

# ECONOMIC BENEFIT AND COMMUNITY NEEDS ASSESSMENT



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PREPARED FOR ROSEHILL PTY LTD



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# 1. INTRODUCTION

Urbis Pty Ltd (**Urbis**) has been engaged by Rosehill Pty Ltd to prepare an Economic Benefit and Community Needs Assessment (the assessment) to support a planning proposal for 44-70 Rosehill Street, Redfern (the site).

The aim of this assessment is to identify the economic and community needs of the potential population and to inform a voluntary planning agreement for the proposed development

## 1.1. PROPOSED DEVELOPMENT

The proposed development consists of two towers, containing a mix of commercial and residential uses.

The development will include 312 apartments, 2,745sqm of commercial floor space, 150 cars space and 1,080sqm of communal open space.

Figure 1 – Concept design



Source: RobertsDay

## 1.2. SITE CONTEXT

The site is located within the City of Sydney (The City) Local Government Area (LGA) and is in close proximity to Redfern train station, the Australia Technology Park and the University of Sydney's Redfern campus.

The site is also within the 'innovation corridor' as identified within the Eastern City District Plan.

**Figure 2** overleaf shows the local context of the site.

Figure 2 – Site and local context



## 2. STRATEGIC CONTEXT

A review of key state and local policies was undertaken to understand the strategic context of the site and inform the needs assessment.

Policies reviewed include:

- Eastern City District Plan
- Sustainable Sydney 2030 – Community Strategic Plan
- Open Space, Sport and Recreation Needs Study 2016
- The Creative City Cultural Policy and Action Plan 2014-2024
- City of Sydney Development Contributions Plan 2015
- City of Sydney Childcare Needs Analysis 2013

**Table 1** provides the key findings from the review.

Table 1 – Strategic context

Area	Key findings
Population growth and community profile	<ul style="list-style-type: none"> <li>• The City of Sydney will experience significant population growth over the 20 years, driven by the anticipated urban renewal across the LGA. This growth will increase demand on existing services and infrastructure.</li> <li>• Redfern is a place of major significance to the Aboriginal and/or Torres Strait Islander community who have strong associations to the area.</li> </ul>
Community facilities	<ul style="list-style-type: none"> <li>• The nature of high rise living necessitates a greater reliance on public places to meet a range of needs and functions.</li> <li>• Co-locating social infrastructure improves safety, accessibility and encourages a greater diversity of uses and users.</li> <li>• Multipurpose and intergenerational facilities are the key to better use of, and access to, infrastructure in new developments.</li> <li>• There is an opportunity for increased shared use and more flexible use of underutilised facilities such as schools, sports facilities, church halls and creative spaces.</li> </ul>
Culture and the arts	<ul style="list-style-type: none"> <li>• Co-locating artistic and creative organisations will support creative enterprises and precincts. This requires planning for multi-functional and shared spaces with opportunities for artists and makers to live, work, exhibit, sell and learn locally</li> <li>• Opportunities to engaging business and commercial developers to incorporate temporary and long-term creative workspace into new developments through voluntary planning agreements.</li> <li>• There is an identified lack of work spaces, including rehearsal rooms, studios and meeting rooms.</li> <li>• There is a need for projects that support creative start-ups and help artists access empty space.</li> </ul>



Area	Key findings
	<ul style="list-style-type: none"> <li>Encouraging the development of Aboriginal and Torres Strait Islander cultural heritage is a key objective in Redfern. The City is implementing the Eora Journey Plan to encourage art works in the public domain, support signature events in City and economic development.</li> </ul>
Affordable housing	<ul style="list-style-type: none"> <li>Population growth, the desirability of the inner city to high income professionals, and high demand for investment properties are driving up market prices.</li> <li>Sydney has a very limited supply of affordable rental housing for essential workers at below market rates.</li> <li>The City of Sydney has set a target that by 2030, 7.5% of all housing in the local area will be social housing provided by government and community providers and 7.5% will be affordable housing delivered by not-for-profit or other providers.</li> <li>There is a need to achieve a mix of housing and increase the supply of social housing in inner city locations.</li> <li>Urban renewal sites offer important opportunities to deliver community rental housing.</li> </ul>
Open space	<ul style="list-style-type: none"> <li>72% of the City's parks are less than 3,000m<sup>2</sup> in area which limits the range and diversity of facilities able to be accommodated.</li> <li>There is an undersupply of larger open space which has resulted in heavy use pressures on existing fields and parks to cater for active recreation and sport.</li> <li>The limited amount of large space available means that open space has to be flexible and multi-purpose to cater for a wide range of needs.</li> <li>There is an increasing demand for sport facilities to support residents and workers.</li> <li>There will be relatively few opportunities to increase the quantity of public open space, and therefore greater emphasis will be needed on improving the quality and connections between open space.</li> </ul>
Childcare	<ul style="list-style-type: none"> <li>Planning for early education and child care facilities requires innovative approaches to the use of land and floor space, including co-location with compatible uses such as primary schools and office buildings, close to transport facilities.</li> </ul>

## 3. COMMUNITY PROFILE

The following demographic analysis is based on 2016 ABS census data for the study area (2 kilometre radius from the subject site.)

For comparison, the study has been benchmarked against the City of Sydney LGA and Greater Sydney Greater Capital City Statistical Area (GCCSA). More detail can be found in **Appendix A**.

In 2016 the study area had a population of 128,675. Key characteristics of the study area's population area:

### 3.1. DENSITY

- The study area has a population density of 9,264 people per square kilometre, compared to the City of Sydney LGA (7,875 people per square kilometre) and Greater Sydney (390 people per square kilometre).

