units that must be given to Indigenous communities. There could be incentives to produce policies and programs that provide job training, educational support, [and] community centers so that from a very early age, individuals could get good education and training. This way, they will actually be able to enter the new jobs that will be created by increased development.

Tenant Protections

The lack of adequate protections for tenants constitutes a significant barrier to ensuring housing stability for Australian renters. Existing legislation like the residential tenancy act has failed to balance the divergent interests of landlords and tenants. This piece of Australian housing law fails to provide stability for renters because it is steeped in a system geared towards profit instead of the use value of a home. Australian citizens also have a “limited imagination...around housing” due to the nation’s longstanding neoliberal approach to housing policy. A local tenants’ rights advocate explained that “it’s very difficult to talk to people about things that could be [changed] because they are so used to the way things are...so weighted against tenants’ interests.” This attitude has been an enormous obstacle in passing progressive legislation for tenant protections, which means that stronger anti-displacement policies have been slow to develop.

Most residential leases are only offered for very short lengths of time: usually for no more than six months to one year of occupancy. After the initial term is complete, landlords have virtually uncontested ability to evict tenants without providing a reason. These “no-grounds evictions” only require a 90-day written notice before a household must vacate. Government bodies like the New South Wales tribunal do not have the ability to reverse or contest no-grounds evictions, essentially condemning households that receive eviction notices to forced moves and continued poverty.

However, advocates continue to push for improved tenant protections in the face of these barriers. A moratorium on no-grounds evictions would form a strong basis for increasing the rights and security of Australian renters. The tenants’ rights worker suggested that such a moratorium has been put on the table and is being pushed for. In a sharp turn away from its previous stance, government actors are actually considering a temporary eviction moratorium (partially due to the coronavirus crisis), which represents a huge step forward for tenants’ rights in Australia. Advocates and renters hope that a stay on such evictions could eventually become permanent through negotiations after the crisis ends.

Our interviewees also spoke of policies that could protect tenants from unscrupulous landlords and forced displacement. A housing scholar at a local university and a tenants' rights advocate both emphasized the need for legislation to control rent burdens and rent hikes. Ideally, rent payment would be a cost that "adjusts with your needs" and would be dictated by objective standards like the Consumer Price Index so that households are not overly burdened by housing costs. Legislation could also mandate that rents are only allowed to be increased once per year instead of the current unregulated system. More radical ideas put forward included implementing a system of wiping away renters' debt and delivering support payments to very low-income households to help them pay for the cost of housing and other basic needs.

Interviewees disagreed about the ideal length of rental leases. One participant advocated in favor of longer-term leases to increase security for tenants. However, another cautioned against extensions of lease terms due to concerns over landlords potentially harassing tenants. This difference of opinion likely stems from concerns over the current hostile environment that Australian renters face where harassment and illegal practices are hard to counter. What is clear is that Australian tenants face a host of difficulties in regards to their housing costs and potential for forced mobility.

Considerations

COVID-19 Crisis

Overview

COVID-19 was first confirmed in Australia in late January 2020. As of May 14th, there have been nearly 7,000 cases in total, and 98 people have died from the virus.⁶³ Australia restricted international flights from high-risk areas in February, and as the number of cases soared in late March, all bars, clubs, cinemas, gyms and places of worship were closed indefinitely, while restaurants and cafes were restricted to take-away only. Supermarkets, clothing stores, chemists and beauty salons were allowed to remain open. By the end of March, authorities imposed stricter social-distancing rules, limiting public gatherings to a maximum of two people. People were urged to stay home and only go out if it is absolutely essential. As of May 1st, Australia has begun easing travel restrictions as public health officials announced that Australia has successfully flattened its infection curve.⁶⁴ Unfortunately, the COVID-19 crisis will have a lasting socioeconomic impact which may exacerbate pressure on low-income renters and heighten the risk of displacement in Australia, as discussed later in this section.

⁶³ Australian Government Department of Health. <https://www.health.gov.au/news/health-alerts/novel-coronavirus-2019-ncov-health-alert/coronavirus-covid-19-current-situation-and-case-numbers>.

⁶⁴ The Print 2020 <https://theprint.in/world/australias-most-populous-states-start-easing-covid-19-lockdowns/418708/>

Impact on Housing Market

While the beginning of 2020 was marked with concern over raging wildfires in Australia, focus soon shifted to a dire world health emergency. “COVID’s had a much larger impact than the bushfires in shifting the economy and impacting the entire population instead of localized pockets,” said a representative from the Tenants’ Union of NSW. They further added:

These kinds of crises don’t break anything. They just show what’s already broken. We have a system of housing in general that is not set up for providing housing, it’s set up for profit generation and wealth generation...Without it being ever a decision made at any level, we essentially privatized housing over the last 200 or so years.

