SGS Economics & Planning

CANTERBURY-BANKSTOWN – DEMOGRAPHIC STUDY

DRAFT
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Prepared for
Canterbury-Bankstown Council

Independent insight.

SGS Economics and Planning Pty Ltd
ACN 007 437 729
www.sgsep.com.au
Offices in Canberra, Hobart, Melbourne, Sydney

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1. INTRODUCTION

SGS Economics and Planning has undertaken a study of the demographics, social profile, growth and associated opportunities for Canterbury-Bankstown Council as part of the LSPS process.

Canterbury-Bankstown Council is embarking on a preparation of a Local Strategic Planning Statement (LSPS) and review of the Local Environmental Plans (LEP), to respond to the strategic directions outlined in the Greater Sydney Region Plan and the South District Plan prepared by the Greater Sydney Commission. These documents and strategies will guide land use development in the Local Government Area (LGA), with the LSPS setting out a 20-year vision, the special character and values that are to be preserved and how change will be managed into the future.

The LSPS presents a significant opportunity for local councils to strategically plan for the future of their LGA it will facilitate the delivery of various strategies and presenting an LGA wide structure plan to ensure that they centres and communities grow in the way they need to and with the infrastructure that they require.

SGS Economics and Planning (SGS) has been commissioned by Canterbury-Bankstown Council to complete a Demographic Study as part of the LSPS process. The purpose of the Demographic Study is to provide strategic context and tell the story of the local government area as it stands at present. It also reveals major trends or proposed projects that will impact on the future of the local area. This is consistent with the LSPS Guideline prepared by the Department of Planning and Environment.

The following chapters outline the content of and process that informed this report, which is aligned with the original request received form Council:

Chapter 2 – Key Insights: outlines the key insights from the policy review and spatial data analysis covering a wide variety of measures and themes.

Chapter 3 – Policy and Planning Context: Review of the relevant plans, policies and documents which are shaping the growth of the Canterbury-Bankstown LGA and the South District as well as research on the impact of mass transit;

Chapter 4 – Population, Households and Dwellings: Analysis and insights based on demographic information for the Canterbury-Bankstown LGA and South District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;

Chapter 5 – Employment: Analysis and insights based on employment information for the Canterbury-Bankstown LGA and the South District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;

2. KEY INSIGHTS

This chapter outlines the key insights derived from the policy review and spatial data analysis covering a wide variety of measures and themes.

2.1 Population, Households and Dwellings

- **A growing area.** Canterbury-Bankstown has grown by almost 46,000 people since 2006 and the population density has risen by 7% with growth occurring almost across the whole LGA. Particular hot spots of development were Canterbury (South) - Campsie, Punchbowl and Yagoona - Birrong (refer to Figure 14: Suburb Population Growth Totals – Map (2016) for detailed breakdown) providing a variety of dwelling types, ranging from single houses (detached dwellings) in Potts Hill to mid-density residential flat buildings in Campsie and Punchbowl.

FIGURE 1: NEW DEVELOPMENTS IN CAMPSIE – VICTA STREET (2018)

Source: www.realestate.com.au

When compared to the Greater Sydney area and South District these represent similar growth trends with slightly higher projected future densities in Canterbury-Bankstown and the South District indicating possible intensification of development in this area.

- **New metro line and urban renewal corridor.** The Stage 2 City & Southwest Metro (Sydenham to Bankstown) – approved in December 2018, will be the focus of this growth. The urban renewal corridor carries the potential to significantly improve access and opportunity, acknowledging the development must be managed to ensure that it also improves liveability for the current and future community. Identified priority precincts

along the metro line are: Canterbury, Campsie, Belmore and Lakemba. Customers will benefit from a new fully-air conditioned Sydney Metro train every four minutes in the peak in each direction with lifts, level platforms and platform screen doors for safety, accessibility and increased security. Although with mixed outcomes, research shows that investments in mass rapid transit usually leads to increased private investment around stations, a boom in office and commercial activities along the line, residential densification, and a greater share of workers commuting via public transportation.

FIGURE 2: ARTISTS IMPRESSION OF SYDENHAM TO BANKSTOWN CORRIDOR

Source: City of Canterbury-Bankstown

- **Long-residing community of 'locals' with noticeable migration rates**. Sixty eight percent of Canterbury-Bankstown residents today also lived in the LGA five years ago - reflecting how locals have established themselves well in the community, regardless of whether that is due to preferences or affordability.
  Apart from being a well-established community of locals' Canterbury-Bankstown is also a hot sport for migration from other parts of Australia (most often surrounding areas) and overseas, creating an increasingly multicultural LGA that caters for diversity. Attractors for such movements are likely to be the area's already established cultural communities acting as anchors for newly arrived migrants, the generally greater housing affordability of the area and access to mass transit and jobs.

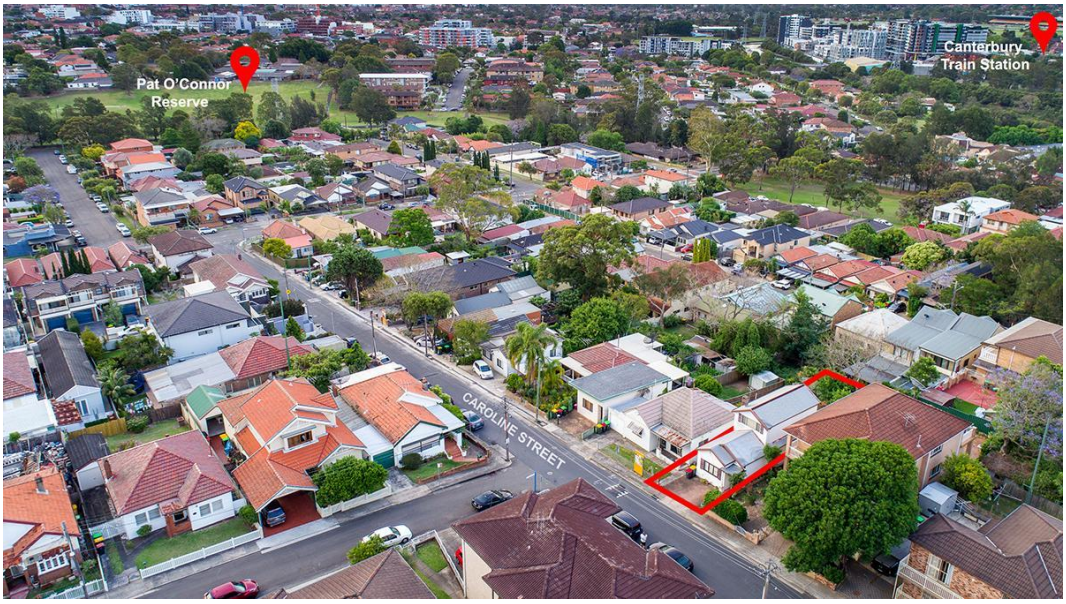
- **Mix of well-established and emerging young workers.** Canterbury-Bankstown is predominately a family area - Couples with Children make up 40% of the households. In conjunction with a considerable influx of migration, this explains the high number of adult and youth aged population in the LGA, making Canterbury-Bankstown one the "younger" councils of Greater Sydney. Beyond 2016, the need to cater for mature aged communities will become increasingly important as the population is projected to age rapidly nationwide with high growth rates forecasted for people over 65.

FIGURE 3: A MIX OF CULTURES

Source: www.shutterstock.com

- **Diversity of places.** Although relatively similar in certain aspects, there are two distinctive community profiles (suburbs) in the LGA. The more mature households are located on the outskirts of the LGA with higher provisions of separate houses – suburbs of Padstow, Kingsgrove (North) - Earlwood, Panania - Milperra and Canterbury (North) - Ashbury. These areas represent established households with larger proportions of Mature Adults (age 45-65) and Retirees (age 65+). Most of these families are going through a transition phase. Children are, or have, reached adulthood and moving out of home while parents are entering a more mature age, approaching retirement and possibly looking to downsize.

FIGURE 4: EARLWOOD (LOW DENISTY SUBURB) CONTRASTED BY CANTERBURY (FLATS AND UNITS)



Source: www.realestate.com.au

Compared to these areas, the inner suburbs (surrounding the CBD and along train line) and less "attractive" areas close to major industrial lands have a higher proportion of Young Adults (age 20-30), Youth (age 5-20) and Children (age 0-5) – suburbs of Bankstown CBD, Lakemba, Wiley Park, Greencare - Mount Lewis and Condell Park. These areas are more attractive to overseas migrants and younger couples due to more affordable and diverse housing as well as the provision of mass transit and good connectivity to the city. This is attractive not only to young couples, but an increasing number of group households.

Multicultural and diverse profile becoming more widespread. The population is growing with a mix of overseas and internal migration, bringing a largely multicultural and diverse population to Canterbury-Bankstown. While there is still a large number of British and Australian peoples in the region, their numbers are declining as a proportion of the population. Arab, Chinese Asian and South Eastern Europeans make up a large majority of ancestries with other Asian populations expected to grow. This change may influence the role and function or cultural identity of Canterbury-Bankstown's local centres through the type of retail and community services in demand.
While English remains a strong language (36.3%), it is declining as the main language spoken at home. Middle Eastern Languages and Chinese dominate households as a combined total of 28%, with Indo-Aryan and Mon-Khmer experiencing the highest growth rates along with Chinese.

FIGURE 5: CULTURALLY DIVERSE YOUNG FAMILY

Source: Urban Institute

- **More people are renting with increases in group households.** The share of households renting has risen by approximately 4% since 2006, becoming the most prevalent tenure type in Canterbury-Bankstown, with outright and mortgage base ownership not far behind. Most households in Canterbury-Bankstown pay $450-$549 in rent, and most household earnings range from $400 - $1,249 per week (equivalised).
  The number of group households rose by approx. 2,000 since 2011 and has grown in the overall proportion (+2%) with Canterbury (South) - Campsie being a particular hotspot. This trend is slightly higher in Canterbury-Bankstown when compared to the South District and Greater Sydney pointing to ongoing housing affordability issues.

- **Homeowners are consolidating their land**. Semi-detached housing and high-density living have risen since 2006, suggesting that homeowners have capitalised on the opportunity to subdivide their lots, add more dwellings to their existing lot or have had their properties acquired by developers for higher-density development.

FIGURE 6: EXAMPLE OF SEMI-DETACHED HOUSE IN CANTERBURY-BANKSTOWN AND TRAFFIC JAM ON CANTERBURY ROAD

Source: www.realestate.com.au and Daily Telegraph

- **Residents are becoming increasingly car-dependent**. While the number of households owning motor vehicles is high, the number of households with three, four or more motor vehicles is increasing. This is interesting considering the commitment to future transport and the existing transport accessibility, possibly pointing to peoples preferences towards mobility and private vehicles.

2.2 Employment

- **A quarter of working residents are employed locally.** Approximately 25% of residents that are employed also work within the boundaries of the LGA, reflecting a mid-range self-containment rate. One of the often-stated goals of local government economic development is to maximise self-containment of employment. In our cities, a lot of employment is concentrated in just a few areas (e.g. CBDs and major industrial precincts). This can lead to some suburbs being mainly dormitory areas, with commuters adding to road and public transport congestion and reductions in quality of life for residents. So, the goal of self-containment is to create jobs in the area which employ local people, becoming more economically, socially and environmentally sustainable[1]. Most local jobs are in the suburbs of Bankstown, Condell Park, Canterbury (South) - Campsie, Chullora and Greencare - Mount Lewis.

FIGURE 7: CONDELL PARK

Source: http://www.carealestate.com.au

- **Transitioning to a professional and health services economy**. Most residents work in population serving and knowledge intensive Jobs, which employ over 60% of Canterbury-Bankstown's residents. Health and education is increasingly taking up a larger proportion of Canterbury-Bankstown's workforce (4% proportional increase between 2006 and 2016), as well as jobs within the LGA (6% proportional increase between 2006 and 2016). Industrial jobs within the LGA are also declining at a faster rate than Greater Sydney averages, which is interesting given the large amount of industrial land in the LGA. The overall shift towards health and education jobs follows wider economic trends present in Greater Sydney with an increasing focus on health-related employment - mainly as a result of an ageing population.

[1] https://blog.id.com.au/2011/how-to/what-is-employment-self-containment/

FIGURE 8: A GROWING HEALTH SERVICE ECONOMY

Source: World Health Organisation

- **Major employment hubs are popular working destinations.** The City of Sydney and Parramatta account for over 32% of work destinations for Canterbury-Bankstown's residents, meaning Council may need to consider how connected and accessible they are to those centres in the future as the LGA grows. Future committed transport will help to support this (e.g. Sydney Metro City & Southwest, identified city shaping corridor to Paramatta in Future Transport 2056). The Inner West is also a popular employment location given its close proximity to the LGA.

- **Part-time work preferences are increasing**. While full-time work accounts for one third of Canterbury-Bankstown's residents, part-time work has increased compared to other employment types by over 3% from 2006. This may reflect a change in resident's domestic priorities. However, the "casualisation" of the workforce is also a nation-wide economic trend with an increasing number of employers looking for flexible working arrangements and preferring part-time employment for their employees. Council may need to investigate how best to cater for these complex household structures and working arrangements.

FIGURE 9: CASUALISATION OF THE WORKFORCE

Source: fotolia.com

- **The growth of various occupations is being driven by health care.** Health and education is the fastest growing employment sector. In terms of both Canterbury-Bankstown residents working outside the LGA and within, approximately 50% of community and personal service workers work within health care and social assistance[2]. Clerical and

[2] Result of further cross tabbing ABS Census data.

administrative workers is also growing as an occupation within the LGA. This suggests that health and education is employing a variety of occupations and not specifically health care professionals.

- **Declining industrial and trade profile of the area despite strong presence.** Technicians and trade workers is declining as a dominant occupation amongst Canterbury-Bankstown's workers, along with machine operators and drivers (combined drop of approximately 4% from 2006). However, the Industrial sector still covers almost a third of jobs in the LGA. Given the industrial lands policy is to retain and manage (and in some cases, expand) industrial land, Council may need to investigate whether intervention is needed to ensure the industrial jobs (or at least land uses) remain in the LGA.