### 3.2. AGE

- The study area has a younger average age of 33.5, compared to 35 for the City of Sydney LGA and a median age of 36 for Greater Sydney.
- The largest five-year age groups in the study area are 25-29 (18.72%) followed by 20-24 (16.36%), 30-34 (14.59%) and 35-39 (9.14%), which make up over half (59%) of the population of the suburb.
- School aged children (5-19) make up 8.37% of the study area's population compared to 7.39% in City of Sydney LGA and 18.2% across Greater Sydney.

### 3.3. HOUSEHOLD AND FAMILY STRUCTURE

- The study area is home to significantly less family households (47.06%) than Greater Sydney (73.6%).
- The study area is home to significantly more lone person households (34.73%) compared to Greater Sydney (21.6%).
- There are also significantly more couples with no children (61.77%) compared to Greater Sydney (33.4%).

### 3.4. CULTURAL DIVERSITY

- The study area (55.86) % and City of Sydney LGA (54.7%) are culturally diverse with more than half (55.86%) of the study were born overseas, compared to 42.9% for Greater Sydney.

### 3.5. OCCUPATION AND EDUCATION

- The study area has a higher proportion of professionals (38.65%) compared to the Greater Sydney (26%).
- The study area has a high proportion of individuals with a Bachelor Degree or higher (43.51%) compared to Greater Sydney (24.1%).

### 3.6. HOUSEHOLD AND DWELLING STRUCTURE

- The majority (68.13%) of households in the study area renting, compared to Greater Sydney (34.1%).
- The majority of people in the study area live in a flat, unit or apartment (72.63%) compared to only 28.1% of Greater Sydney.

### 3.7. INCOME

- The study area has a lower average weekly household income (\$2,054) compared to City of Sydney LGA (\$2,168) however is higher than the Greater Sydney median weekly household income (\$1,750).

### 3.8. SEIFA

The Socio-Economic Indexes for Areas (SEIFA) has been developed by the ABS to provide an overview for social and economic wellbeing and welfare of communities across a range of spatial scales. Four indices have been developed, as follows:

- **Index of Relative Socio-economic Disadvantage:** focuses primarily on disadvantage, and is derived from Census variables like low income, low educational attainment, unemployment, and dwellings without motor vehicles.
- **Index of Relative Socio-economic Advantage and Disadvantage:** is a continuum of advantage (high values) to disadvantage (low values), and is derived from Census variables related to both advantage and disadvantage.
- **Index of Economic Resources:** focuses on financial aspects of advantage and disadvantage, using Census variables relating to the educational attainment, employment and vocational skills.
- **Index of Education and Occupation:** includes Census variables relating to the educational attainment, employment and vocational skills.

**Scores:** A lower score indicates that an area is relatively disadvantaged compared to an area with a higher score. The area with the lowest score is given a rank of 1, the area with the second lowest score is given a rank of 2 and so on, up to the area with the highest score which is given the highest rank.

Table 2 – SEIFA Index

	Disadvantage		Advantage and Disadvantage		Economic Resources		Education and Occupation	
	Score	Decile	Score	Decile	Score	Decile	Score	Decile
Redfern suburb	993	5	1063	9	890	1	1105	10
City of Sydney LGA	1027	9	1095	10	883	1	1149	10

SEIFA data indicates that Redfern suburb performs well in terms of Advantage and Disadvantage and Education and Occupation,

The lower score in Disadvantage for Redfern Suburb could be caused by the lower weekly income compared to City of Sydney LGA. The low score in Economic Resources for both Redfern Suburb and City of Sydney LGA would be influenced by the high levels of renting and low levels of home ownership compared to Greater Sydney.

### 3.9. POPULATION PROJECTIONS

Population projections are based on Forecast.id analysis. More detail is provided in **Appendix C**.

The City of Sydney will experience strong growth across all age groups. Overall the age distribution in the City of Sydney LGA will remain consistent, with the largest 5-year age group being 25-29, as shown in **Appendix B**.

City of Sydney LGA will experience significant growth in the number of both older and younger people. The age groups with the highest growth rate are aged 80-84 (120% increase), over 85 (107.9% increase) and 15-19 (107.1% increase).

In 2036, lone person households (37.7%) will be the dominant household type in City of Sydney, followed by couples without children (28.9%).

Families (comprising couple families with dependents, one parent families and other families) will represent only 20% of households in 2036.

### **3.10. POPULATION OF THE PROPOSED DEVELOPMENT**

According to the 2016 ABS Census, the average people per household for Redfern suburb is 2. Using the occupancy rate of 312 dwellings the proposal will generate an incoming population of approximately 624 people.

Based on the apartment breakdown and demographic profile of the area, the incoming population is likely to have the following characteristics:

- Predominately urban professionals that live alone or in couple households without dependants
- They will be tertiary educated working as professionals
- Renting rather than home owners
- Come from a culturally diverse background

## 4. EXISTING AND PLANNED SOCIAL INFRASTRUCTURE

The following sections provide an audit of existing and planned (DA approved) social infrastructure services and facilities provided within an 800m walking catchment and 2km radius of the site.

Figure 3 maps the existing and planned social infrastructure. A full list of the mapped infrastructure is provided in **Appendix C**.

Table 3 – Social infrastructure categories considered

Category	Types of Social Infrastructure
Open space	Land zoned RE1 and E2
Childcare	Childcare or early learning centres
Education	Primary schools, high schools and tertiary education centres
Health Facility	Community health centres and hospitals

### 4.1. OPEN SPACE

There are seven areas of open space within 800m of the site and 26 within 2km. The site is adjacent to Gibbons Reserve a local level park and off leash dog area, identified on the City of Sydney's website.

Alexandria Park (13) is a significant open space facility due to its location and size. The park features a multipurpose sports field, 2 tennis courts and a basketball court. The park also incorporates a children's playground and picnic shelters. Redfern Park (16) is also located within an 800m radius of the site and incorporates an oval, grandstand and children's playground. The park also includes the Redfern Oval community room which is available for hire every day of the week.