An academic from the University of Technology, Sydney echoed this sentiment and added, “COVID-19 has further necessitated providing affordable housing as accommodation is absolutely crucial.”

The pandemic has caused mass job loss as everyday life all over the world has ground to a halt. Our interviewees told us that the government’s attempts to provide monetary relief are not going to be enough. A real estate agent from the Inner West said, “it’s inevitable that people might not be able to pay their mortgages even after the pandemic is over. Prices are going to drop and it will be a buyer’s market.” As renters lose jobs, they are asking their landlords to decrease their rent. Those unable to negotiate payment adjustments, the real estate agent added, are either moving out to cheaper, farther-flung neighborhoods or are moving back home. Enacting a rent moratorium is difficult since landlords will lose properties if the banks don’t come on board. Rent negotiation is an option that the government is advocating for, but landlords might lose their insurance if they negotiate a lower rent. The representative from Tenants’ Union added:

One of the issues that has come up in COVID is the not for profit housing industry’s complete inability to cover rents for any meaningful period because they don’t have the asset base. They don’t have an approach, they don’t have the backing of a state to be able to [do that].

Some of the interviewees said one of the unintended positive consequences of COVID-19 will be that it might slow down gentrification due to development grinding to a halt. Another unintended positive impact might be that there will be a market recession which will discourage private developers from transferring their government-subsidized affordable units to the market.

Decline of AirBnBs

According to AirDNA, an online rental analytics firm, new bookings on Airbnb are down 85 percent and cancellation rates are close to 90 percent. Revenue generated by Airbnb’s platform in March was down 25 percent year-on-year, wiping out \$1 billion in bookings. Airbnb has secured commitments of \$1 billion for a syndicated term loan from institutional investors, as the

coronavirus travel freeze continues to hammer vacation rentals. In recent weeks, Airbnb has faced anger from hosts faced with a wave of coronavirus-induced cancellations and refunds after it made a policy change last month to allow guests to be refunded in full for bookings over the coronavirus period. It later earmarked \$250 million to help hosts impacted by these cancellations.

There have been reports of an increase in long term rental properties in some markets, such as London, as professional landlords operating on platforms like Airbnb look for an alternative revenue stream for empty vacation rentals that are now costing them money.

Bushfires

Australia's vulnerability to climate change has been evinced by recurrent droughts, bushfires, rising sea levels, and extreme weather events such as heat waves. Fires pose significant but largely unmeasured risks to people and their property. Climate change is predicted to elevate risk to human and other assets through a weather driven increase in area burned, as was seen in the 2019-20 bushfire season.

The 2019-20 fires ignited two months earlier than usual and the flames tore through an area about the size of West Virginia²⁹—killing at least 20 people, destroying 2,162 homes,⁶⁵ shrouding cities in choking haze and stretching firefighters to a breaking point.⁶⁶

These fires had disparate impact due to localized affected pockets, and although destructive, were not as widespread as COVID-19. Besides the smaller scale, the temporality of the bushfires also helped decrease impact—people see the bushfires as something that happens every year. It did bring up issues related to renters rights, however these discussions could not be translated into broader reforms.

Policy Recommendations and Conclusions

By examining how the above interview findings and quantitative analysis work to answer our initial research questions, we offer the following recommendations and conclusions.

Policy Recommendations

In order to create equitable economic prosperity and opportunity for all Sydney residents, there must be improved coordination between all levels of government, especially at the local and state level. More cooperation can help proactively create policies and set feasible and community informed targets for the future. Governments must work collaboratively with the

⁶⁵ Fink (2020)

⁶⁶ Wright (2020)

private sector and community advocates to implement policies and practices that seek to preserve, protect, and produce affordable housing for low-income renters.

Preservation

Current approaches at preservation of affordable housing leave much to be desired, and often contribute to state-sponsored gentrification and displacement. All our interviewees stressed how the process of preserving affordable housing, specifically redevelopment processes, must include local voices and decision makers. Our interviewees also suggested that Community Housing Providers have a more honest and meaningful connection to the local communities and that they should be included in preservation efforts. Therefore, we suggest that the NSW government provide funding for CHPs to implement meaningful community engagement strategies when considering redevelopment or preservation processes. We also suggest funding robust technical assistance to CHPs; providing adequate opportunity for CHPs to compete with larger developers by granting them access to similar incentive programs; and proactively planning for the transitional periods associated with the termination of policies and programs that so frequently occur when public sector leadership shifts.