FIGURE 10: INDUSTRIAL WORKERS AT WORK

Source: The Good Man Project

- **Private vehicle use is still very strong, despite rise in public transport use.** Sixty five percent of local residents use motor vehicles to travel to work, while 78% of commuters working within Canterbury-Bankstown also use their private vehicles to travel to work. However, the use of public transport has risen by +4% compared to other modes of transport, to account for 22.3% of residents. This still represents only a third of the amount of locals travelling with private vehicles to work. There is an opportunity to increase the use of public transport with the delivery of the Sydney Metro City & Southwest and reduce traffic congestions produced by high private vehicle rates.

3. POLICY AND PLANNING CONTEXT

This section of the report reviews a set of strategically important planning documents from different levels of government and agencies

Greater Sydney Region Plan

The Greater Sydney Commission's Greater Sydney Region Plan (GSRP) is a metropolitan strategy that seeks to align the provision of infrastructure investment and services with growth trends. It envisions Sydney as a *Metropolis of Three Cities:* the Western Parkland, Central River and Eastern Harbour City. Under this vision, Sydney would be a 30-minute city, with everyone able to access jobs, services and major centres.

The Plan seeks to deliver this vision through ten directions with associated objectives, priorities and actions to make Sydney more liveable, productive and sustainable. Given that Canterbury-Bankstown is located across the Central River and Eastern Harbour City, the drivers of growth and change in these areas are relevant to Canterbury-Bankstown's future planning strategies.

725,000 additional homes are needed to meet the growing needs of Greater Sydney over the next 20 years, with the South District (the Canterbury-Bankstown, Georges River and Sutherland Shire Local Government Areas) required to provide 23,250 homes by 2021 and 83,500 by 2036. The vision broadly identifies major urban renewal areas, places near major transport infrastructure projects and centres as appropriate locations for new housing.

Sydenham-Bankstown is identified as an urban renewal corridor with the potential for transit-oriented development to complement the upgrade of the T3 Train Line to Sydney Metro South-West. Other opportunities are discussed along the T8 Line, in Bankstown which is identified as a health and education precinct and collaboration area, in the strategic centre of Campsie, and along future mass transit connections from Bankstown to Greater Parramatta, Liverpool and Kogarah which are to be under investigation over the next 20 years.

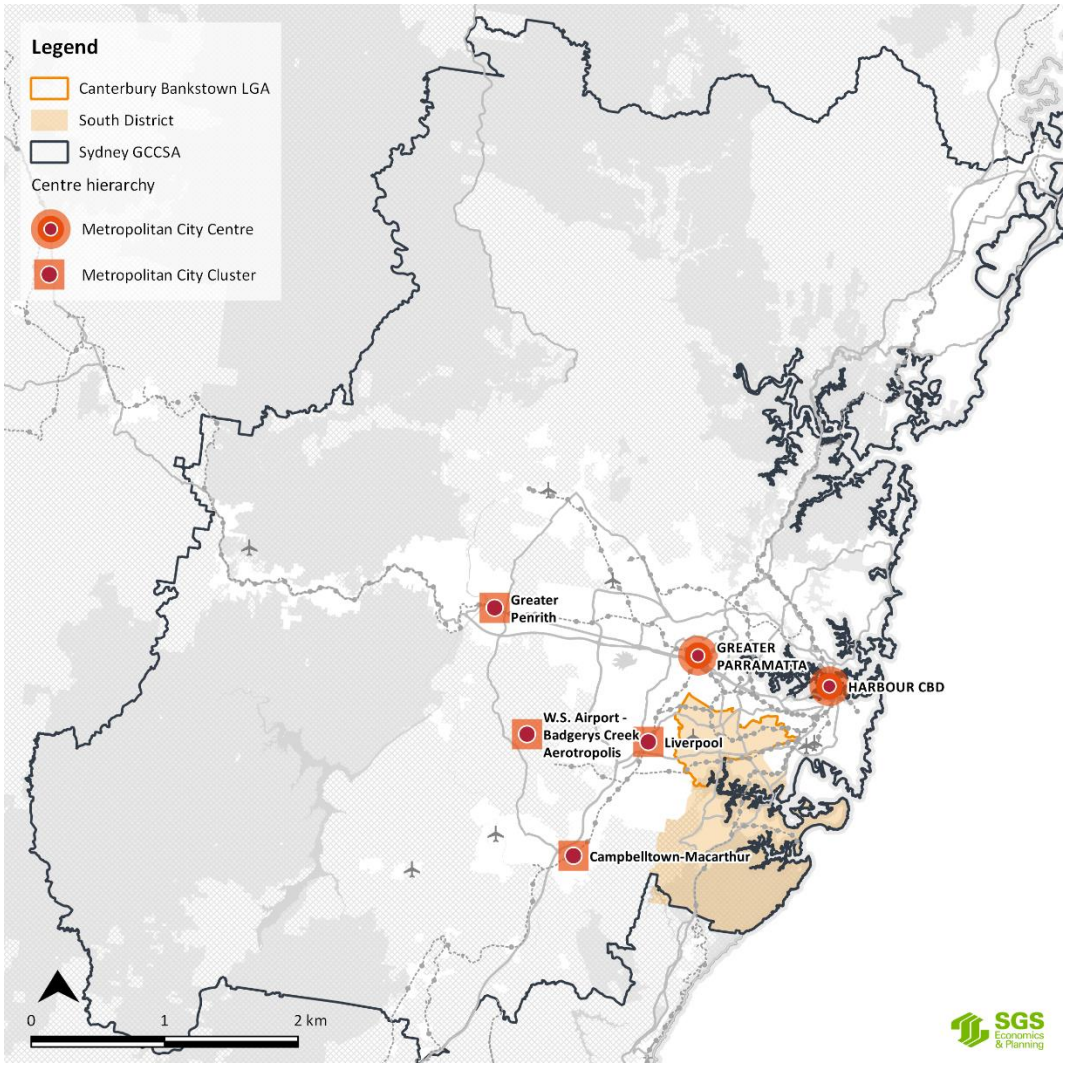
Strategic directions within the GSRP which may have implications for the demographics of Canterbury-Bankstown include:

- Providing an increased supply of housing that is diverse and affordable, which would meet the needs of the Council's different households.
- Celebrating and retaining diversity of people in our cities, and providing services to meet their changing needs, for which the Council will need an understanding of the likely demographic mix in the Council in future.
- Strategic centres seeking co-location of a wide mix of land uses including residential,
- Urban renewal to occur close to existing centres, including the Sydenham to Bankstown rail corridor
- Employment expansion at the Greater Bankstown Collaboration Area, increasing the number of jobs in advanced manufacturing, aviation and electronics
- The Bankstown Health and Education Precinct seeking to deliver adjacent retail and other services such as hotel type accommodation. This could increase the number of students and health workers who live nearby.

South District Plan

The South District Plan (SDP) implements the GSRP's strategic directions with more detailed directions and planning priorities to be implemented in local planning for the South District, including the Georges River, Canterbury-Bankstown and Sutherland Shire LGAs.

FIGURE 11: GREATER SYDNEY AREA AND SOUTH DISTRICT (2016)



The Plan identifies strategic priorities for the Canterbury-Bankstown LGA including transit oriented development at local centres along the Sydenham to Bankstown urban renewal corridor at Punchbowl, Lakemba, and Canterbury, and the continued development of Bankstown and Campsie as strategic centres. All industrial land in the District is to be retained.

The Plan sets a strategic 20-year housing target of 83,500 additional dwellings for the South District between 2016-2036. To accommodate population growth, a housing supply target of 13,250 additional dwellings between 2016-2021 has been set for Canterbury-Bankstown, 57% of the South District total. If this proportion is replicated over a longer time-frame, a substantial population increase in Canterbury-Bankstown would be expected.

As Canterbury-Bankstown contains little undeveloped land and industrial land is to be retained, most of this growth will need to occur through infill development and renewal of centres. New homes are be built around centres with good transport connections and to accompany infrastructure investments.

The SDP recognises several other drivers of change and growth trends within the Canterbury-Bankstown LGA which may affect its demographics. These include a **diverse and ageing**

population, with growth in older age groups projected to outpace the substantial growth expected across the rest of the age spectrum. Economic development and increases in the local provision of education services may also impact the area's desirability and local demographics.

Some of the changes in population and related strategic directions identified in the SDP include:

- The number of residents aged 65 and over growing by 61% in the South District with Canterbury-Bankstown containing over half of those additional people (35,900 from a total of 68,650)
- 90% of additional young people and children in the South District will be targeted for Canterbury-Bankstown, increasing need for additional early education, childhood facilities and schools
- Canterbury-Bankstown is projected to contain the largest growth of people aged 20-24 years (36%) between 2016 and 2036 in the South District, increasing need for additional tertiary education facilities and related services
- The number of single person households in the South District is expected to increase by 46% over the 20 years to 2036
- The number of single parent (34%) and couple only (32%) households are also expected to increase in the South District
- The LGA is identified as a diverse region with 64% of people speaking 91 languages other than English whilst Arabic, Vietnamese and Greek are the most common
- Diverse and affordable housing is the strategic direction identified in order to meet the demands of a diverse and ageing population, including multi-dwelling homes along rail lines that can act as transitional housing for seniors, homes for small households and more affordable homes for young people and families, as well as medium density development below the M5 Corridor to provide more diversity in housing.

Some of the education and employment trends the SDP identifies within Canterbury-Bankstown include:

- Western Sydney University re-locating its Milperra campus to the Bankstown CBD, increasing the presence of students in the LGA's CBD and driving the need for student-based services to be provided.
- The increase of knowledge-intensive persons and industrial workers in the region, particularly within the Greater Bankstown Collaboration Area
- The growth of the Bankstown-Lidcombe medical hub which may lead to growth of high wage local employment in the area

Future Transport 2056

Future Transport 2056 is Transport for NSW's overarching strategy to deliver transport infrastructure investment over the next 40 years. The vision is built on the following six outcomes:

- Customer Focused
- Successful Places
- A Strong Economy
- Safety and Performance
- Accessible Services
- Sustainability

Sydney Metro South-West is a committed transport project due to be delivered over the forthcoming years. The Strategy also identifies city shaping corridors to Paramatta, Liverpool and south-east towards Kingsgrove and Hurstville/Kogarah by 2056.

A Rapid Bus Link from Parramatta to Bankstown to Hurstville/Kogarah is identified for investigation over the next 10 years, with the route potentially being considered for a Mass

Transit/Train Link in the longer term. A Metro extension to Liverpool is identified as a visionary initiative by Transport for NSW over the next 20+ years.

Completion of the major transport infrastructure projects discussed in *Future Transport 2056* but not yet committed to by the NSW Government or in planning would likely be accompanied by intensive redevelopment. This would change the demographic characteristics of the areas around these projects, with consequences for the level and type of services that the Council needs to provide.

Sydenham to Bankstown Urban Renewal Corridor Strategy (2017)

The Sydenham to Bankstown Urban Renewal Corridor Strategy was the DPE's framework for redevelopment along the Sydenham to Bankstown rail corridor in response to the Sydney Metro South-West project. Since the completion of the Strategy, its implementation has been halted in favour of a partnership process with local governments, the results of which are yet to be published.

The Corridor Strategy proposed changes to land use and built form controls that would provide over 35,000 dwellings to be constructed across 11 Station Precincts over the next 20 years.

The Canterbury-Bankstown LGA contains 8 of the 11 Station Precincts, including Bankstown, Punchbowl, Wiley Park, Lakemba, Belmore, Canterbury, Campsie and Hurlstone Park. Bankstown and Campsie were expected to deliver 6,000 additional dwellings each by 2036, with approximately 15,000 additional dwellings spread across the rest of the Station Precincts contained in the LGA. The Strategy noted short-term market preferences towards living in Canterbury and Campsie, with Lakemba and Wiley Park projected to develop more strongly in the medium to long-term.

The Strategy planned for homes and supporting infrastructure focused in local centres along the corridor. Any amenity improvements to local centres or to the operation of the railway line may increase demand for housing in the area. However, this could displace existing residents and a shift to smaller housing could impact the ability of families to locate close to these centres.

The SDP advocates for multi-unit housing along the rail lines in order to meet housing demand while delivering diverse and affordable homes. This would have been implemented through the Strategy by creating a mix of high, medium, and lower density typologies along the entire corridor.