There are other large open space facilities located within 2km of the site including Moore Park Golf Course, Wentworth Park and Prince Alfred Park. The University of Sydney also features large sporting facilities and open space areas. There are also a number of small reserves and playgrounds located within both an 800m and 2km radius.

### 4.2. CHILDCARE

There are eight child care facilities within 800m of the site and 37 within 2km. SDN Brighter Futures Central Sydney (9) is a significant child care facility as it is located in close proximity to the site. The facility is a long day care for children 0-6 years.

In 2017 a development approval was granted for a mixed use development incorporating a child care centre at 88 Regent Street (1). The future child care centre will be within 450m walking distance to the site.

There are also planned child care facilities at the nearby Australian Technology Park.

### 4.3. EDUCATION

There is one education facility within 800m of the site and 37 within 2km.

The education facility located within 800m of the site is Alexandria Park Community School which is a large school catering for students from kindergarten to year 12.

There are a number of other government and non-government primary and secondary schools within an 8km radius of the site. Also located in this precinct are a number of tertiary education facilities including the University of Sydney, the University of Technology and TAFE NSW Ultimo campus and Sydney campus.

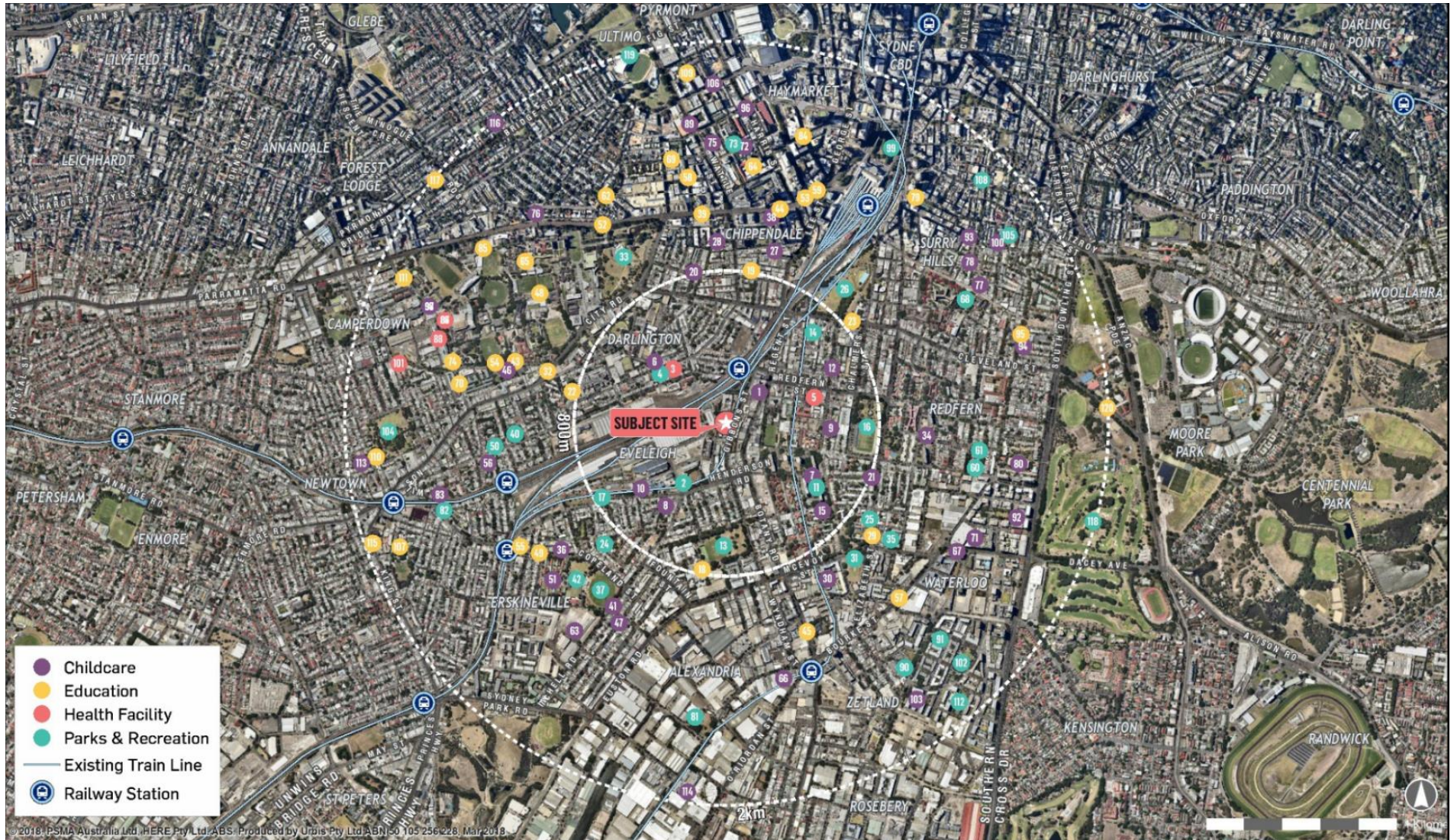
## 4.4. COMMUNITY HEALTH

There are two health facilities located within 800m of the site and three located within 2km.

The Redfern Community Health Centre is a significant community health facility within 800m of the site due to its proximity. The facility provides a range of healthcare services in early childhood, alcohol and drug services, sexual health, mental health and aboriginal health. The Youthblock Youth Health Service is also located within 800m of the site and provides free and confidential counselling and health services for young people aged 12-24.

A significant health facility located within 2km from the site is the Royal Prince Alfred Hospital (RPA) which is a public hospital with an emergency department. RPA has over 500 beds and provides a range of services, some of which include an intensive care unit, obstetric services and an oncology unit.

Figure 3 – Existing and planned (DA approved) social infrastructure within 2km of the subject site



## 5. NEEDS ASSESSMENT

The following benchmark assessment is based on a proposed develop of 312 apartments with an incoming population of 624 people.