Protection

There are almost no forms of meaningful tenant protections sponsored by the local, state, or national government. This creates incredibly precarious housing situations for low-income renters, particularly on the private market. In order to improve this situation in a manner that is equitable and attentive to the current housing market in Sydney, we suggest that the local and regional governments work together to improve rental assistance programs for Sydney tenants. Current forms of rental assistance provided are implemented on a national scale and do not account for the varying cost of living in each region. We suggest that the Sydney governments adopt a model similar to the US's Small Area Fair Market Rent, where individual payment is linked to the local housing values.

Production

As stated by nearly all of the interview participants within this report, not enough affordable housing is currently being produced to meet growing demand. The 'backbone' policies and programs implemented by the NSW state government to produce affordable housing will not produce what is needed to realistically support the needs of low-income renters. The NSW government, in collaboration with local councils, must create a larger set of financing and zoning mechanisms for affordable housing. Financing should focus not only on providing funding for building costs, but also on the cost of maintaining livable conditions in affordable housing. Zoning mechanisms should be created in collaboration with local councils so that local officials view them as opportunities to provide a better housing environment for their residents instead of as burdensome or confusing.

Conclusions

What are the main drivers of gentrification and displacement in the Sydney metropolitan region?

What are the impacts of gentrification and displacement for low-income renters in the Sydney metropolitan region?

What policies or best practices improve housing stability for low-income renters?" by providing the following policy recommendations.

Our research adds evidence to existing research and theories about gentrification and displacement in Sydney. Both public and private sector actions are driving the continued gentrification and displacement seen in Sydney. Public and private sector actions such as promoting the commodification of housing and state-driven redevelopment that does not account for local needs are creating housing instability and perpetuating inequities. The results of this are a loss of social housing; a continued decrease in homeownership; inadequacies in the supply of private rentals; and the perpetuation of a settler colonial legacy that limits access to opportunities for those most vulnerable to change. This proves to be detrimental to the diverse array of low-income renters in the Sydney region by creating new patterns of segregation, instability, and inequity. The negative effects of both the drivers and impacts of gentrification and displacement were already apparent to those we interviewed and were supported by our quantitative findings. The effects that became apparent through our findings included increases in rent prices; decreases in housing stability/increase in housing stress; longer commute times; less economic mobility; unequal resources for public schools; fractured communities and social networks; and negative physical and mental health outcomes. Social and economic diversity are essential in urban areas, and Sydney will not be able to survive without the low-income households that work to provide its essential services.

Our research serves as a cautionary tale for the impacts of a housing ecosystem that greatly favors the private sector. While Australia's system of housing is unique, the information gathered in this report can serve as a basis for study in other places with similar schemes. The typologies we developed can hopefully assist researchers and policy makers in the greater Sydney region focus their efforts on increasing housing affordability in vulnerable areas. The interviews we conducted serve as a limited means of ground-truthing our quantitative findings and demonstrate that proactive steps are being taken to create and preserve affordable housing in Sydney.

Appendices

Appendix I: List of Interview Participants

Organization	Interview Participant	Stakeholder Category
Greater Sydney Council (GSC)	TBD Based on Agreed Upon Pseudonym	Regional Government Official
University of Sydney	TBD Based on Agreed Upon Pseudonym	Academic Researcher
University of Technology Sydney	TBD Based on Agreed Upon Pseudonym	Academic Researcher
Sublime Property	TBD Based on Agreed Upon Pseudonym	Real Estate Professional
Frasers Property Development	TBD Based on Agreed Upon Pseudonym	Housing Development Professional
University of New South Wales	TBD Based on Agreed Upon Pseudonym	Academic Researcher
City of Sydney	TBD Based on Agreed Upon Pseudonym	Local Government Official
Tenants Union of New South Wales	TBD Based on Agreed Upon Pseudonym	Community Organization Representative
Southern Sydney Regional Organisation of Councils (SSROC)	TBD Based on Agreed Upon Pseudonym	Regional Government Official
City of Canterbury Bankstown	TBD Based on Agreed Upon Pseudonym	Local Government Official
Inner West Council	TBD Based on Agreed Upon Pseudonym	Local Government Official
Inner West Council	TBD Based on Agreed Upon Pseudonym	Local Government Official
University of New South Wales - City Futures Research Center	TBD Based on Agreed Upon Pseudonym	Academic Researcher

Appendix II: Interview Guide

Can you walk us through how you've seen the area(s)/region changing in the last several decades, both positive and negative?

How have you observed (*region specific to participant*) changing over time in terms of the following (housing, transport, commerce, demographics)? Where have these changes been most acute?

How have you observed housing development processes changing over the last several decades, both positive and negative?

How have you started to see these changes impacting low-income households?