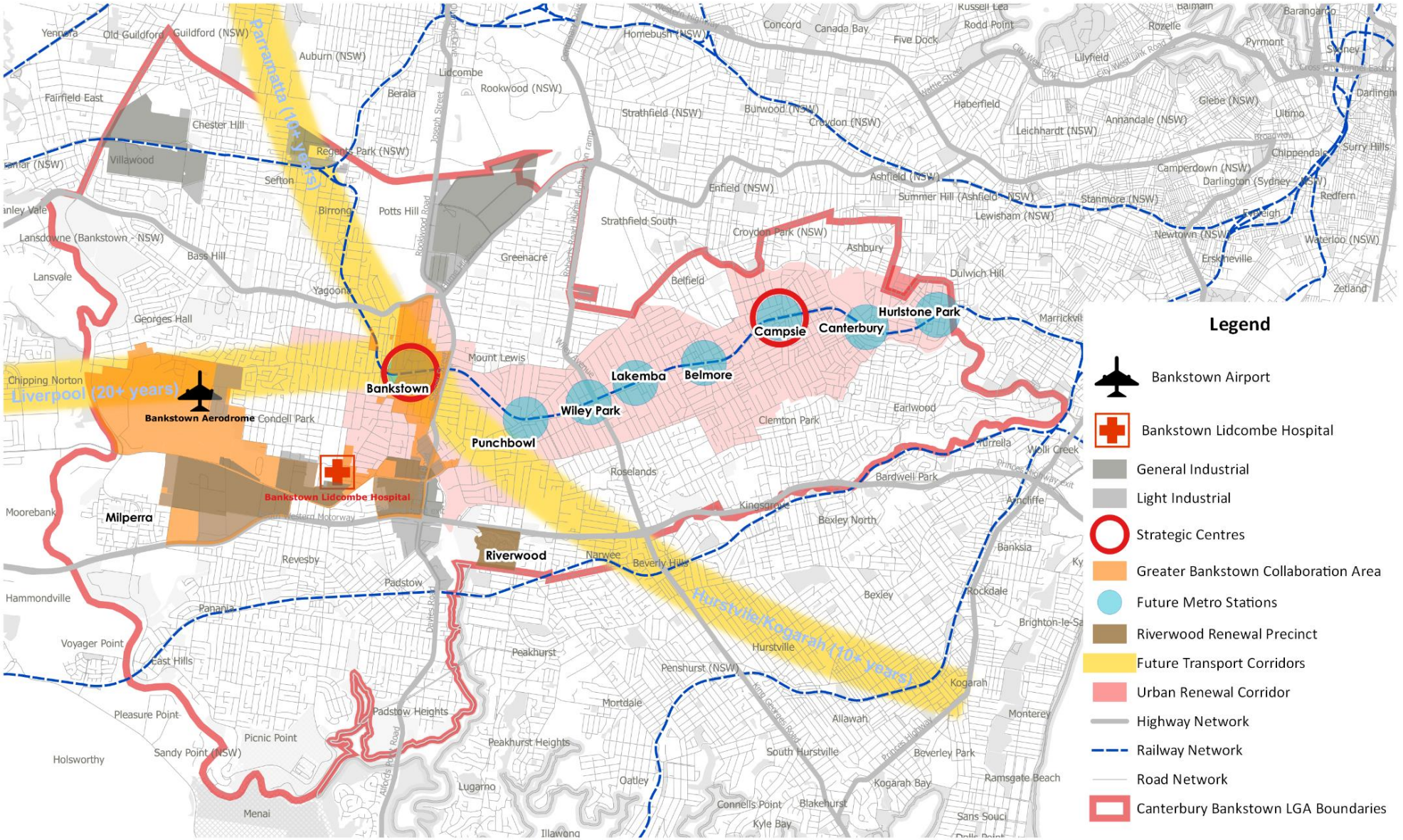
In addition, 7,139 additional jobs were expected within the corridor, increasing the amount of local employment in the LGA.

Riverwood Renewal- Communities Plus

Communities Plus is a state government program working with the private, non-government and community housing sectors to deliver mixed-tenure redevelopments of public housing estates in which the amount of social housing is not decreased. The redevelopment of Riverwood under this program is underway, creating a mix of private and social housing at a 70:30 ratio. The redevelopment is proposed to continue.

Promotional material about the Communities Plus Development states that there are currently 994 social housing dwellings in Riverwood and that this number projected to increase by 20% as a result of the redevelopment. However, no timeframe is provided for this. The intention is for redevelopment to include modern standards for mobility-impaired and seniors housing, as older residents comprise a significant portion of current Riverwood residen

FIGURE 12: PLANNING CONTEXT – CANTERBURY-BANKSTOWN AND SURROUNDINGS



Canterbury-Bankstown Policy Review Map

Areas of Change and Growth into the Future

0 1 2 km

Canterbury Road Review

The *Canterbury Road Review* is a review of the development along the Road given the high traffic and freight volumes and concerns about overdevelopment and the built form. It seeks to improve the public domain and the design and quality of development along the road.

The review recommends that Council adopt a revised vision for the Corridor with seven identified junctions containing concentrations of mixed-use development. Multi-dwelling housing would be built in 11 other localities.

The Review plans for almost 10,000 new dwellings comprised of 3,792 additional dwellings in the junctions and 6,154 dwellings in the locatities. This would provide housing choice which could accommodate people of diverse ages, income levels and housing preferences.

CBCity 2028 (Community Strategic Plan)

CBCity 2028 is Canterbury-Bankstown's Community Strategic Plan (CSP) and has a vision of a "thriving, dynamic city of people". The Plan contains seven directions for the Council, including for a community that provides for the needs of people and values their culture, religion and heritage.

The first direction of the Plan, a city that is 'Safe & Strong', aims for an inclusive community. This would require planning for a diverse range of languages, cultures and lifestyles across the LGA.

Greater Bankstown Collaboration Area- Bankstown City Centre and Bankstown Airport-Milperra (Draft November 2018)

The Greater Bankstown Collaboration Area aims to maximise the economic productivity resulting from proximity between housing, education, commercial and retail activity, and employment.

Council has marketed the Collaboration Area as a 'one stop shop' for migrants, with economic and education opportunities in Greater Bankstown. This is aligned with the CSP's stated desire for an inclusive community.

Over the coming years, Bankstown will more than double the number of students, jobs and residents to 18,000, 25,000 and 40,000 respectively. As such, the Greater Bankstown Collaboration Area outlines several initiatives from various stakeholders to accommodate growth. These include: supporting DA approval for higher density development, rezoning the former WSU Milperra Campus to a mix of commercial, retail and residential uses, developing a WSU campus in the Bankstown CBD to accommodate 19,000 students, transport improvements identified in *Future Transport 2056*, retaining the Bankstown Airport and Milperra Industrial area which supports 15,700 jobs in manufacturing, aviation and electronics.

How mass rapid transit affects an area

SGS carried out a literature review to see how mass rapid transit affects an area. A number of international examples were drawn upon, particularly Canadian and US cities due to their similar socio-political contexts. The results were mixed and inconsistent, highlighting the importance of context when considering the impact of mass rapid transit.

The literature review found supporting arguments that investment in mass rapid transit leads to increased private investment around stations, a boom in office and commercial activities along the line, residential densification, and a greater share of workers commuting via public transportation. Vancouver found that the introduction of the Canada Line surpassed original expectations for patronage, which may occur in Canterbury-Bankstown with more convenient and accessible access to the Harbour CBD on offer. Displacement did indeed occur

particularly during construction in US cities, however, those residents didn't move too far away.

The review also found that, in some US cities, investment in rail transit has no 'significant' effect on population density, housing value, or employment structure around stations. Meanwhile they found that median incomes decreased around stations in the US, an increased variety of people of different ethnic backgrounds, and a decrease in proportion of people working from home. in Atlanta, the heavy rail system increased home values in low-income neighbourhoods but decreased home values in higher-income areas because of the noise and traffic at the transit stations. Along the Washington DC Metro Line, rent premiums were more evident in the older and more deteriorated sections of downtown. How mass rapid transit has affected US cities in an inconsistent way suggests that the impact of Sydney Metro South-West has a degree of uncertainty surrounding it.

Furthermore, the review also found that new rail transit stations help disadvantaged populations more, as the value of their properties are uplifted, or wealthy persons move away because of negative externalities associated with the rail investment (noise, increased vehicle and foot traffic). Minorities locate near the stations because of the accessibility and opportunities associated with the locations.

One study suggested that linking rail transit investment with pedestrian improvement (as well as providing seamless transfers to other transportation modes) could promote better connectivity and encourage more people to commute.

Another interesting insight that the review found was that it was not station proximity that was driving house prices. Rather, the rent premium was due to additional housing features such as the number of bathrooms in a dwelling unit, the size of the parcel, and location of the houses.

Suburban stations, similar to the context of Canterbury-Bankstown's proposed Metro stations, are more likely to have an increase in retail employment.

Overall, the review found that if the goal of investing in mass urban transit is to provide access to jobs and opportunities to the disadvantaged, then investment is justified.

FIGURE 13: ARTIST IMPRESSION OF SYDNEY METRO

Source: sydneymetro.info

The key insights relevant to Canterbury-Bankstown's demographic services around Sydney Metro South-West from the literature are as follows:

- Increased private investment around stations may invite displacement. The review found that rail investment increased private investment around stations. Given that the overall objective of Sydney Metro South-West is to provide faster and more convenient access to the Sydney CBD from suburban stations, private developers may be attracted to investment in properties along the line. In turn, residents may become vulnerable to lucrative offers for their property, and find themselves needing to live elsewhere. Council

may need to make a decision about whether they need to intervene, and if displacement were to occur, how their approach to demographic services would change.

- **Office and commercial activity may boom along the line, however, retail employment is more likely.** The review found that, aided by the increased level of private investment, office and commercial activity boomed along the urban mass transit lines in Canadian and US cities. However, many of the cities were in the central city, or near airport lines. Around suburban stations, similar to Canterbury-Bankstown's Metro station locations, retail employment was found to increase.

- **Likely to aid 'poor' and 'disadvantaged' populations more, especially in terms of accessing jobs and opportunities.** While rail investment did not have a significant effect on housing value in some US cities, investment generally aided the poor and disadvantaged populations more. This is because wealthier households would move away due to increased negative externalities such as noise and traffic, and low-income neighbourhoods were more likely to experience an increase in the house price. Moreover, faster and more convenient access via public transport provides the wider public, rather than a select few, with greater connectivity.

- **Pedestrian experience may have an impact on increased public transport share.** The review found that, generally, public transport share increased with investment in mass rapid transit. However, the review also found that pedestrian improvements could promote better connectivity and encourage a greater number of people to commute via public transport. Council may be strongly encouraged to consider the walkability of its stations, especially given there is a high car dependency in the LGA that may be unsustainable in the future.

- **Rent premiums are driven by additional housing features around stations as well as station proximity.** The number of bedrooms and bathrooms in a dwelling/unit near stations, the size of the land, and location are all factors in determining the level of rent that can be commanded from a property. Location is not the only factor. Council may need to make a decision about the type of housing and, in turn, the rent premiums they would like to see along the Sydney Metro South-West Line in Canterbury-Bankstown.

4. POPULATION, HOUSEHOLDS AND DWELLINGS

This chapter analyses a number of population, households and dwellings based measures and indicators, pointing to historical and forecasted trends, insights and future directions for the LSPS studies

Disclaimer: When comparing growth rates between multiple time periods, Compound Annual Growth Rate (%) has been used. The Compound Annual Growth Rate (CAGR %) is a useful measure of growth over multiple time periods. It can be thought of as the growth rate that gets you from the initial value to the ending value.

As Census data (2006-2016) has exclusively been used for reporting historical data/trends in this study, this can be imagined as a Compounded *Census* Growth Rate, representing growth rates at five year increments. The same can be applied for future projections (TPA data), representing a forecasted growth rate each five years.

For more information, please reference: https://www.investopedia.com/terms/c/cagr.asp

Percentage Point (PP%) – represents the difference between two percentages. Percentage point is used to show the changes in an indicator with respect to its previous standings (e.g. between growth rates in 2016 and 2011);

Due to differences in methodology and the way data is captured, direct comparisons between absolute ABS historical data values (2006-2016) and TPA forecasts (2021-2036) is strongly discouraged. It is recommended to use general trends and proportions when observing future trends and comparing across. There is also limited comparison for some indicators over Census periods due to changes in how ABS captures data;

Place of Usual (PUR) - some undercounting inevitably occurs for various reasons during Census count. Although adjustments are available for certain indicators in the form of Estimated Resident Population (ERP) these haven't been used in this report, in order to achieve consistency across all indicators;

Place of Work (POW) - ABS has introduced a new imputation method in 2016 for assigning workplace destination (Destination Zones) to persons that provided partial or no information about their place of work. The imputed data was excluded from this report, in order to achieve compatibility across previous Census years and 2016;

Broad Industry Category (BIC) - represents Greater Sydney Commission (GSC) broad categorisation of 1 digit ANZSIC industries;

Some discrepancies might be present in the Suburb level data, due to changes in ABS geographies between 2011 and 2016;

Totals derived from summing up suburb level data are slightly different to LGA totals due to ABS perturbations applied to protect the confidentiality of individuals;

Note:

- Greater Sydney will be referred to as GS
- South District will be referred to as District

IMPORTANT: Read disclaimer prior to commencing analysis

4.1 Number of People and Population Density

Key Points

- Historical *population* growth of about +45,850 - additional +7.3% each 5 years (2006 to 2016)
- Higher growth rate compared to South District (+6.1%) but lower than GS (+8.5%)
- *Density*[3] is also increasing - by +6.7% from 2011 to 2016
- Current *density* (3,805 people per km²) is higher than District (3,504 per km²) and Greater Sydney (2,623 per km²)
- Projected growth to occur at a greater rate (+9%), than District (+6.3%)

Local Context

Number of People

The most populous suburbs of Canterbury-Bankstown are *Canterbury (South) - Campsie* and *Bankstown* (both around 30,000 people). These are followed by *Punchbowl* (26,050) and a large number of suburbs with between 15,000-25,000 people.

Apart from being the most populated precinct, *Canterbury (South) – Campsie* has also experienced the largest growth (+3,789). Other fast-growing suburbs (above average rate) are *Yagoona - Birrong* and *Punchbowl* (5 year growth rate of about +14%).