### 5.1. CHILDCARE

The City of Sydney has developed childcare benchmarks<sup>1</sup> for resident and worker population growth. The benchmarks are:

- Resident demand – 1 child care place per 2 children (aged 0–5 years) in each village
- Worker demand (outside the central business district) – 1 child care place per 75 workers in each village.

#### Resident demand

Within the study area, young children aged 0-4 make up approximately 3.5% of the population and by 2036 population projections indicate 0-4 year olds will continue to make up less than 5% (4.1%) of the City of Sydney population.

Based on this we have conservatively assumed that 5% of the population of the proposed development (624 people) will be children aged 0-5, which equates to 31 children.

Using the City of Sydney benchmark this will generate a demand for 16 childcare places.

#### Worker demand

The site currently accommodates four separate businesses which collectively employ 240 people on-site. The proposed developed seeks to maintain this employment target and no additional demand for childcare from the worker population is anticipated.

#### Overall demand

While it is recognised that the development is likely to generate residential demand for additional childcare, it is anticipated that based on the demographics of the area and the number of existing or planned facilities in proximity to the site, that the demand will be met by existing and planned facilities.

### 5.2. OPEN SPACE

Based on the increased residential population of the proposed development, additional demand for open space will be generated.

The City of Sydney does not set a demand based benchmark, but the Open Space, Sport and Recreation Needs Study 2016, identifies a range of quantitative and qualitative benchmarks for open space.

This proposed development meets the City of Sydney's requirements for all residential dwellings to be within 400 metres from local open space, as the site is located adjacent to Gibbons Reserve, a local level park and off-leash dog park.

The Open Space, Sport and Recreation Needs Study also references the State Government's Recreation and Open Space Planning Guidelines for Local Government. These include 9% of site area for local and district level open space provision and 15% of site area including regional open space provision. At the time of the study, the current open space provision of 386 hectares represents<sup>1</sup> 4.8% of the total land area in the City LGA.

The City of Sydney's Open Space, Sport and Recreation Needs Study 2016 recognises that there is limited opportunity to dramatically increase the quantity of available open space to keep pace with anticipated population growth. Therefore, as well as providing additional open space the City on focused no increasing the quality, diversity, usability capacity, and accessibility of existing open space.

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<sup>1</sup> City of Sydney Development Contributions Framework 2015



Based on this study, improvements /dedication of local open space are an identified need in the local community.

### **5.3. AFFORDABLE HOUSING**

This study does seek to make an assessment of affordability but the needs for affordable housing.

Generally, the City of Sydney has a very limited supply of affordable rental housing for essential workers at below market rates and Redfern is becoming increasingly desirable to high income professionals due to proximity to the CBD and other opportunities.

The City of Sydney is identified in SEPP 70 - Affordable Housing as an area where there is a need for affordable housing. To meet this, need the City has set a target of 7.5% of all city housing will be social housing, and 7.5% will be affordable rental housing, delivered by not-for-profit or other providers. To meet this target, an addition 9,700 dwellings will be required between 2014 and 2030.

The proposed development is located close to key infrastructure, economic opportunities and amenity of Redfern village and is considered an appropriate location for affordable housing.

Based on this study, affordable housing is an identified need in the local community.

### **5.4. HEALTH**

The City of Sydney does not have an established benchmark for community health centres and the provision of hospitals and health services is generally the role of the state government.

The site is within 800 metres of two community health centres and is within 2km from the major RPA Hospital. Additional private sector general practices are also located in the Redfern village area and around the station.

Based on this study, health infrastructure is not considered a requirement for the proposed development.

### **5.5. EDUCATION**

The City of Sydney does not have an established benchmark for education and the provision of schools is generally the role of the state government.

The site is within 800 metres of Alexandria Park Community School which is a large school catering for students from kindergarten to year 12. This school is being redevelopment to increase capacity, as well new school developments at Green Square and Surry Hills.

Based on this study, education is not considered a requirement for the proposed development.

## 6. EMPLOYMENT POTENTIAL

This section considers the potential for the proposed development to make a positive contribution to employment generation in Redfern. As the proposed development involves a mixed-use concept, our analysis has been based on the premises that the development will at least maintain the same number of on-site jobs as currently provided.

Our analysis demonstrates:

- The commercial floorspace within the proposed redevelopment is capable of being configured to provide space for the same amount of jobs that are currently accommodated on-site
- The site benefits from excellent connectivity and is well positioned to contribute to emerging Creative Industry, Education and Knowledge Industry and Digital Industries clusters on the edge of the CBD
- It can continue to be attractive to small- medium enterprises and business start-ups by providing affordable accommodation

### 6.1. EXISTING ON-SITE JOBS

The current building provides 3,200 sq.m net lettable area (NLA) office floorspace. It accommodates four separate business which collectively employ 240 people on-site.

Existing business include a mix of professional, scientific and creative industries, comprising:

- Transport for NSW – Government Services
- Atari Namco-Bandai – Digital software
- Sapphire Bioscience Pty Ltd – medical product imports and exports; and
- NTS Corp (Aboriginal Native Title Service)

The building achieves an overall employment density of 13.3 jobs per sq.m, ranging from 10.9 sq.m per job (Transport NSW) to 19.6 sq.m per job (NTS Corp).

Table 4 – Existing On-Site Employment

Tenant	Industry	NLA (sq.m)	No. Employees	Employment Density (sq.m/employee)
Transport for NSW	Government	1,310	120	10.9
Atari Namco-Bandai Partners	IT/Software	574	50	11.5
Sapphire Bioscience	Import/Export	340	20	17.0
NTS Corp	Justice Services	980	50	19.6
<b>Total</b>		<b>3,204</b>	<b>240</b>	<b>13.3</b>

## 6.2. FUTURE POTENTIAL JOBS

The development concept provides 2,745 sq.m NLA of commercial floorspace. To maintain an equivalent number of jobs as currently being achieved, the building will need to be configured to achieve an average employment density of **11.4 sq.m per job** (see Table 2). This is consistent with the rate already being achieved by the two largest employers in the premises (Transport for NSW and Atari Namco-Bandi) and should therefore be achievable in a commercial office configuration.