What evidence have you seen indicating displacement of low-income renters in (*region specific to participant*) over time?

Can you tell us about any links between transportation and housing development?

Could you tell us about what kind of clientele you get at (*project/firm specific to participant*)?

What is the popular perception of the (*region specific to participant*) region? What are people's sentiments on the ground in (*region specific to participant*) as it relates to gentrification and displacement? Are these issues being talked about? Who is talking about them?

What do you see as barriers to opportunity for low-income households in Greater Sydney today?

What policies, programs or investments in Greater Sydney have helped low- and moderate-income households stay in place?

What steps have been taken in (*region specific to participant*) to prioritize affordable housing?

What are some of the biggest obstacles to developing affordable housing in Sydney?

To what degree do planners involve the community when conceptualizing and implementing projects?

Could you tell us a bit about the relationship between local government and the regional/state level government regarding planning and housing policy?

What actions could be taken to better ensure low-income households remain stably housed even if gentrification occurs or rent prices go up?

Appendix III: Data Sources

Data Source	Indicators	Geographic Level	Years Available
Australian Bureau of Statistics (ABS) - Census Data	<ul style="list-style-type: none"> • Weekly Household Income - Bottom 2 Quintiles • Occupation - Manager or Professional • Educational Attainment - Bachelor Degree or Higher • Housing Tenure - Rental Dwellings • Unemployment Rate 	Statistical Area 2; Urban Centres and Localities (UCL)	2011; 2016
Twitter	<ul style="list-style-type: none"> • Outsider tweets 	Sydney UCL	2012-2016
AirBnB	<ul style="list-style-type: none"> • Listing Density • Number of Days Listing is Available (Reduction of Rental Housing stock) 	Sydney UCL	2019*
Transit.land	<ul style="list-style-type: none"> • SA2s that lie along rail line 	Sydney UCL	2019

* Even though the web-scraped data only shows listings that were available in November of 2019, it does display the date in which the host signed up for AirBnB. This will be used as a proxy for parsing dates of listing availability.

Appendix IV: Figures and Tables

Table 2: AirBnB Listings and Days Unavailable for Long-Term Lease by Case Study Area

Property Type	Sydney Avg. # Days Unavailable	N	Redfern/Waterloo Avg. # Days Unavailable	N	Marrickville Avg. # Days Unavailable	N	Sydenham/Bankstown Corridor (excluding Marrickville) Avg. # Days Unavailable	N
Apartment	77.11	22462	55.22	1381	44.244444	135	128.132931	331
Cabin	197.71	69	-	-	-	-	-	-
Condominium	77.93	825	61.70	86	183.5	2	101.1	10
Guesthouse	144.61	500	126.32	19	176.833333	12	129.083333	12
House	102.32	10244	71.03	322	80.285714	126	110.603448	116
Loft	102.72	241	88.00	31	0	1	127	1
Serviced apartment	183.63	228	105.12	17	-	-	272.5	2
Townhouse	89.56	1723	80.56	149	0.923077	13	116.636364	22

Figure 2: Number of Hosts Joining AirBnB by Property Type over time (without Apartments and Homes)