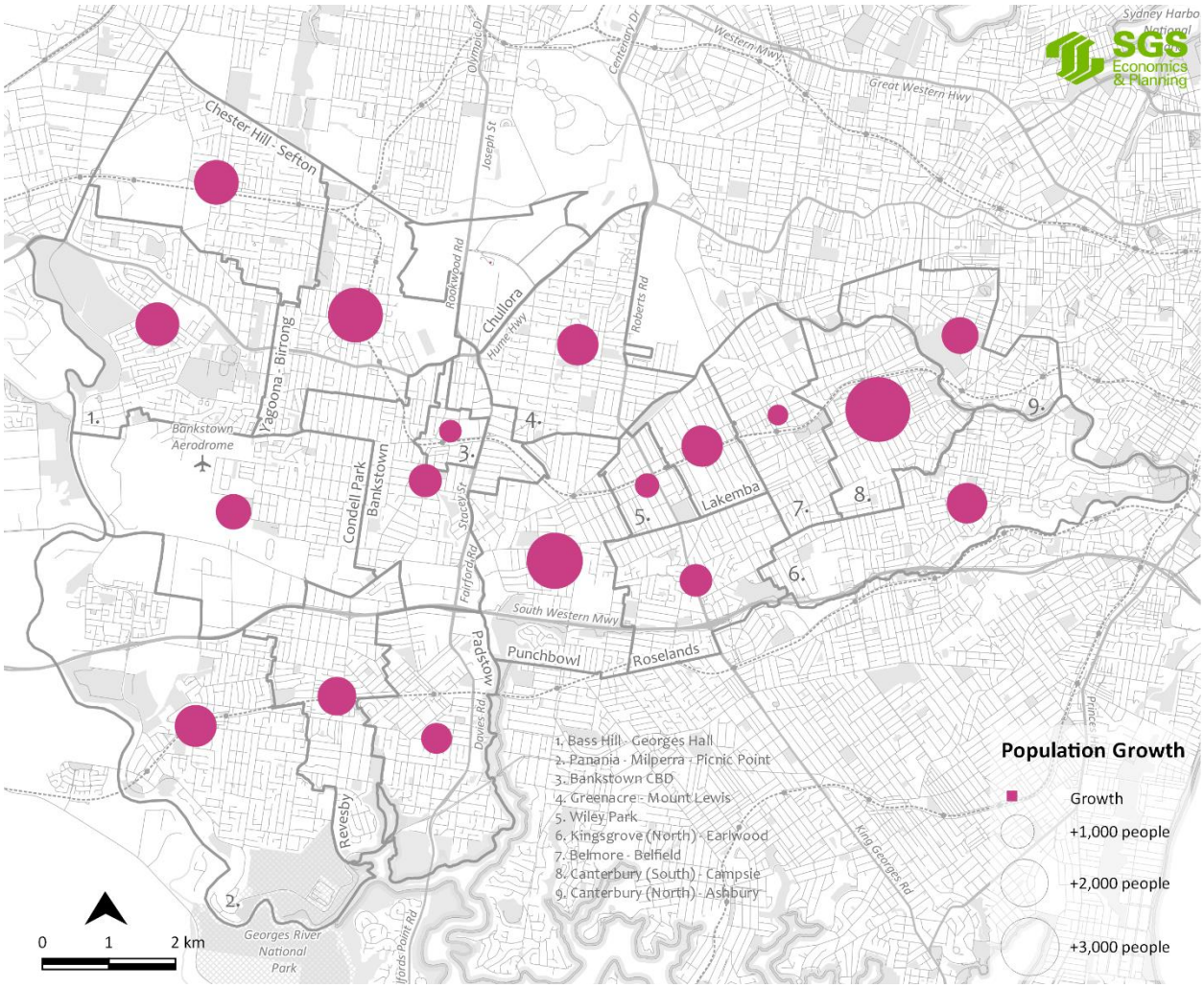
TABLE 1: SUBURB POPULATION TOTALS AND GROWTH RATES (2011-2016)

Geography	2011	2016	Growth	Growth (%)
Canterbury (South) - Campsie	26,840	30,629	3,789	14%
Bankstown	27,335	28,313	978	4%
Punchbowl	23,219	26,050	2,831	12%
Panania - Milperra - Picnic Point	24,206	25,786	1,580	7%
Greenacre - Mount Lewis	22,888	24,418	1,530	7%
Kingsgrove (North) - Earlwood	22,229	23,700	1,471	7%
Yagoona - Birrong	19,656	22,328	2,672	14%
Bass Hill - Georges Hall	20,093	21,824	1,731	9%
Chester Hill - Sefton	16,669	18,468	1,799	11%
Belmore - Belfield	17,239	17,634	395	2%
Lakemba	15,515	17,043	1,528	10%
Roselands	15,917	16,870	953	6%
Padstow	15,619	16,478	859	5%
Revesby	14,872	16,222	1,350	9%
Canterbury (North) - Ashbury	13,649	14,886	1,237	9%
Condell Park	10,184	11,304	1,120	11%
Wiley Park	9,689	10,223	534	6%
Bankstown CBD	3,469	3,932	463	13%
Chullora	-	6	6	-

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

[3] Area is calculated by using built form only, as defined in ABS Meshblocks (excluding national parks, agriculture land etc.)

FIGURE 14: SUBURB POPULATION GROWTH TOTALS – MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

LGA trends and Comparison

Number of People

Canterbury-Bankstown has experienced a population growth of +45,850 over the past 10 years (compounded increase of +7.36% each five years). Compared to Greater Sydney (GS) and the South District (District) this represents a middle-ground growth rate. The population increase was noticeably greater between 2011-2016 than 2006-2011.

TABLE 2: POPULATION TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (%)
Greater Sydney	3,821,233	4,079,432	4,496,184	674,951	8.47%
South District	632,162	665,324	711,599	79,437	6.10%
Canterbury-Bankstown	300,450	319,804	346,300	45,850	7.36%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Population Density

Canterbury-Bankstown's density has also increased (from 3,566 to 3,805 people per km²) between the Census periods (+6.72%) at a much higher rate than Greater Sydney, and similar the South District.

TABLE 3: DENSITY TOTALS AND GROWTH RATES (2011-2016)

Geography	2006	2011	2016	Growth (%)
Greater Sydney	N/A	2,560	2,623	2.49%
South District	N/A	3,298	3,504	6.25%
Canterbury-Bankstown	N/A	3,566	3,805	6.72%

Source: ABS Census 2011 and 2016 (TableBuilder Pro), DPE - Standard Instrument Local Environmental Plan (LEP) - Land Use Zoning (LZN), 2018

Future Projections

Canterbury-Bankstown's population is expected to grow by an additional 112,869 between 2021 and 2036. This represents an increase of 8.9% each five years. Compared to the previous growth rate (7.36%), growth is predicted to be at a slightly higher rate in the future. The differences between the District and LGA growth rates are also slightly increasing, with the LGA projected to grow at a faster rate than both regions.

TABLE 4: FORECASTED POPULATION TOTALS AND GROWTH RATES (2021-2026)

Geography	2021	2026	Growth 21-26	2031	Growth 26-31	2036	Growth 31-36	Total Growth	CAGR (%)
Greater Sydney	4,976,423	5,397,508	421,085	5,810,257	412,749	6,257,861	447,604	1,281,437	7.94%
South District	775,832	825,242	49,410	877,148	51,906	931,683	54,535	155,851	6.29%
Canterbury-Bankstown	387,021	423,036	36,015	460,530	37,494	499,890	39,360	112,869	8.90%

Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

4.2 Age Profile

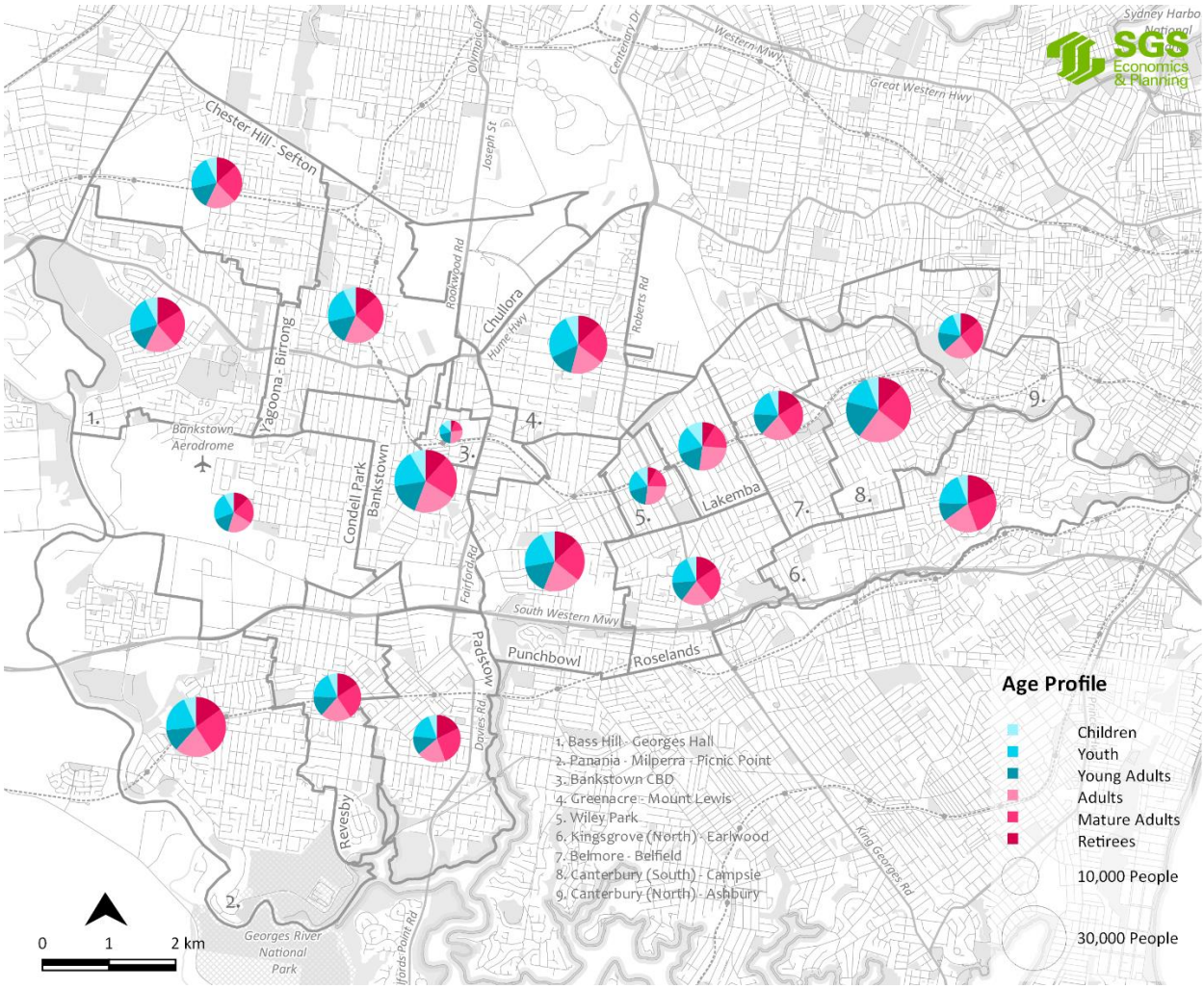
Key points

- Growth across all age groups[4]
- Higher ratio of *Mature Adults, Adults* and *Youth* in overall age structure – similar levels and trends when compared to District and GS
- Overall structural changes inclined to increasing proportion of *Young Adults* and *Mature Adults*, with *Youth* and *Adults* declining

Local Context

Most of Canterbury-Bankstown's suburbs have a similar split of age groups (most likely attributed to relatively homogenous urban morphology). However, there is a distinction between some of the inner suburbs, surrounding the CBD and along train line, that have a higher proportion of *Young Adults, Youth* and *Children* (*Bankstown CBD, Lakemba, Wiley Park*) and *Youth* (*Greencare - Mount Lewis* and *Condell Park*) and "outer-bordering" areas of the LGA (*Padstow, Revesby, Kingsgrove (North) - Earlwood, Panania - Milperra*) with larger proportions of *Mature Adults* and *Retirees*.

FIGURE 15: SUBURB AGE PROFILE TOTALS – MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

[4] Age profile definition and reasoning: Children 0-5 (still out of school system); Youth 5-20 (mostly still living with parents); Young Adult 20-30 (starting to move out, becoming independent, saving for deposit); Adult 30-45 (starting a family, buying a house); Mature adults 45-65 (moving to better neighbourhood, settling long term, less mobile); Retirees 65+ (mainly out of work force)

TABLE 5: SUBURB AGE PROFILE TOTALS (2016)

Geography	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Canterbury (South) - Campsie	1,805	4,633	5,804	7,415	7,189	3,738
Bankstown	2,325	5,460	4,738	6,108	6,310	3,262
Punchbowl	1,857	5,367	4,183	5,271	5,870	3,380
Panania - Milperra - Picnic Point	1,713	5,179	3,052	5,319	6,644	3,887
Greenacre - Mount Lewis	1,779	6,091	3,376	4,563	5,481	3,158
Kingsgrove (North) - Earlwood	1,382	4,434	2,470	4,823	6,038	4,485
Yagoona - Birrong	1,646	4,710	3,295	4,395	5,221	2,969
Bass Hill - Georges Hall	1,620	4,843	2,836	4,119	4,896	3,532
Chester Hill - Sefton	1,289	3,981	2,667	3,555	4,484	2,454
Belmore - Belfield	1,102	3,153	2,504	3,765	4,278	2,803
Lakemba	1,851	3,267	2,992	4,404	2,925	1,492
Roselands	1,127	3,291	2,276	3,491	4,071	2,572
Padstow	955	2,866	2,114	3,206	4,348	2,899
Revesby	1,046	2,966	2,240	3,368	4,066	2,523
Canterbury (North) - Ashbury	876	2,490	2,126	3,497	3,845	2,065
Condell Park	910	2,574	1,621	2,356	2,399	1,430
Wiley Park	1,065	1,950	1,895	2,691	1,807	806
Bankstown CBD	524	601	784	1,109	650	236
Chullora	-	-	-	-	-	-

Source: ABS Census 2016 (TableBuilder Pro)

LGA trends and Comparison

Canterbury-Bankstown is growing strongly across all age categories, with highest growth totals and growth percentages (%) in *Mature Adults* and *Young Adults*.