As businesses move towards open plan environments, flexible work arrangements and activity-based working more efficient use of office space is possible, as not all employees may be working at the same time.

Table 5 – Future Employment Potential

NLA (sq.m)	Employment Target	Density Required (sq.m/Employee)
2,745	240	11.4

## 6.3. MARKET SECTOR POSITIONING

The site is well positioned to attract and retain businesses seeking commercial premises for a variety of reasons including:

- Proximity to Redfern train station providing excellent public transport connectivity
- Strong projected employment growth locally driving demand for space, with a focus on creative, digital and education and knowledge sectors. This will be reinforced by the emerging role of the Australian Technology Park as a major employment node.
- Historically low office vacancy levels in Sydney CBD means that areas such as Redfern will be attractive for small-to-medium enterprises and business start-ups looking for space.

Redfern is located close to the Creative Industry, Education and Knowledge Industry and Digital Industries hubs around Chippendale-Camperdown, Surry Hills and The Australian Technology Park (refer to Map 1). The subject site located within the Digital Industries Cluster.

The City of Sydney's Economic Development Strategy supports strengthening these clusters, noting:

*“Underpinning city productivity and innovation advantages are the development and encouragement of clusters – places that support the exchange of ideas through the interaction of people and innovation from the interaction of business.”*

Map 1 – Industry Clusters in the City of Sydney Local Government Area (LGA)



Source: *The City of Sydney Economic Development Strategy*

The subject site can continue to make a positive contribution to the City's Economic Development Strategy by providing space for businesses in these sectors. The opportunity to leverage off proximity to other businesses in these sectors can strengthen these clusters.

The inclusion of a commercial floorspace element will contribute to jobs growth in key sectors in the area. Table 5 sets out NSW Bureau of Transport Statistics (BTS) jobs forecasts for the Sydney LGA and more specifically for Redfern, Chippendale and Surry Hills. It demonstrates that:

- At the local level (Redfern-Chippendale and Surry Hills) the sectors that are projected to experience the highest growth are professional, scientific and technical service (+3,970 jobs between 2016-26) and financial and insurance services (+2,240 jobs between 2016-26).
- Information, Media and Telecommunications jobs are also projected to increase by 430 jobs over the same period.
- Strong growth in these sectors is mirrored at the Sydney LGA level

Table 6 – Job Growth by Sector, Redfern, Chippendale and Surry Hills, Sydney LGA

Industry Sector	Redfern, Chippendale, Surry Hills			Sydney LGA		
	2016	2026	2016-26 Change	2016	2026	2016-26 Change
Professional, Scientific and Technical Services	10,220	14,191	3,971	111,772	141,801	30,029
Financial and Insurance Services	727	2,967	2,240	101,029	118,180	17,151
Health Care and Social Assistance	3,577	4,406	829	30,334	35,997	5,663
Public Administration and Safety	5,696	6,478	782	38,232	43,074	4,842
Education and Training	2,780	3,407	628	26,352	31,470	5,118
Retail Trade	2,536	3,057	521	28,006	31,384	3,378
Administrative and Support Services	2,626	3,136	509	25,925	28,380	2,455
Accommodation and Food Services	3,574	4,070	496	37,993	42,042	4,050
Manufacturing	791	1,245	454	8,825	9,796	971
Information Media and Telecommunications	5,178	5,609	432	32,918	33,944	1,026
Arts and Recreation Services	1,754	2,179	424	15,867	18,728	2,861
Rental, Hiring and Real Estate Services	587	885	298	11,737	13,426	1,690
Other Services	2,027	2,247	219	15,100	16,257	1,158
Construction	1,475	1,648	173	20,580	22,878	2,298
Transport, Postal and Warehousing	1,677	1,764	87	20,798	21,529	731
Wholesale Trade	1,404	1,467	63	12,012	12,580	569
Printing (incl. Reproduction of Recorded Media)	146	172	25	1,962	2,288	326
Electricity, Gas, Water and Waste Services	107	125	18	4,078	4,755	677
Mining	21	24	3	1,507	1,681	174
Agriculture, Forestry and Fishing	18	17	-1	327	313	-15
<b>Total</b>	<b>46,922</b>	<b>59,092</b>	<b>12,169</b>	<b>545,353</b>	<b>630,504</b>	<b>85,151</b>

Source: BTS Employment Data

## 6.4. SUPPORTING BUSINESS START UPS AND SMALL-TO-MEDIUM ENTERPRISES (SMES)

In addition, benefitting from excellent public transport accessibility, a key part of Redfern's appeal as a location for SMEs and start-ups is competitively priced office space relative to core office markets such as the CBD.

Analysis of existing vacant commercial floorspace across Redfern and Chippendale indicates that existing rents at the subject site are 12%-15% below the average for these suburbs (on a per sq.m basis, noting that the subject site is currently configured to provide larger floorplates than many of the premises currently available for lease). This is illustrated in Table 4.

Table 7 – Commercial Rents, Redfern, Chippendale, Surry Hills (March 2018)

Location	No. Tenancies	Average Size Tenancy (sq.m)	Average Rent (\$/sq.m)
Subject Site	4	801	\$425
Redfern	16	138	\$481
Chippendale	10	216	\$570

Source: Real Commercial, Rosehill Pty Ltd

Post redevelopment, should the site continue to provide competitively priced office space it should be an attractive proposition for SMEs and business start-ups.