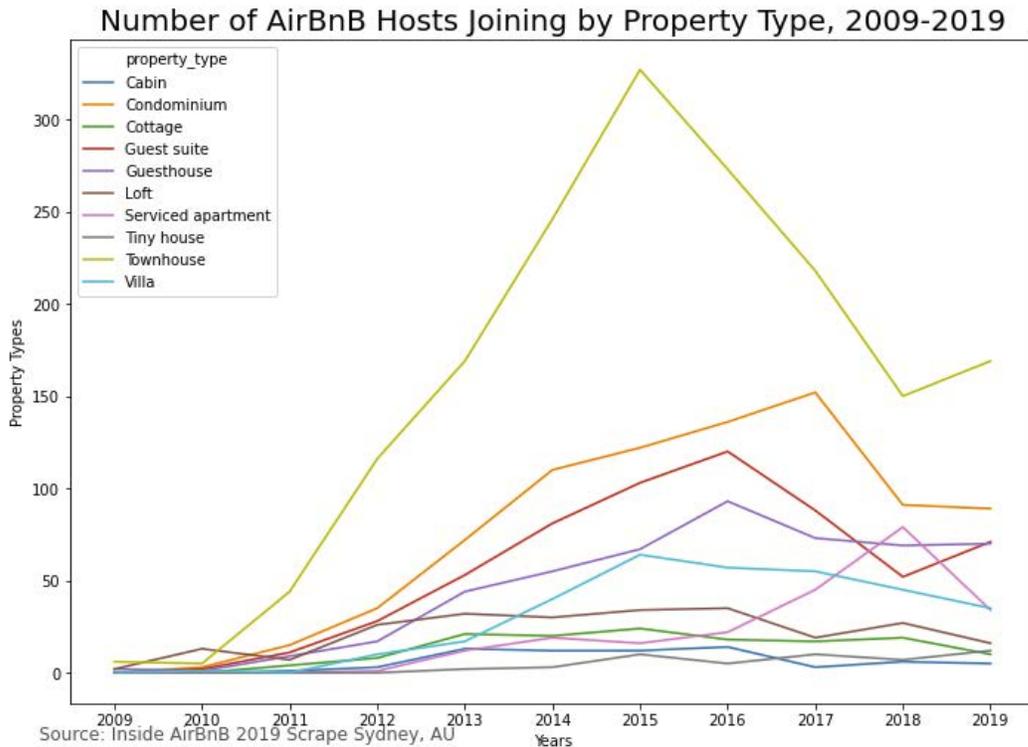


Figure 3: Number of Hosts Joining AirBnB by Property Type over time (without Apartments and Homes)

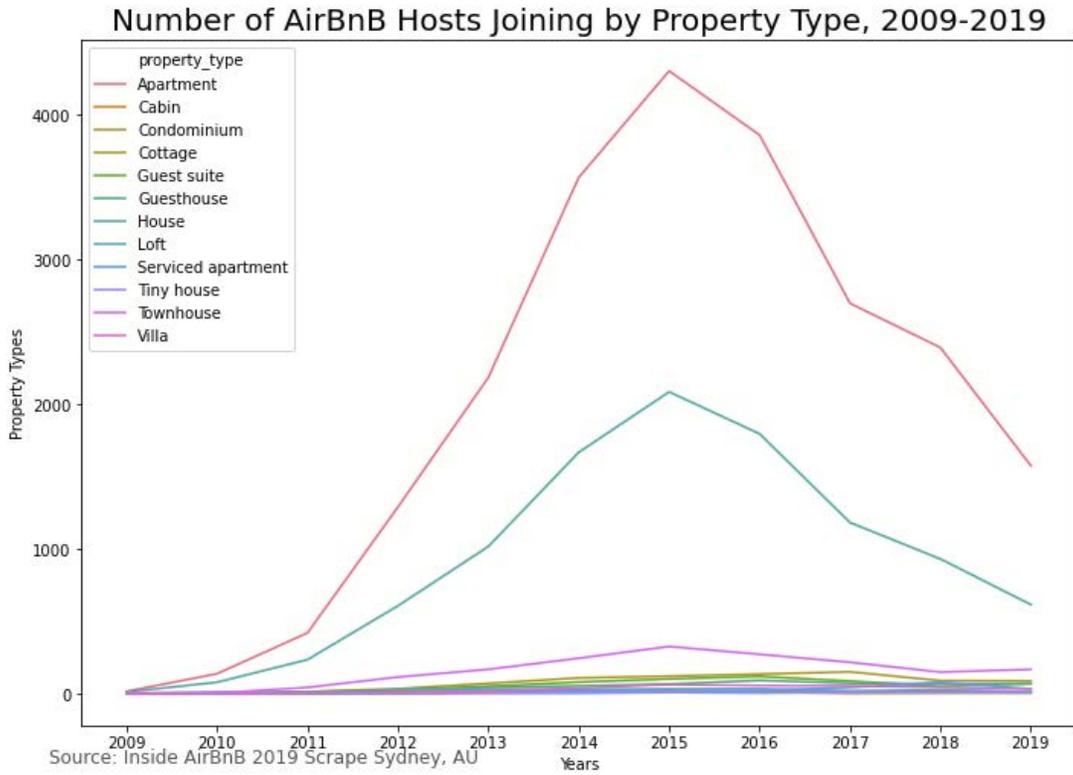
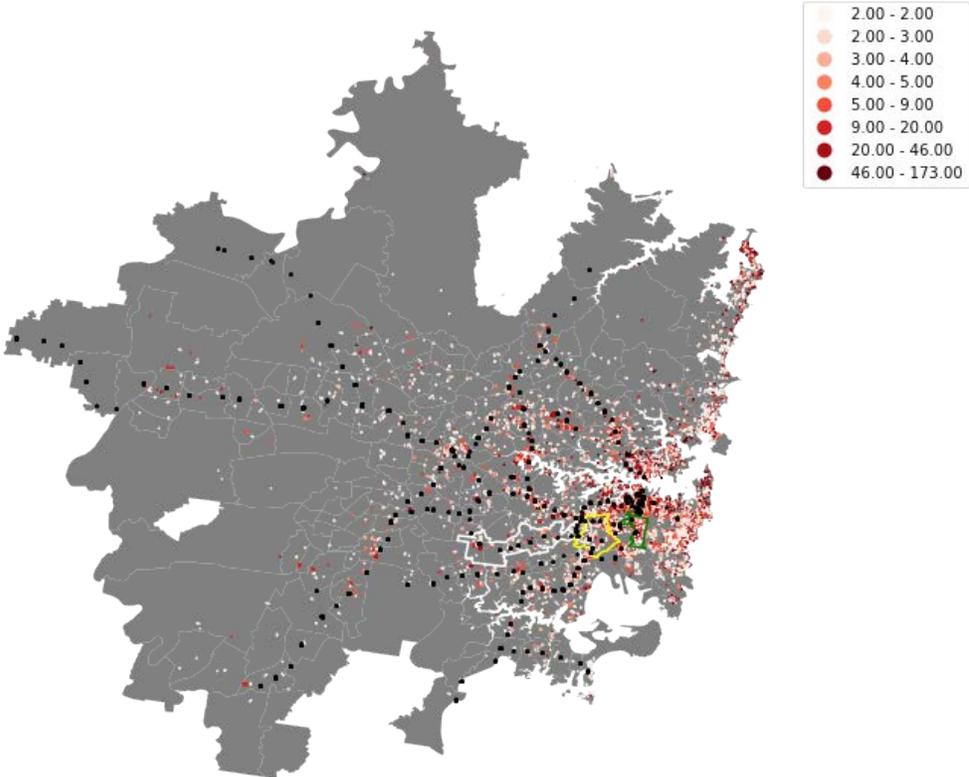