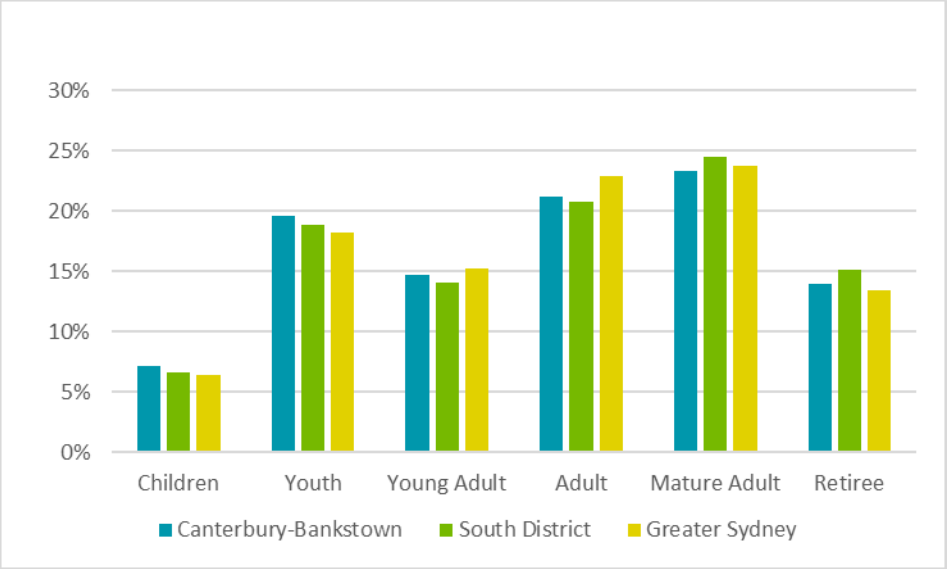
TABLE 6: AGE PROFILE TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
2016	24,976	67,925	50,982	73,425	80,746	48,257
2011	24,232	63,808	45,307	67,664	75,233	43,557
2006	22,166	61,600	41,352	65,738	68,263	41,341
Growth (Total)	*2,810*	*6,325*	***9,630***	*7,687*	***12,483***	*6,916*
Growth (CAGR %)	*6.15%*	*5.01%*	***11.04%***	*5.69%*	***8.76%***	***8.04%***

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Canterbury-Bankstown has a slightly larger proportion of *Youth* (+0.8% to District; +1.4% to GS) and *Children* (+0.6% to District; +0.7% to GS) compared to the other areas. On the other hand, Canterbury-Bankstown has a slightly smaller proportion of *Mature Adults* (-1.2% to District; -0.4% to GS).

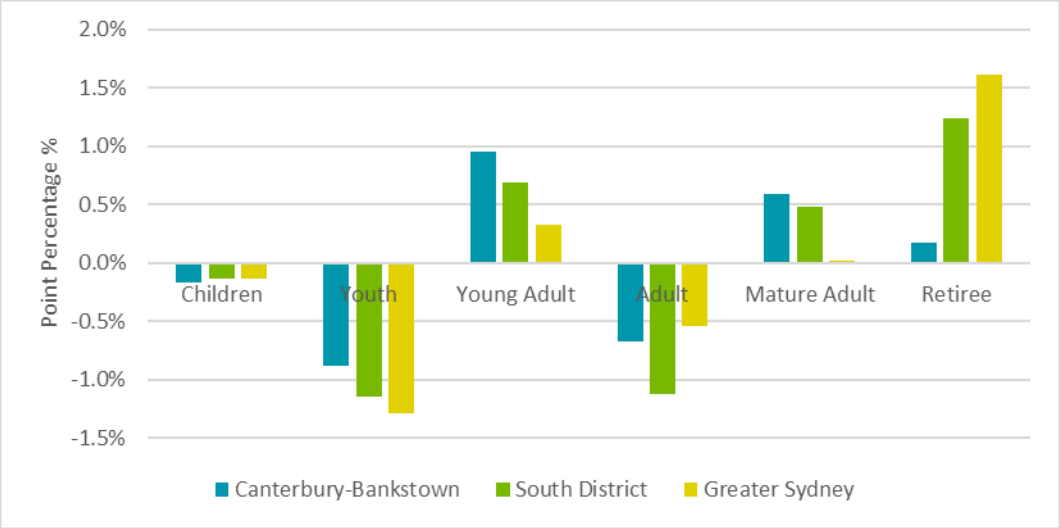
FIGURE 16: OVERALL POPULATION AGE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Although the number of people in all age groups is increasing, an overall change in the structure is noted. The trends are showing a further increase of *Young Adults* (+0.96%), *Mature Adults* (+0.6%), and *Retirees* (+0.18%). They are also showing a drop of *Youth* (-0.9%), *Adults* (-0.7%) and *Children* (-0.2%). These trends are similar across GS but more/less pronounced for certain groups in Canterbury-Bankstown.

FIGURE 17: CHANGE IN POPULATION AGE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Future Projections

Canterbury-Bankstown is projected for continued strong growth across all age categories, especially pronounced for *Retirees, Mature Adults* and *Youth* when observing both growth totals and growth percentages (%).

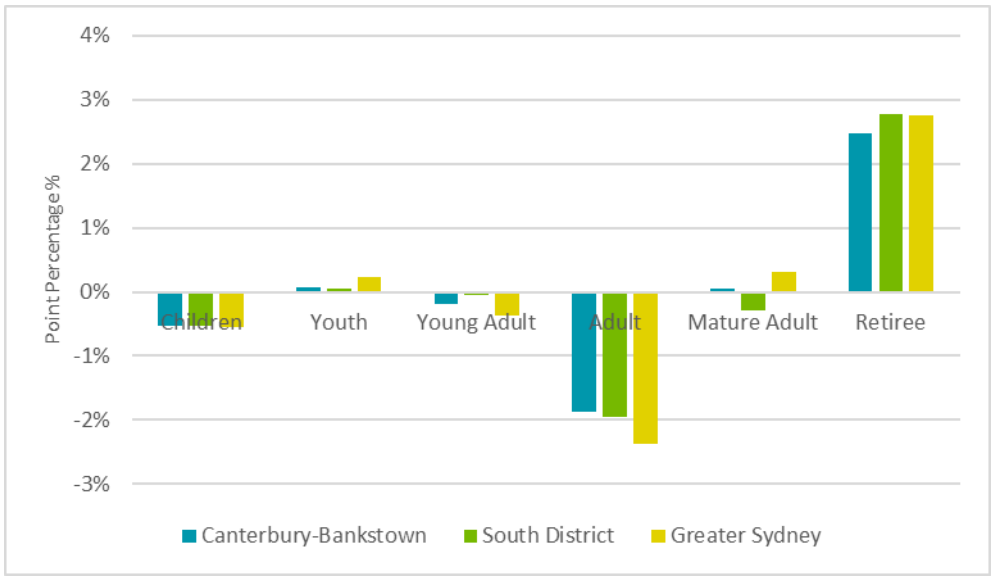
TABLE 7: FORECASTED AGE PROFILE TOTALS AND GROWTH RATES- CANTERBURY-BANKSTOWN (2021-2026)

Year	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Growth 31-36	2,316	6,404	6,052	4,589	10,353	9,646
2036	36,498	98,532	65,422	99,239	116,487	83,712
Growth 26-31	1,876	7,803	4,700	4,106	9,424	9,584
2031	34,182	92,128	59,370	94,650	106,134	74,066
Growth 21-26	1,963	8,303	3,323	6,449	6,751	9,226
2026	32,306	84,325	54,670	90,544	96,710	64,482
2021	30,343	76,022	51,347	84,095	89,959	55,256
Growth (Total)	*6,155*	***22,510***	*14,075*	*15,144*	***26,528***	***28,457***
Growth (CAGR %)	*6.35%*	*9.03%*	*8.41%*	*5.67%*	*9.00%*	***14.85%***

Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

The future projections are showing different structural growth trends, with only *Children* and *Adults* showing similar trends. There is a significantly higher increase in the proportion of *Retirees* (+2.5%) compared to the historical data (0.2%). Furthermore, the future projections also show a declining proportion of *Young Adults* (-0.2%) compared to the opposite historical trend of +1%. The other groups are also showing opposite trends - *Youth* forecasted to achieve a slight growth (+0.07%). These local trends are similar when compared to GS and the District.

FIGURE 18: FORECASTED CHANGE IN POPULATION AGE STRUCTURE (2021-2036)



Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

4.3 Ancestry and Languages

Key Points

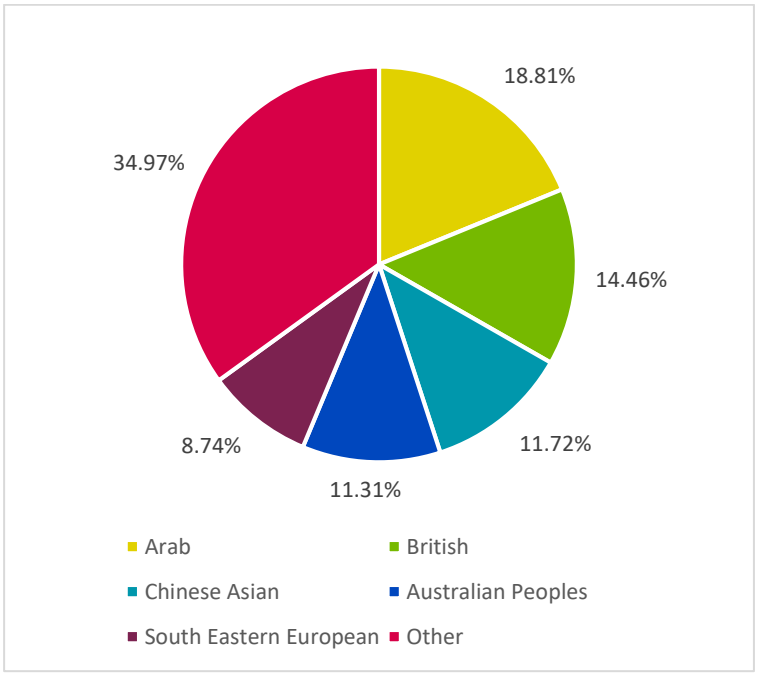
- Large number of people declaring as of *Arab* and *British* ancestry (higher rates than District and GS averages for *Arab*, but lower for *British*)
- Significantly lower proportion of people speaking *English* at home (36.3%), compared to District (53.6%) and GS (60%) averages
- Growth in proportion of people declaring as *Southern Asian, Mainland South-East Asian,* and *Chinese Asian* (from +1.5 to +4.2%) ancestry and decline in *Australian* ancestry (-4%)
- Increase in proportion of *Indo-Aryan, Chinese* and *Mon-Khmer* speaking households, with decline in *English* speaking households

LGA trends and Comparison

Ancestry

The majority of people in Canterbury-Bankstown have declared to be of *Arab* (18.8%) and *British* (14.5%) ancestry. Although *British* ancestry represents a prevalent group in the LGA, it is more prevalent at the District (24.8%) and GS (28.5%) level. On the other side, *Arab* ancestry is significantly higher in Canterbury-Bankstown compared to both areas (District 10.5% and GS 5%). Canterbury-Bankstown also has a distinguished proportions of people of *Chinese* (11.7%), *Australian* (11.3%) and *South Eastern European* (8.7%) decent.

FIGURE 19: ANCESTRY STRUCTURE IN CANTERBURY-BANKSTOWN (2016)



Source: ABS Census 2016 (TableBuilder Pro)

The overall structural changes, in all three comparative areas, are showing an increase of people of *Southern Asian* ancestry (from +3% to +4.2%), as well as a significant decrease of people declaring to be of *Australian* decent (from -3.9% to -6.3%) in the 2006-2016 period. The District and GS are showing stronger growth trends in *Chinese*, while Canterbury-Bankstown of people of *Arab* and *Mainland South-East Asian* descent.

TABLE 8: CHANGE IN CANTERBURY-BANKSTOWN'S ANCESTRY STRUCTURE (2006-2016)

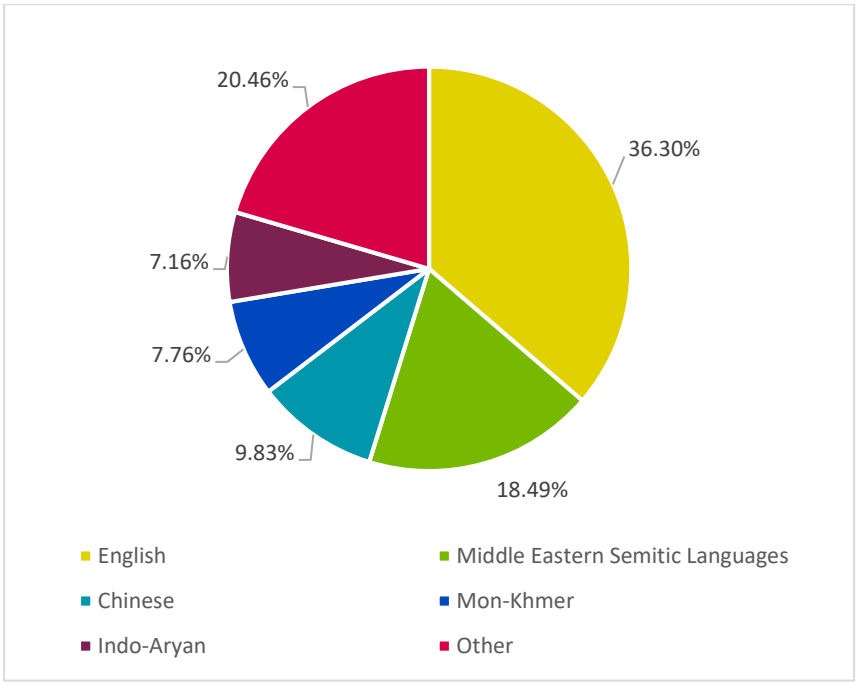
Rank	Ancestry	Change (PP%)
1	Southern Asian	4.21%
2	Mainland South-East Asian	1.75%
3	Chinese Asian	1.63%
…	…	…
35	South Eastern European	-0.62%
36	British	-1.67%
37	Australian Peoples	-3.96%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Language Spoken at Home

Although most people speak *English* at home both in Canterbury-Bankstown (36.3%) and the District/GS (53.6%/60%), there is an overall drop in these numbers. Compared to 2006, there has been a decline in Canterbury-Bankstown (-4.2%) and similarly other two areas respectively (-4.6 and -6.8%).