Alternatively, the site could also cater to this market by providing flexible workspace. This is a model that has proven popular with startups and small-to-medium businesses in digital industries around the world. In Australia, WeWork has opened coworking office space in three Sydney locations (Pyrmont, Martin Place and George Street) and two Melbourne locations (Collins Street and Bourke Street).

Urbis analysed a number of flexible workspace leases on the market in Redfern. The average rental price for these flexible workspaces is \$800 per square metre. These rates are significantly higher, but provide more flexibility in the rental terms. Tenants can agree to short or long term tenancies and rent is paid weekly, including furnishings, internet, electricity, regular cleaning and other outgoings.

Providing either discounted or flexible rental arrangements would be a positive contribution to the local economy.

## **7. RECOMMENDATIONS FOR SOCIAL INFRASTRUCTURE**

### **7.1. OPEN SPACE**

The incoming population of the development is likely to place additional pressure on existing local open space and with the proposed redevelopment of Redfern Train Station, Gibbons Reserve is likely to become a more intensely used green space for residents, workers and commuters.

There is limited opportunity to increase the quantity of open space within the City of Sydney and qualitative improvements to open space are central considerations, including improvement to landscaping, embellishments such as seating, lighting, outdoor gym equipment, play spaces and other facilities to improve useability.

Based on this study, embellishment /dedication of local open space should be considered as part of any planning agreement for the proposed development.

### **7.2. CREATIVE INFRASTRUCTURE**

The site is within the 'innovation corridor', close to Creative Industry, Education and Knowledge Industry and Digital Industries hubs around Chippendale-Camperdown, Surry Hills and The Australian Technology Park (refer to Map 1).

Based on these locational factors and proximity to Redfern Train Station the subject site can support the aims of the City of Sydney's Economic Development Strategy by providing space for businesses in the 'innovation' sectors and support key actions from the City of Sydney's Cultural Policy by co-locating artistic and creative organisations.

Creative infrastructure that could be provided may include temporary spaces or long-term opportunities for creatives, artists and makers to live, work, exhibit, sell and learn locally.

Redfern is also place of major cultural significance to the Aboriginal and/or Torres Strait Islander community who have strong associations to the area.

Based on this study, cultural infrastructure is appropriate to consider as part any planning agreement for the proposed development.

### **7.3. AFFORDABLE HOUSING**

Generally, the City of Sydney has a very limited supply of affordable rental housing for essential workers at below market rates and Redfern is becoming increasingly desirable to high income professionals due to proximity to the CBD and other opportunities.

The proposed development is located close to key infrastructure, economic opportunities and amenity of Redfern village and is considered an appropriate location for affordable housing.

Based on this study, affordable housing is appropriate to consider as part of any planning agreement for the proposed development.

## **CONCLUSION**

The report provides an analysis of the potential employment benefits and community needs. Based on this a series of recommendations to be considered as part of a future planning agreement for the proposed development.

Consultation with the City of Sydney and other relevant agencies and service providers is recommended to test the findings of this report.





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This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the reasonable belief that they are correct and not misleading, subject to the limitations above.



# Appendix A

# DEMOGRAPHIC PROFILE

<b>Data Item</b>	<b>Study Area (2km)</b>	<b>City of Sydney (LGA)</b>	<b>Sydney GCCSA</b>
Population 2016 Census	128,675	208,847	4,823,991
Average Age of Persons	33.5	35.0	36 (median)
Population Density (Persons per Sq.km)	9,263.7	7,874.9	390.0
Average Per Capita Income	\$51,493	\$57,115	\$37,388
<b>Age Distribution (%)</b>			
Aged 0-4	3.5%	3.36%	6.4%
Aged 5-9	2.03%	1.94%	6.4%
Aged 10-14	1.38%	1.43%	5.8%
Aged 15-19	4.96%	4.02%	6.0%
Aged 20-24	16.36%	13.76%	7.1%
Aged 25-29	18.72%	17.95%	7.9%
Aged 30-34	14.59%	15.11%	8.1%
Aged 35-39	9.14%	9.58%	7.4%
Aged 40-44	6.31%	6.7%	7.1%
Aged 45-49	5.09%	5.52%	6.7%
Aged 50-54	4.36%	4.79%	6.3%
Aged 55-59	3.71%	4.24%	5.8%
Aged 60-64	2.96%	3.47%	5.0%
Aged 65-69	2.5%	3.03%	4.4%
Aged 70-74	1.64%	2.01%	3.3%
Aged 75-79	1.28%	1.41%	2.4%
Aged 80-84	0.85%	0.95%	1.8%
Aged 85+	0.62%	0.76%	2.0%
<b>Country of Birth and Indigenous Identification (%)</b>			
Australia born	44.14%	45.26%	57.1%
Overseas born	55.86%	54.74%	42.9%
China	14.28%	11.12%	4.7%

<b>Data Item</b>	<b>Study Area (2km)</b>	<b>City of Sydney (LGA)</b>	<b>Sydney GCCSA</b>
England	4.74%	5.13%	3.1%
Thailand	3.69%	3.66%	0.33%
New Zealand	2.72%	3.01%	1.8%
Aboriginal and Torres Strait Islander population	0.36%	0.28%	1.5%
<b>Language Spoken at Home (%)</b>			
English only	56.46%	58.78%	58.4%
Chinese Mandarin	14.12%	11.28%	4.7%
Chinese - Cantonese	3.7%	3.27%	2.9%
<b>Household Income (\$)</b>			
Average household income (\$/weekly)	\$2,054	\$2,168	\$1,750 (median)
<b>Car Ownership (%)</b>			
0 Cars	43.06%	42.71%	10.7%
1 Car	47.7%	47.44%	35.4%
2 Cars	12.43%	12.57%	31.1%
3+ Cars	1.91%	1.92%	14.9%
<b>Household Structure (%)</b>			
Family Households	47.05%	47.36%	73.6%
Group	18.22%	15.22%	4.7%
Lone Person	34.73%	37.42%	21.6%
<b>Family Composition (%)</b>			
Couple family with no children	61.77%	63.38%	33.4%
Couple family with children	23.6%	23.9%	49.5%
One parent families	10.6%	9.81%	15.2%
Other families	4.21%	3.72%	1.8%
<b>Housing Tenure (%)</b>			