Figure 4: Listings where the Host has two or more listings on AirBnB in 2019, along Transit Corridors

Listings where Host has two or more Listings on AirBnB



Source: Inside AirBnB, November 2019; Australia ABS Census Shapes, 2016; Transit Entrances 2017

Table 3: Income Distribution by case study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total # of Households	1,227,417	14,538	8,305	42,465
	Count of Households with Income in Bottom 40th Percentile**	522,910	6,754	3,753	24,943
	% of Households with Income in Bottom 40th Percentile**	42.75%	46.39%	45.19%	59.12%
2016					
	Total Population	1,320,809	21,149	8,818	45,274
	Count of Households with Income in Bottom 40th Percentile**	560,299	9,776	3,712	26,356
	% of Households with Income in Bottom 40th Percentile**	42.52%	46.63%	42.10%	58.93%

** Defined as SA2s where the percent of households with low incomes in 2011 exceeds that percent in the region's median SA2 in 2011 (41.4 percent). We consider households as earning a low income if their income fell in the bottom 40th percentile for the Sydney metropolitan region. The nearest census income breakpoint inclusive of the bottom 40th percentile captures households earning less than \$1,250 per week (2011 Australian dollars). More accurately stated, our variable for the bottom 40th percentile extends up to the bottom 42.6 percent of households by income in the Sydney metropolitan region in 2011.

Table 4: Adults Age 25+ with a Bachelor's Degree or Higher by case study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Adults Age 25 and Over	1,743,778	20,945	11,300	53,726
	Count of Adults Age 25+ with a Bachelor's Degree or Higher	761,284	10,475	5,618	21,194
	Mean % of Population with Bachelor's or Higher	43.66%	50.01%	49.72%	39.45%
	Median % of Population with Bachelor's or Higher by SA2	39.60%			
2016					
	Total Adults Age 25 and Over	2,042,842	30,946	13,534	61,583
	Count of Adults Age 25+ with a Bachelor's Degree or Higher	986,742	18,271	7,493	28,104
	Mean % of Population with Bachelor's or Higher	48.30%	59.04%	55.36%	45.64%
	Median % of Population with Bachelor's or Higher by SA2	44.41%			

Table 5: Workers age 15+ Employed as Professionals/Managers by case study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Observed Population	1,881,694	19,513	12,197	56,845
	Total Professional/Managers	746,338	10,004	5,270	16,572
	Percentage of workers age 15+ employed as professionals/managers	37.23%	51.38%	43.21%	28.44%
	Median % of Workers Age 15+ Employed as Professionals or Managers by SA2	36.04%			
2016					
	Total Observed Population	2,079,288	28,746	13,905	64,438
	Total Professional/Managers	850,734	15,260	6,595	19,171
	Percentage of workers age 15+ employed as professionals/managers	38.51%	53.30%	47.43%	28.92%
	Median % of Workers Age 15+ Employed as Professionals or Managers by SA2	38.36%			