FIGURE 20: LANGUAGE SPOKEN AT HOME STRUCTURE IN CANTERBURY-BANKSTOWN (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Other prevalent language groups at the District and GS areas include *Greek* and *Mon-Khmer* (although at a much lower levels than English), with *Middle Eastern Semitic Languages* and *Chinese* being more representative in Canterbury-Bankstown. Growth tendencies are present in *Indo-Aryan, Chinese* and *Mon-Khmer* languages.

TABLE 9: CHANGE IN LANGUAGE SPOKEN AT HOME STRUCTURE IN CANTERBURY-BANKSTOWN (2006-2016)

Rank	Language	Change (PP%)
1	Indo-Aryan	4.06%
2	Chinese	1.24%
3	Mon-Khmer	0.85%
…	…	…
58	Italian	-0.83%
59	Greek	-1.45%
60	English	-4.23%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

4.4 Migration and Resident Structure

Key Points

- Most people migrating to Canterbury-Bankstown are coming from *Overseas* and other areas of Australia (*Inner West, Georges River, Cumberland, Rockdale*)
- Most people moving out of Canterbury-Bankstown are migrating to other parts of Sydney (*Liverpool, Georges River, Campbelltown, Cumberland, Sutherland Shire*)
- 28% of the current population has migrated to the LGA in the past 5 years

LGA trends and Comparison

Canterbury-Bankstown's population, while mostly made up of 'Locals' who have resided in the LGA for 5 years or more, is also composed of a significant influx of *Overseas* migrants (26,148) and higher shares of *Internal* migration (37,134) (occurred in past 5 years). *Overseas* migration has grown noticeably in the past 5 years (+15.9%).

TABLE 10:MIGRATION AND RESIDENT STRUCTURE TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2011-2016)

Year	Internal	Overseas	Local	Other
2016	37,134	26,148	235,588	47,371
2011	31,789	18,949	223,516	45,407
Growth (Total)	*5,345*	*7,199*	***12,072***	*1,964*
Growth (CAGR %)	*7.76%*	***15.96%***	*2.63%*	*2.12%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

The largest proportion of the *Internal* migration is coming from surrounding LGAs: *Inner West* (14.9%), *Georges River* (12.2%) and other areas in close proximity. People moving out of the LGA are migrating to *Liverpool, Georges River, Campbelltown, Cumberland* and the *Sutherland Shire*. Furthermore, 87% of Canterbury-Bankstown's population has resided in the LGA for 5 years or more.

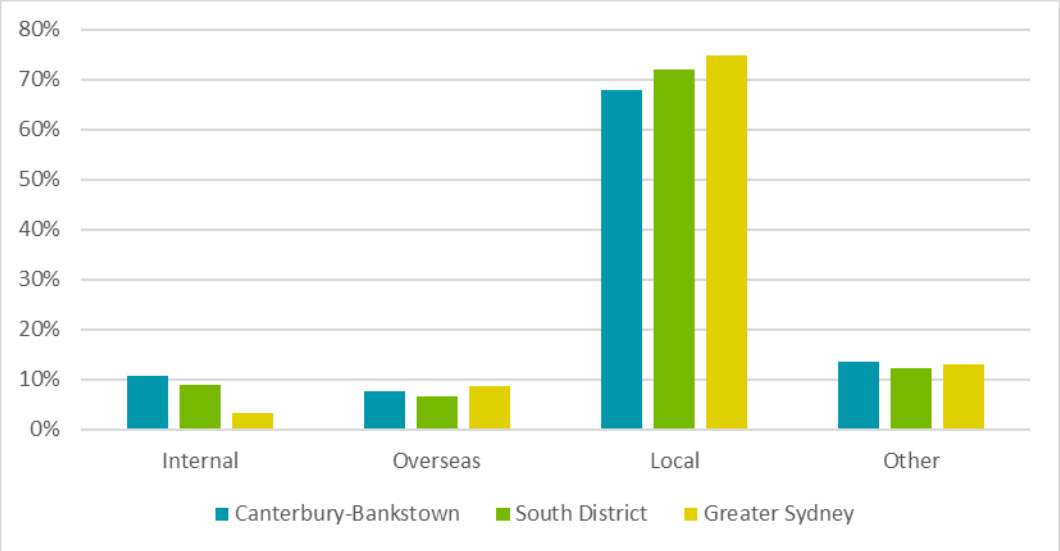
TABLE 11:SOURCE OF INTERNAL MIGRATION (FROM WITHIN AUSTRALIA) TO CANTERBURY-BANKSTOWN–PAST 5 YEARS (2016)

Geography	2016	%
Inner West	5,514	14.9%
Georges River	4,545	12.2%
Cumberland	3,343	9%
Rockdale	2,526	6.8%
Liverpool	1,740	4.7%
City of Sydney	1,702	4.6%
Fairfield	1,610	4.3%
Strathfield	1,272	3.4%
Sutherland Shire	1,263	3.4%
Total	37,134	*100%*

Source: ABS Census 2016 (TableBuilder Pro)

The *Internal* migration rates (10%) are significantly higher compared to the Greater Sydney (1.8%), but similar to District (7.5%), confirming that the area is still going through a lot of dynamic change and growth in line with Greater Sydney trends.

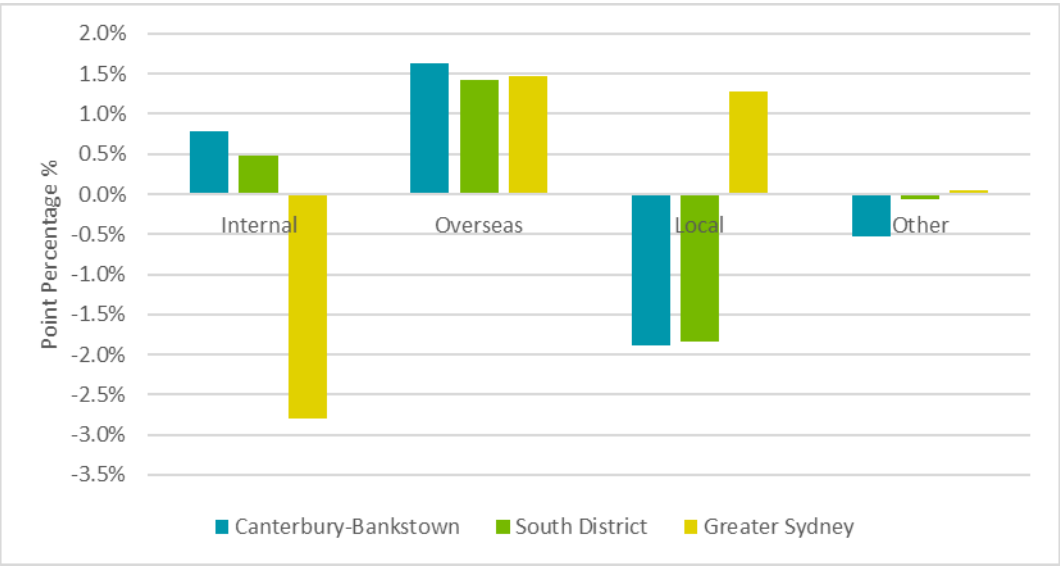
FIGURE 21: MIGRATION/RESIDENT STRUCTURE (2016)[5]



Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing a further increase of *Overseas* migration in the overall population structure of Canterbury-Bankstown (+1.62%) between 2011 and 2016. These rates are slightly higher compared to the GS level (+1.47%) and District level (+1.43%), further proving Canterbury-Bankstown to be a destination for migrants.

FIGURE 22: CHANGE IN MIGRATION/RESIDENT STRUCTURE (2011-2016)



Source: ABS Census 2011 and 2016 (TableBuilder Pro)

[5] Local indicating residents that have lived in Canterbury-Bankstown for 5 years or more. Other denotes unknown origin

4.5 Dwelling Rates and Structure

Key Points

- Additional 10,600 *dwellings* (between 2006-2016)
- Higher dwelling growth rate (+4.7% each 5 years between 2006-2016) compared to District average (+3.8%), but lower than GS (+6.5%)
- Largest proportion of *Separate Houses* (56.3%) in overall composition with increase of *Semi-Detached* (+4%)

Local Context

Number of Dwellings

Most of the statistics follow the same pattern as in the Table 1 (population). *Canterbury (South) - Campsie* and *Bankstown* have the highest number of dwellings, followed by *Panania - Milperra - Picnic Point* and *Punchbowl.*

A couple of suburbs have experienced significant growth between the Census periods, in particular *Canterbury (South) - Campsie* and *Punchbowl* (between 1,000 and 1,200). *Yagoona - Birrong* has also a high relative growth rate (+12%).

Another interesting distinction is the difference between certain areas in terms of the number of *People per Dwelling* (most liked corelated to different *Household Composition* and *Dwelling Structure* and lifestyle). Higher rates are predominantly in suburbs with higher rates of *Couples with Children* and *Group Households* (*Greenacre - Mount Lewis* and *Condell Park).*

TABLE 12: SUBURB DWELLING TOTALS AND GROWTH RATES (2011-2016)

Geography	2011	2016	Growth	Growth (%)	People per Dwelling[6]
Canterbury (South) - Campsie	9,992	11,237	1,245	12%	2.90
Bankstown	9,214	9,656	442	5%	3.13
Panania - Milperra - Picnic Point	8,897	9,296	399	4%	2.93
Punchbowl	8,039	9,096	1,057	13%	3.06
Kingsgrove (North) - Earlwood	8,309	8,757	448	5%	2.91
Greenacre - Mount Lewis	7,225	7,478	253	4%	3.46
Yagoona - Birrong	6,550	7,333	783	12%	3.26
Bass Hill - Georges Hall	6,968	7,286	318	5%	3.20
Belmore - Belfield	6,439	6,640	201	3%	2.85
Padstow	5,925	6,201	276	5%	2.84
Canterbury (North) - Ashbury	5,665	6,165	500	9%	2.61
Roselands	5,872	6,136	264	4%	2.94
Chester Hill - Sefton	5,688	6,003	315	6%	3.29
Revesby	5,473	5,868	395	7%	2.96
Lakemba	5,341	5,517	176	3%	3.28
Condell Park	3,311	3,548	237	7%	3.43
Wiley Park	3,433	3,485	52	2%	3.08
Bankstown CBD	1,322	1,455	133	10%	2.89
Chullora	-	-	-	-	-

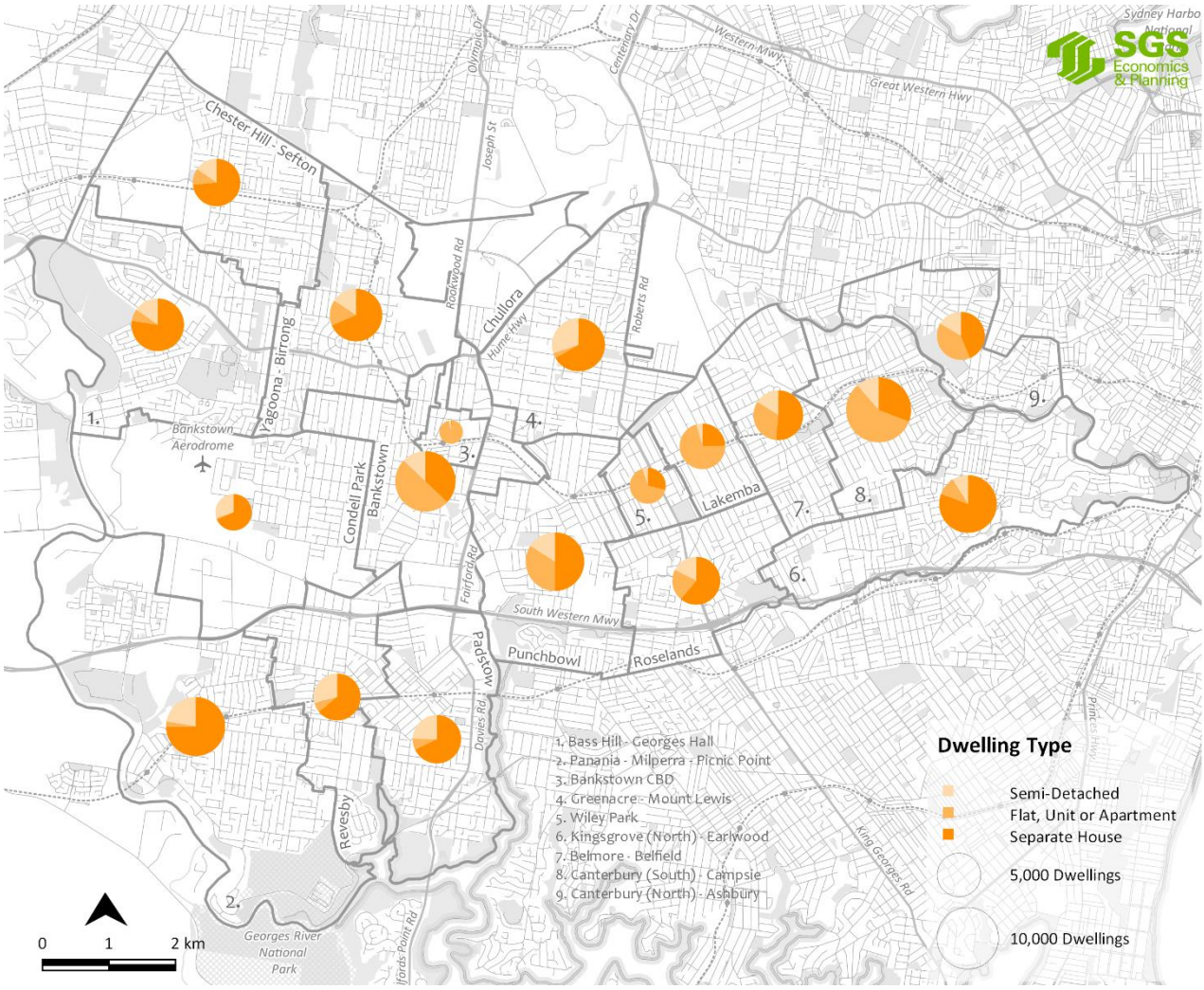
Source: ABS Census 2011 and 2016 (TableBuilder Pro)

[6] Average derived from dividing population with occupied dwellings

Dwelling Structure

The dwelling structure is relatively diverse at suburb level, dominated by *Flat, Units and Apartments* in the inner suburbs (surrounding CBD and along train line - *Bankstown CBD, Lakemba, Wiley Park*) and larger proportions of *Separate Houses* and *Semi-Detached* "outer-bordering" areas (*Padstow, Kingsgrove (North) - Earlwood, Panania - Milperra*).