<b>Data Item</b>	<b>Study Area (2km)</b>	<b>City of Sydney (LGA)</b>	<b>Sydney GCCSA</b>
Owner	12.66%	15.13%	29.1%
Purchaser	22.47%	21.59%	33.2%
Renter	68.13%	66.34%	34.1%
<b>Mortgage and Rent (\$)</b>			
Loan Mortgage Repayments (\$/monthly)	\$2,517	\$2,504	\$2,167
Rent Payments (\$/weekly)	\$538	\$555	\$440
<b>Labour Force (%)</b>			
% Unemployed	6.84%	5.97%	5.7%
Labour Force Participation	70.89%	73.56%	65.6%
<b>Occupation (%)</b>			
Professionals	38.65%	38.51%	26.0%
Clerical & Administrative Workers	11.34%	11.31%	16.5%
Technicians & trades workers	8.16%	8.1%	12.4%
Managers	15.9%	17.31%	15.5%
Community & Personal Service Workers	10.77%	10.39%	9.0%
Machinery operators & Drivers	1.64%	1.48%	5.8%
Sales Workers	8.08%	7.73%	9.2%
Labourers	5.45%	5.16%	7.5%
<b>Tertiary Education (%)</b>			
Bachelor Degree or Higher	43.51%	44.05%	24.1%
Advanced Diploma or Associate Degree	8.17%	8.42%	9.0%
<b>Highest Level of Schooling Achieved (%)</b>			

<b>Data Item</b>	<b>Study Area (2km)</b>	<b>City of Sydney (LGA)</b>	<b>Sydney GCCSA</b>
Year 8 or Below	1.92%	1.77%	4.0%
Year 9 or Equivalent	1.77%	1.65%	3.8%
Year 10 or Equivalent	6.03%	6.36%	16.6%
Year 11 or Equivalent	3.16%	3.24%	4.0%
Year 12 or Equivalent	86.34%	86.19%	62.1%
Did not go to School	0.84%	0.78%	1.4%
<b>Dwelling Structure (%)</b>			
Separate house	1.45%	1.94%	56.9%
Semi-detached	25.99%	20.14%	14.0%
Flat, Unit or apartment	72.63%	78.1%	28.1%

# **Appendix B      POPULATION PROJECTIONS**



City of Sydney LGA	Year						
	2016	2021	2026	2031	2036	% of 2036 population	%Change 2016-2036
Aged 0 to 4	7,823	10,974	11,905	12,834	13,593	4.1%	73.8%
Aged 5 to 9	4,359	5,059	6,764	7,414	8,129	2.4%	86.5%
Aged 10 to 14	3,222	3,876	4,463	5,575	6,136	1.8%	90.4%
Aged 15 to 19	9,341	15,849	17,674	18,303	19,343	5.8%	107.1%
Aged 20 to 24	31,219	35,522	39,890	41,664	42,780	12.8%	37.0%
Aged 25 to 29	40,568	42,194	45,063	48,374	50,175	15%	23.7%
Aged 30 to 34	33,107	36,962	39,418	42,002	44,322	13.2%	33.9%
Aged 35 to 39	20,653	25,746	28,541	30,495	32,364	9.7%	56.7%
Aged 40 to 44	14,641	17,396	20,823	22,844	24,371	7.3%	66.5%
Aged 45 to 49	12,040	13,382	15,630	18,376	20,020	6%	66.3%
Aged 50 to 54	10,742	11,588	12,879	14,783	16,937	5.1%	57.7%
Aged 55 to 59	9,609	10,165	10,980	12,167	13,734	4.1%	42.9%
Aged 60 to 64	8,007	8,850	9,411	10,217	11,274	3.4%	40.8%
Aged 65 to 69	7,037	7,039	7,833	8,446	9,262	2.8%	31.6%
Aged 70 to 74	4,651	5,824	6,059	6,897	7,614	2.3%	63.7%
Aged 75 to 79	3,151	3,921	5,014	5,453	6,339	1.9%	101.2%
Aged 80 to 84	2,093	2,464	3,120	4,041	4,606	1.4%	120.0%
Aged 85 +	1,947	2,249	2,689	3,296	4,048	1.2%	107.9%
Total persons	224,211	259,059	288,158	313,182	335,045	100%	49.4%

Table 8 – Type table caption here.

City of Sydney LGA	2016		2026		2036		No change 2016 -2036
	No	%	No	%	No	%	
Couple families with dependents	10,745	10.3	14,031	10.9	17,329	11.4	6,584
Couples without dependents	30,615	29.5	37,439	29.2	43,805	28.9	13,190
Group households	14,772	14.2	17,891	13.9	20,176	13.3	5,404
Lone person households	39,800	38.3	48,568	37.8	57,148	37.7	17,348
One parent family	4,856	4.7	6,548	5.1	8,420	5.6	3,564
Other families	3,054	2.9	3,890	3.0	4,537	3.0	1,483