Table 6: Unemployment Rates by Case Study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Observed Population	3,212,734	34,484	20,904	115,376
	Total Unemployed	113,437	1,374	822	5,559
	Percent Unemployed	5.80%	6.56%	6.31%	9.16%
	Median Unemployment Rate by SA2	5.18%			
2016					
	Total Observed Population	3,566,031	51,464	22,760	126,041
	Total Unemployed	133,563	2,236	820	6,288
	Percent Unemployed	6.10%	7.27%	5.57%	9.23%
	Median Unemployment Rate by SA2	5.24%			

Table 7: Migration Patterns by Case Study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Observed Population	3,212,734	34,484	20,904	115,376
	Different Address 1-year	536,334	8,224	3,635	17,954
	Percent Different 1-year	14.46%	25.52%	15.87%	13.30%
	Different Address 5-year	1,383,474	18,513	9,163	48,662
	Percent Different 5-year	39.69%	59.65%	42.77%	39.65%
2016					
	Total Observed Population	3,566,031	51,464	22,760	126,041
	Different Address 1-year	647,390	15,722	4,274	22,989
	Percent Different 1-year	15.94%	32.64%	17.94%	15.99%
	Different Address 5-year	1,662,813	33,236	10,463	57,852
	Percent Different 5-year	42.86%	70.06%	45.41%	42.55%

Table 8: Housing Tenure (Rentals) with Public Housing by Case Study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Observed Population	1,367,692	16,133	9,193	47,572
	Total Renter	442,204	9,635	3,855	19,018
	Percent of Renters	32.80%	61.57%	43.24%	41.45%
	Total Renters in State (Public) Housing	64,891	3,019	445	2,188
	Percent Renters in State (Public) Housing	4.64%	19.15%	4.99%	4.72%
2016					
	Total Observed Population	1,464,639	23,267	9,734	50,195
	Total Renter	514,231	14,810	4,410	22,593
	Percent of Renters	34.36%	66.38%	46.73%	46.56%
	Total Renters in State (Public) Housing	63,833	3,094	443	2,223
	Percent Renters in State (Public) Housing	4.28%	13.84%	4.69%	4.64%

Table 9: Aboriginal/Indigenous Population by Case Study area 2011-2016

2011		Sydney UCL	Redfern-Waterloo	Marrickville	Sydenham to Bankstown Corridor (Excluding Marrickville)
	Total Observed Population	3,973,092	37,649	24,614	145,961
	Total Aboriginal/Indigenous Population	43,572	811	423	818
	Percent Aboriginal/Indigenous Population	1.05%	2.15%	1.72%	0.58%
	Median % of Aboriginal/Indigenous Population	0.65%			
2016					
	Total Observed Population	4,383,840	55,561	26,533	157,151
	Total Aboriginal/Indigenous Population	54,429	967	423	974
	Percent Aboriginal/Indigenous Population	1.19%	1.72%	1.59%	0.63%
	Median % of Aboriginal/Indigenous Population	0.73%			