FIGURE 23: SUBURB DWELLING STRUCTURE TOTALS – MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 13: SUBURB DWELLING STRUCTURE TOTALS (2016)

Geography	Separate House	Semi-Detached	Flat, Unit or Apartment	Other
Canterbury (South) - Campsie	3,427	1,263	6,419	-
Bankstown	3,577	1,244	4,852	-
Panania - Milperra - Picnic Point	6,952	2,062	277	-
Punchbowl	4,513	1,434	3,082	-
Kingsgrove (North) - Earlwood	7,021	770	912	-
Greenacre - Mount Lewis	5,009	2,266	237	-
Yagoona - Birrong	5,001	1,143	1,154	-
Bass Hill - Georges Hall	5,577	1,094	534	4
Belmore - Belfield	3,414	1,059	2,160	-
Padstow	4,186	1,524	452	-
Canterbury (North) - Ashbury	2,695	1,010	2,431	-
Roselands	3,730	1,068	1,312	-
Chester Hill - Sefton	4,411	925	672	-
Revesby	3,724	1,692	385	-
Lakemba	1,348	241	3,912	-
Condell Park	2,418	1,066	46	-
Wiley Park	999	178	2,317	-
Bankstown CBD	12	50	1,363	-
Chullora	-	-	-	-

Source: ABS Census 2016 (TableBuilder Pro)

LGA trends and Comparison

Number of Dwellings and Occupancy

Canterbury-Bankstown has experienced similar growth rates in the number of *dwellings* compared to the District, but lower than GS. Overall, there is an additional 10,602 *dwellings*. Furthermore, it also has a total *occupancy rates* of 93.5%, similar to District (93.6%) and GS (93%).

TABLE 14: DWELLING TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (%)
Greater Sydney	1,509,459	1,581,024	1,711,288	201,829	6.48%
South District	241,173	247,781	259,739	18,566	3.78%
Canterbury-Bankstown	110,717	113,874	121,319	10,602	4.68%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Dwelling Structure

Canterbury-Bankstown has experienced a strong growth total in *Semi-Detached* and *Flats, Units and Apartments,* with a noticeably strong growth percentage of +20.5% for *Semi-Detached*. Growth totals for *Separate Houses* are comparatively low, with only +1,100 separate homes being built in the period 2006-2016.

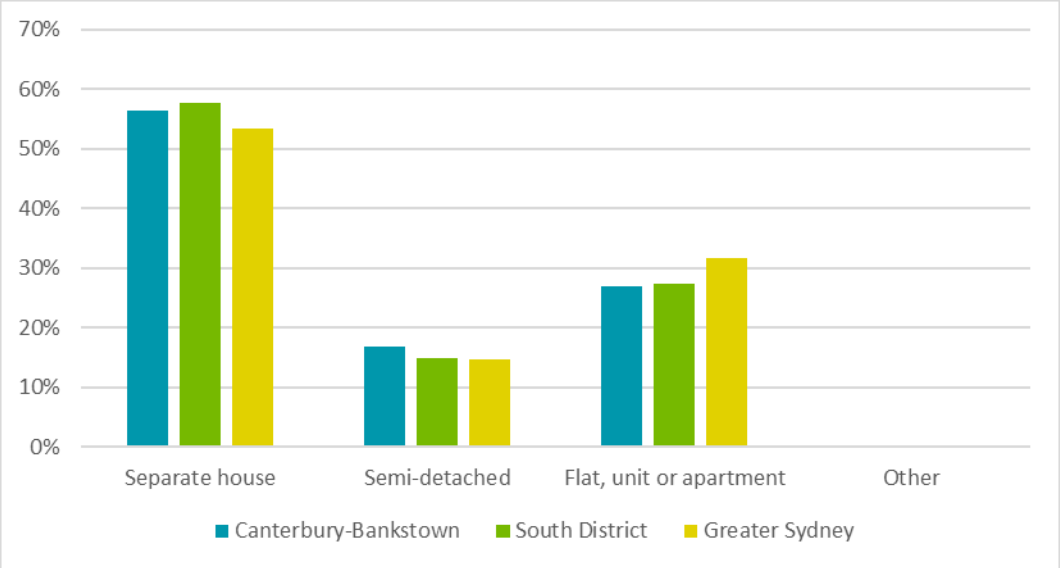
TABLE 15: DWELLING STRUCTURE TOTALS AND GROWTH RATES (2006-2016)

Year	Separate House	Semi-Detached	Flat, Unit or Apartment	Other
2016	68,069	20,222	32,550	21
2011	69,030	15,557	28,935	87
2006	69,167	13,926	27,403	129
Growth (Total)	*-1,098*	***6,296***	***5,147***	*- 108*
Growth (CAGR %)	*-0.80%*	***20.50%***	*8.99%*	*-59.65%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

The proportion of *Separate Houses* (56.3%) is slightly lower than the South District, but higher than the Greater Sydney average (53.4%). Despite a growing profile of flats and apartments (27% of total dwellings), it still remains lower than the District (27.3%) and GS (31.7%) averages. *Semi-detached,* is the third-most prevalent dwelling type in the LGA (16.7%), and higher rates than the District (15%) and GS (14.6%) averages.

FIGURE 24: DWELLING TYPE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Growth tendencies are showing a proportional increase of *Semi-Detached* dwellings across all compared areas (+1.8% to +2%). Furthermore, it also shows positive trends for *Flat, Units or Apartments* at the local range, despite having lower rates than the District (-0.3%) and GS levels (-4.8%). A strong trend of decline in *Separate House* is present at the local, district and metro-scale (from -5% to 6%).

FIGURE 25: CHANGE IN DWELLING TYPE STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Future Projections

Number of Dwellings and Occupancy

Canterbury-Bankstown is forecasted to grow by an additional 52,372 dwellings between 2021 and 2036 and at higher rates (CAGR of 11.24%) than the District (8%) and GS (9.8%). The *occupancy* rates will remain high (93.6% at 2036).

TABLE 16: FORECASTED DWELLING TOTALS AND GROWTH RATES (2021-2026)

Geography	2021	2026	Growth 21-26	2031	Growth 26-31	2036	Growth 31-36	Total Growth	CAGR (%)
Greater Sydney	1,952,909	2,151,081	198,172	2,356,444	205,363	2,583,639	227,195	630,730	9.78%
South District	290,464	313,638	23,174	338,657	25,019	365,599	26,942	75,135	7.97%
Canterbury-Bankstown	139,049	155,283	16,234	172,699	17,416	191,422	18,723	52,372	11.24%

Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

4.6 Family Household Composition, Income and Number of Motor Vehicles

Key Points

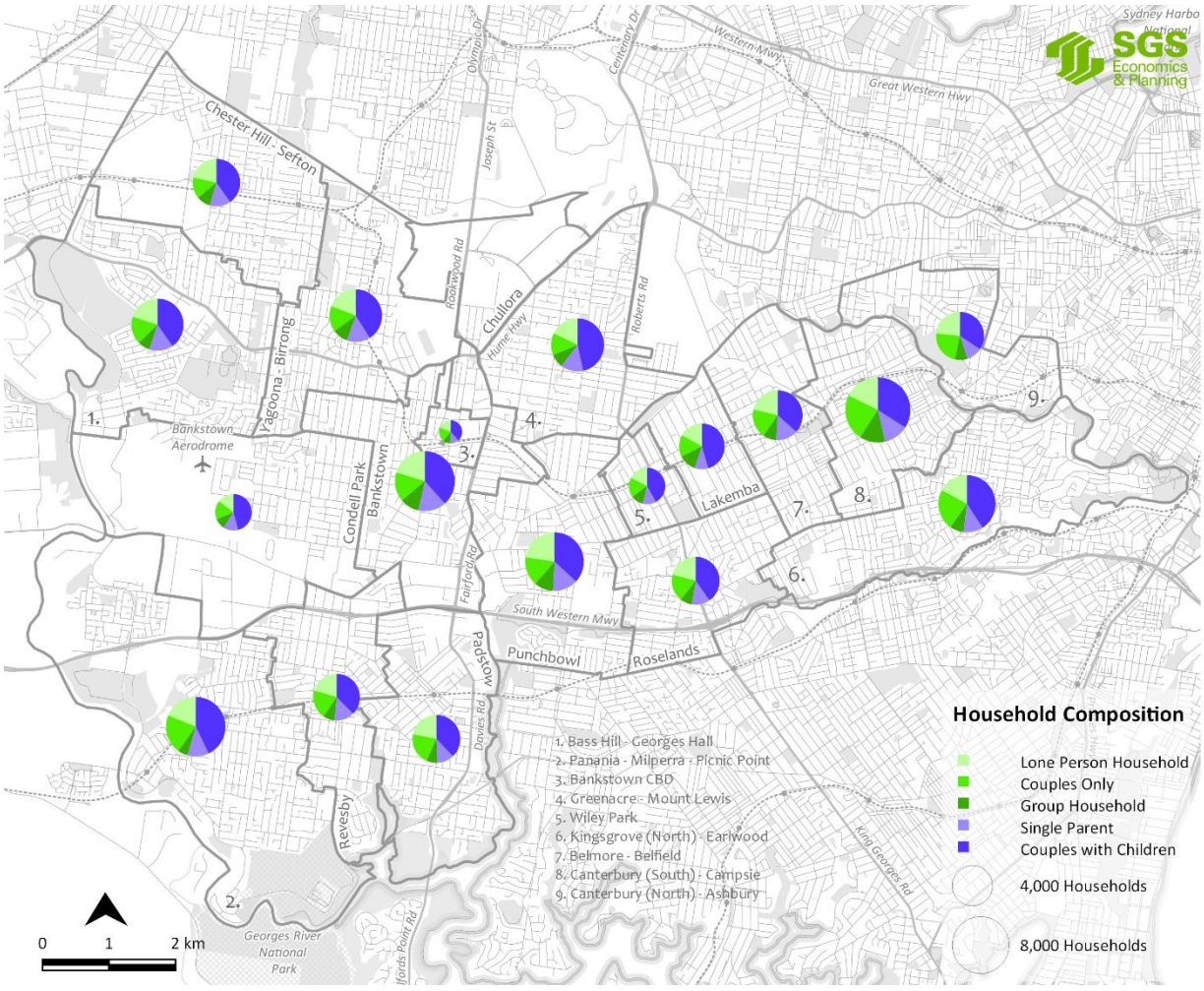
- Largest proportion of *Couples with Children* with continued growth trends
- Smaller ratio of *Lone Person Households* compared to District and GS
- Lower incomes compared to District and GS
- Greater ratio of households with large number of motor vehicles than District and GS
- Trends showing drop in households with *No* or *One Vehicle*

Local Context

Family Household Composition

Similarly to the *Age Profile* breakdown, there is a clear distinction between the more inner suburbs (surrounding CBD and along train line) that have a higher proportion of *Group Households* and *Youth* (*Bankstown, Canterbury (South) - Campsie, Lakemba, Wiley Park*) or *Couples with Children* (*Greencare - Mount Lewis* and *Condell Park*) compared to "outer-bordering" more matured areas (*Padstow, Canterbury (North) – Ashbury, Revesby*) with larger proportions of *Couples Only* and *Lone Households*.

FIGURE 26: SUBURB FAMILY HOUSEHOLD COMPOSITION TOTALS – MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 17: SUBURB FAMILY HOUSEHOLD COMPOSITION TOTALS (2016)

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Canterbury (South) - Campsie	2,297	3,376	1,227	1,753	1,260
Panania - Milperra - Picnic Point	1,788	3,599	982	1,585	458
Bankstown	1,323	3,202	1,265	1,694	859
Punchbowl	1,278	2,935	1,117	1,805	837
Kingsgrove (North) - Earlwood	1,786	3,163	867	1,336	598
Greenacre - Mount Lewis	905	3,110	923	1,190	554
Bass Hill - Georges Hall	1,126	2,638	972	1,321	493
Yagoona - Birrong	1,031	2,656	933	1,237	607
Belmore - Belfield	1,114	2,138	848	1,248	507
Padstow	1,188	2,108	651	1,224	403
Roselands	1,009	2,189	680	1,141	432
Chester Hill - Sefton	777	2,173	781	1,164	512
Canterbury (North) - Ashbury	1,245	1,842	574	1,253	458
Revesby	1,055	1,965	738	1,071	417
Lakemba	758	2,213	475	821	600
Wiley Park	543	1,322	371	558	353
Condell Park	523	1,435	414	460	297
Bankstown CBD	245	465	150	230	123
Chullora	-	-	-	-	-

Source: ABS Census 2016 (TableBuilder Pro)

LGA trends and Comparison

Family Household Composition

Canterbury-Bankstown is prevailed by a large number of *Couples with Children* with sustained high growth totals in this category (+2.6%) as well as in *Group household* (+10.1%).