# **APPENDIX C      AUDIT OF PROVISION**

<b>No.</b>	<b>Category</b>	<b>Name</b>
1	Childcare	Regent Street Apartments – 88 On Regent
2	Parks & Recreation	Vice Chancellors Oval
3	Health Facility	Youthblock Youth Health Service
4	Parks & Recreation	Charles Kernan Reserve
5	Health Facility	Redfern Community Health Centre
6	Childcare	KU Union Childrens Centre
7	Childcare	KU James Cahill Preschool
8	Childcare	KU Sunbeam Preschool
9	Childcare	SDN Redfern Children's Education and Care Centre
10	Childcare	Alexandria Childcare Centre
11	Parks & Recreation	Cook Community Garden
12	Childcare	Redfern Occasional Child Care
13	Parks & Recreation	Alexandria Park
14	Parks & Recreation	Reconciliation Park
15	Childcare	SDN Lois Barker Child and Family Learning Centre
16	Parks & Recreation	Redfern Park
17	Parks & Recreation	South Sydney Rotary Park
18	Education	Alexandria Park Community School
19	Education	EF International Language Campus
20	Childcare	Chippendale Child Care Centre
21	Childcare	K.U James Cahill Pre-School
22	Education	Darlington Public School

<b>No.</b>	<b>Category</b>	<b>Name</b>
23	Education	Cleveland ST Intensive English High
24	Parks & Recreation	Renwick Street Playground
25	Parks & Recreation	Tobruk Reserve
26	Parks & Recreation	Prince Alfred Park
27	Childcare	Child Care Centre – Level 1, Block 11 Central Park
28	Childcare	UTS Blackfriars Children's Centre
29	Education	Our Lady of Mt Carmel Catholic Primary
30	Childcare	McEvoy St Mixed Development
31	Parks & Recreation	Waterloo Park
32	Education	Moore Theological College
33	Parks & Recreation	Victoria Park
34	Childcare	Poet's Corner Kindergarten
35	Parks & Recreation	Kensington Reserve
36	Childcare	SDN Erskineville Children's Education and Care Centre
37	Parks & Recreation	Erskineville Oval
38	Childcare	Central Block 11- Wonderland
39	Education	The University of Notre Dame
40	Parks & Recreation	Hollis Park
41	Childcare	Froebel Alexandria Early Learning Centre
42	Parks & Recreation	Harry Noble Reserve
43	Education	University of Sydney
44	Education	University of Technology Sydney

<b>No.</b>	<b>Category</b>	<b>Name</b>
45	Education	Green Square School
46	Childcare	KU Carillon Avenue Child Care Centre
47	Childcare	Wunan Pre-School
48	Education	University of Sydney, School of Physics
49	Education	St Mary's Primary School
50	Parks & Recreation	Jack Haynes Reserve
51	Childcare	Gowrie OSHC Erskineville
52	Education	University of Sydney
53	Education	International Institute of Business
54	Education	Newtown North Public School
55	Education	Erskineville Public School
56	Childcare	Boundary Lane Children's Centre
57	Education	Taylor's College, Sydney
58	Education	Sydney College of English
59	Education	Tafe NSW – Sydney Institute
60	Parks & Recreation	Jack O'Brien Reserve
61	Parks & Recreation	Elizabeth Mccrea Park Playground
62	Education	Glebe Public School
63	Childcare	Park Sydney Blocks B&C
64	Education	Tafe NSW Ultimo College
65	Education	University of Sydney, Faculty of Education
66	Childcare	The Joey Club Sydney
67	Childcare	Diversity Waterlook_Stage _Block A_NO1 Lachlan
68	Parks & Recreation	Ward Park
69	Education	International Grammar School

<b>No.</b>	<b>Category</b>	<b>Name</b>
70	Education	University of Sydney
71	Childcare	Moore Park Children's Early Learning Centre
72	Childcare	SDN Ultimo TAGE Child and Family Learning Centre
73	Parks & Recreation	Mary Ann Street Park
74	Education	St. Andrews College
75	Childcare	Magic Pudding Child Care Centre
76	Childcare	KU Laurel Tree House Children's Centre
77	Childcare	St. Vincent's Hospital Children's Centre
78	Childcare	SDN Surry Hills Child and Family Learning Centre
79	Education	Australian Institute of Music (AIM)
80	Childcare	Moore Park Gardens Pre-School & Long Day-Care Centre
81	Parks & Recreation	Perry Park
82	Parks & Recreation	Mrs Mollie Swift Reserve
83	Childcare	SDN Linthorpe Street Children's Education
84	Education	UTS – Haymarket City Campus
85	Education	Sydney University, Faculty of Veterinary Science
86	Education	St.Johns College
97	Hospital	Royal Prince Alfred Hospital
99	Childcare	Wattle Lane Children's Centre
100	Parks & Recreation	Mary O'brien Reserve
101	Parks & Recreation	Tote Park
102	Childcare	Moore Park Children's Early Learning Centre
103	Childcare	KU John J Carroll Preschool
104	Childcare	Papilio Early Learning Centre
105	Education	Bourke Street Public School

<b>No.</b>	<b>Category</b>	<b>Name</b>
107	Childcare	Inner City Care Child Care Centre
108	Childcare	Lucas Street Child Care Centre
109	Childcare	Camperdown Child Care Centre
110	Parks & Recreation	Belmore Park
112	Childcare	SNHC Long Day Care
113	Parks & Recreation	Joynton Park
114	Childcare	Active Kids Group Moore Park
115	Parks & Recreation	Shannon Reserve
116	Parks & Recreation	Camperdown Memorial Rest Park
117	Childcare	Kindy Patch Ultimo
119	Education	Newtown Public School
120	Parks & recreation	Hills Reserve
121	Education	Ultimo Public School
122	Education	Sancta Sophia College
123	Education	Australia St Infants School
124	Parks & Recreation	Nuffield Park
126	Childcare	Australia Streets Infants School
127	Childcare	Explore & Develop Alexandria
128	Education	Newtown School of Performing Arts
129	Childcare	Early Achievers Child Care Centre – Glebe
130	Education	Forrest Lodge Public School
131	Parks & Recreation	Moore Park Golf Course
132	Parks & Recreation	Wentworth Park



<b>No.</b>	<b>Category</b>	<b>Name</b>
133	Education	Sydney Girl's High School



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