Figure 5: Sydney UCL Tweets from Residents and Non-Residents in 2012

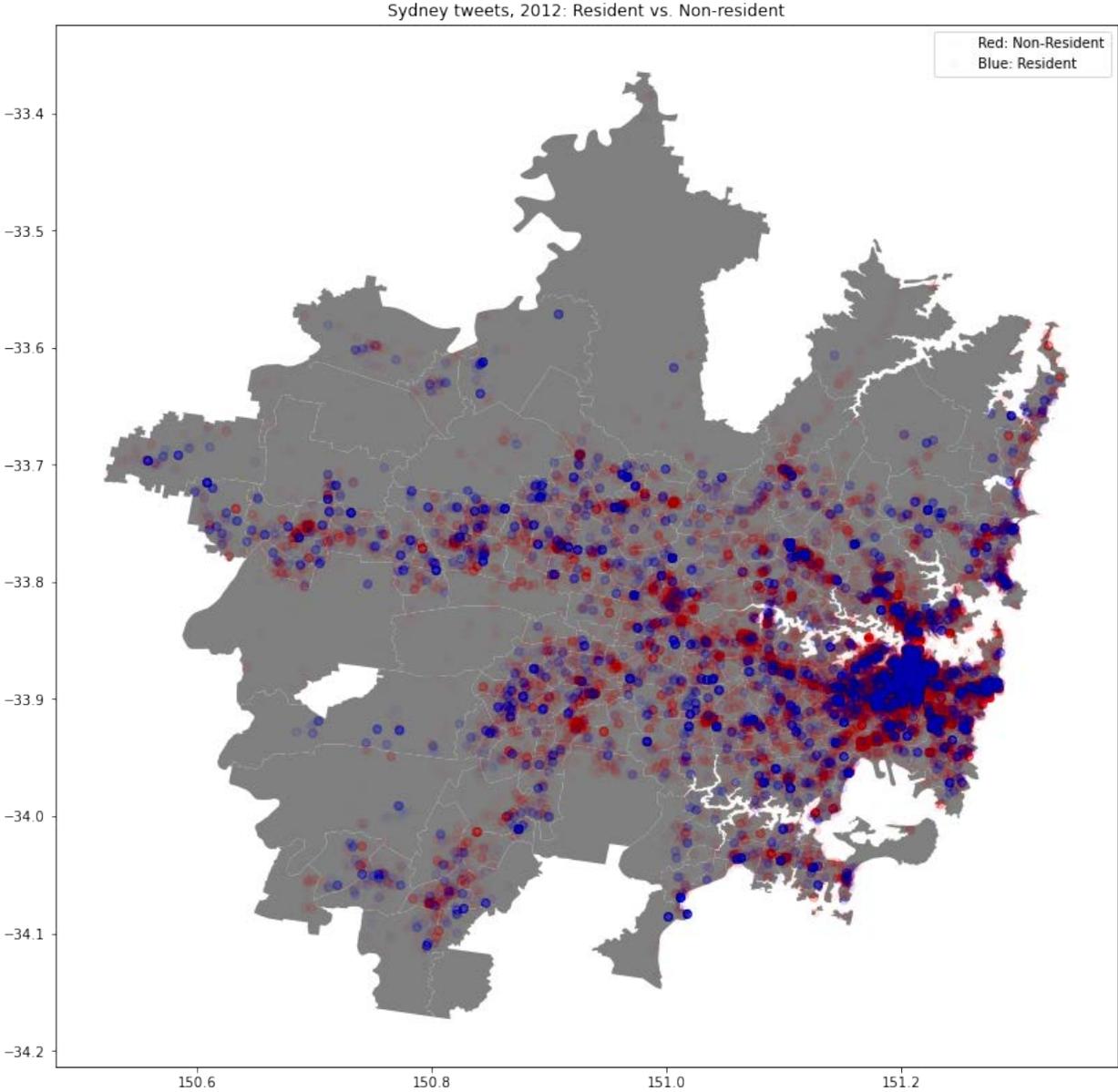


Figure 6: Sydney UCL Tweets from Individuals with “Home Tract” as Privileged that Tweeted Away from Home in 2012

Sydney Privileged Not Home Tweets in 2012

Green: Privileged Tweet

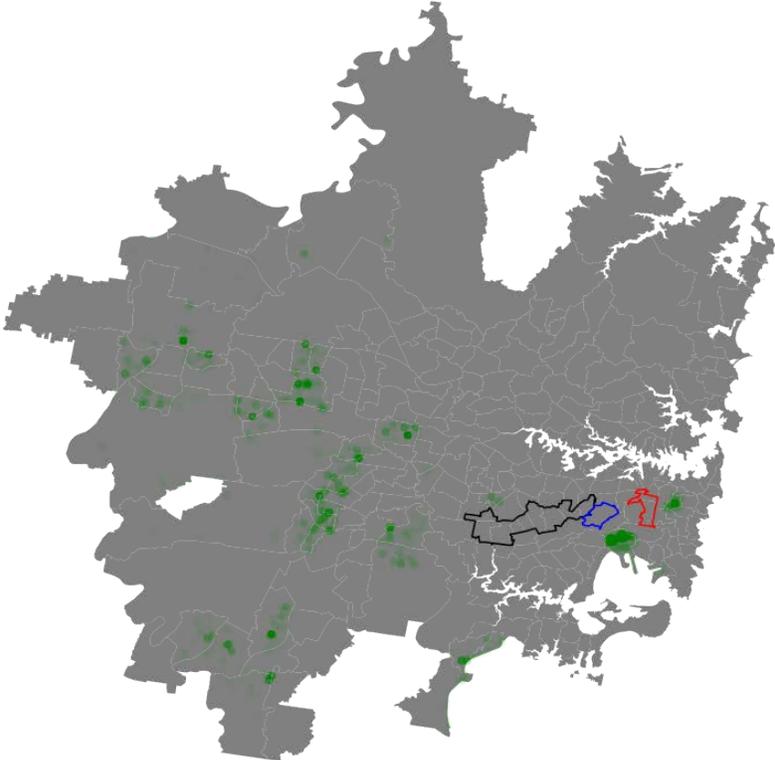


Figure 7: Sydney UCL Tweets from Individuals with “Home Tract” as Disadvantaged that tweeted away from home in 2012

Sydney, Tweets from people in Disadvantaged Tracts not in Home Tract in 2012

Red: Disadvantaged Tweet