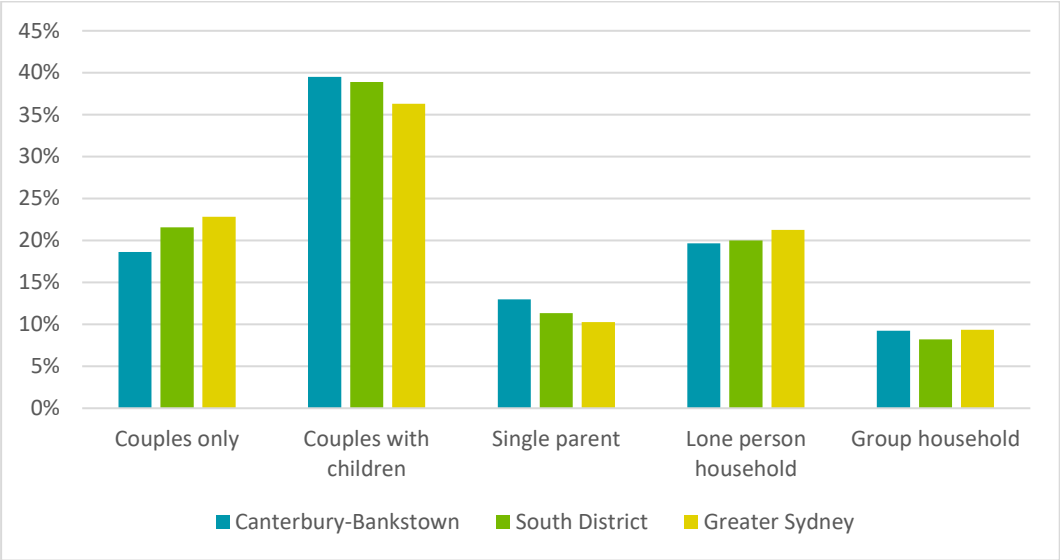
TABLE 18: FAMILY HOUSEHOLD COMPOSITION TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Couples only	Couples with children	Single parent	Lone person household	Group household
2016	20,073	42,590	13,985	21,173	9,942
2011	19,934	40,403	13,518	21,201	8,115
Growth (Total)	*139*	***2,187***	*467*	*-28*	***1,827***
Growth (%)	*0.35%*	***2.64%***	*1.70%*	*-0.07%*	***10.12%***

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Canterbury-Bankstown has a slightly higher proportion of *Couples with Children* (39.5%) compared to the District (38.9%) and GS (36.3%). However, it has a smaller ratio of *Lone Person Households* and *Couples Only.*

FIGURE 27: HOUSEHOLD COMPOSITION STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Growth tendencies are showing an increase of *Group Households* (+1.4%) and continuous growth trends of *Couples with Children* (about +0.4%) in Canterbury-Bankstown. *Lone person households* and *Couples Only* are declining as a proportion of the households, with *Couples Only* declining at faster rates (-0.7%) compared to District (-0.5%) and GS (-0.2%) averages.

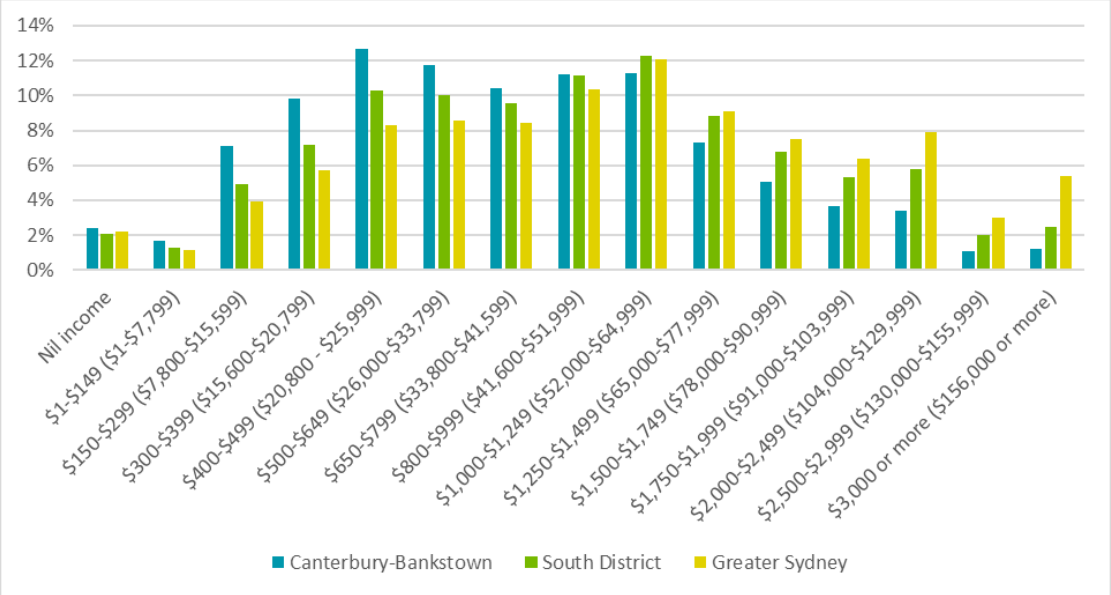
FIGURE 28: CHANGE IN HOUSEHOLD COMPOSITION STRUCTURE (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

Household Income

Canterbury-Bankstown has a higher ratio of households with earnings of *$800-$999 and less* compared to both the GS and District area, with a smaller proportion of households with higher weekly earnings of *$1,000-$1,249+* (more prevalent at District and GS averages).

FIGURE 29: EQUIVALISED HOUSEHOLD INCOME STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Number of Motor Vehicles

Most households in Canterbury-Bankstown have *One* and *Two Motor Vehicles*, with strong growth totals in *Two Motor Vehicles* category. However, relative growth rates for *Four or more motor vehicles* and *Three motor vehicles* are significantly higher despite still being comparatively low in totals (31.9% and 19.5% respectively). Households *Not Owning a Motor Vehicle* are declining (-10.15%)

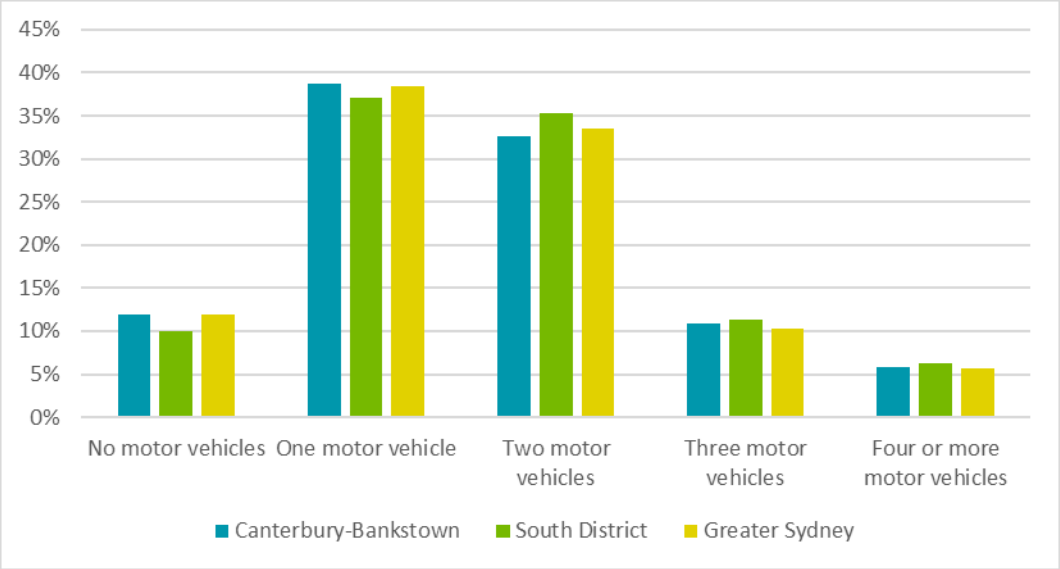
TABLE 19: MOTOR VEHICLE OWNERSHIP TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	No motor vehicles	One motor vehicle	Two motor vehicles	Three motor vehicles	Four or more motor vehicles
2016	12,363	40,334	33,949	11,387	6,062
2011	13,603	40,142	31,938	9,438	4,377
2006	15,313	39,464	28,555	7,970	3,484
Growth (Total)	*-1,240*	*192*	***2,011***	*1,949*	*1,685*
Growth (CAGR %)	***-10.15%***	*1.10%*	*9.04%*	***19.53%***	***31.91%***

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Canterbury-Bankstown has a large proportion of households with *One* to *Two motor vehicles* (a combined total of 71.4%), similar to the District and GS (both approximately 72%). The proportion of households owning *Three motor vehicles* in Canterbury-Bankstown (11%) is slightly higher than the GS average (10.3%).

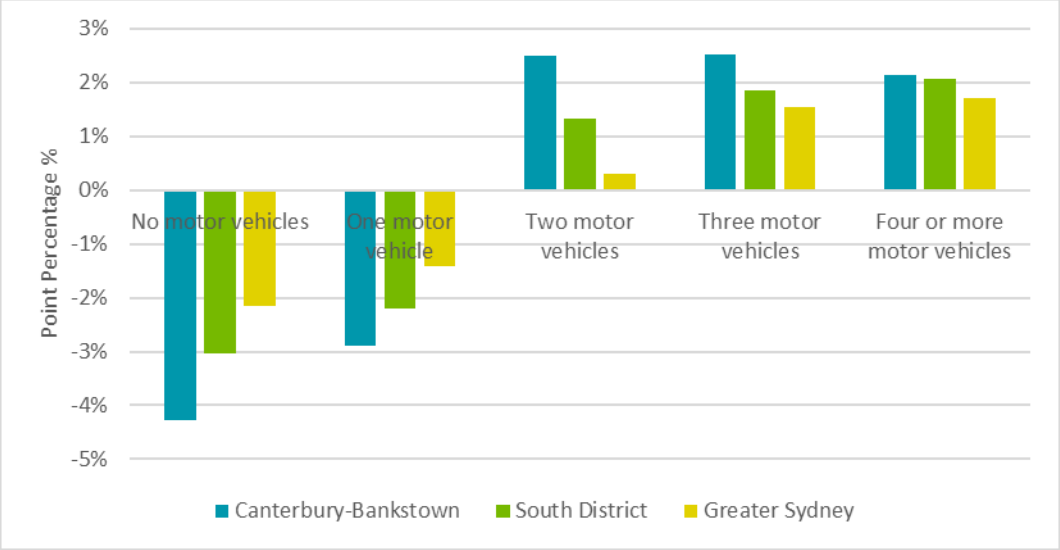
FIGURE 30: MOTOR VEHICLE OWNERSHIP STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Growth tendencies are showing a further increase of motor vehicle ownership in Canterbury-Bankstown, particularly profound when observing ownership levels for *Two+ Motor Vehicles* (ranging from +2.1 to +2.6% in growth), with the Canterbury-Bankstown average being higher than the District and GS level overall.

FIGURE 31: CHANGE IN MOTOR VEHICLE OWNERSHIP STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

4.7 Tenure Type, Mortgage Repayments and Rent

Key Points

- Highest proportion of households that are *Rented* (36%)
- Most households have monthly repayment rates between *$2,600 and $3,499* and *$2,000 to $2,199*
- Increase in proportion of *Rent* based tenures
- More *rents* in the mid-range categories, compared to District and GS

LGA trends and Comparison

Tenure Type

The most prominent tenure type is *Rented* (36.7%), with *Owned Outright* (31.1%) and *Owned with a Mortgage* (30.4%) at similar proportions. There are more *Rented* households in Canterbury-Bankstown compared to the District and GS.

TABLE 20: TENURE TYPE TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Owned outright	Owned with a mortgage	Being purchased under a rent/buy scheme	Rented	Being occupied rent-free	Being occupied under a life tenure scheme	Other tenure type
2016	32,638	31,908	121	38,521	985	295	446
2011	33,712	31,827	380	32,784	801	231	483
2006	34,717	27,825	345	31,528	755	208	360
Growth (Total)	*-2,079*	***4,083***	*-224*	***6,993***	*230*	*87*	*86*
Growth (CAGR %)	*-3.04%*	*7.09%*	*-40.78%*	***10.54%***	***14.22%***	*19.09%*	*11.31%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

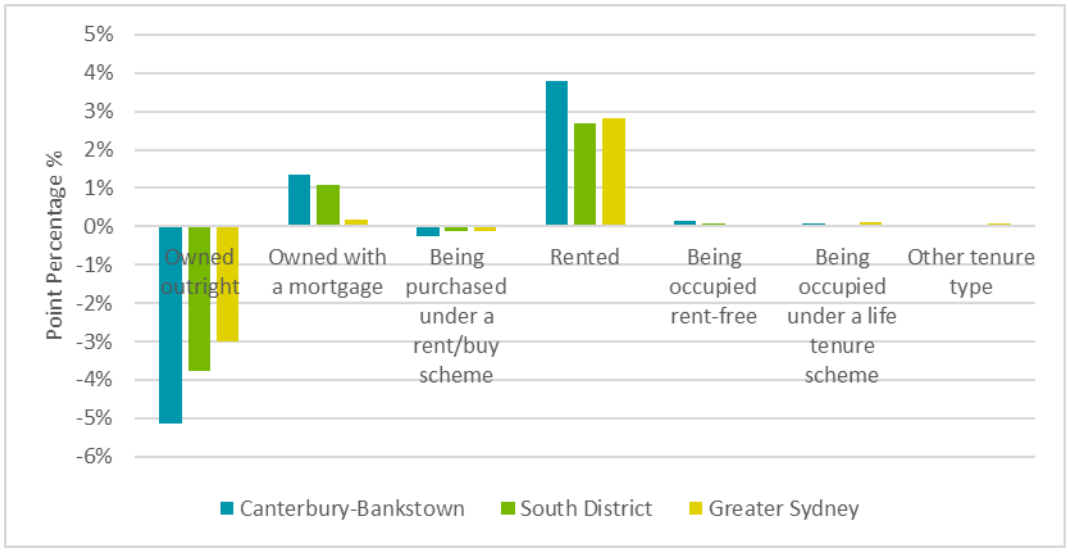
FIGURE 32: TENURE TYPE STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

The proportion of *rented* households is also increasing, with a relatively high growth percentage (+3.8%) along with mortgage based ownership (+1.4%) - both categories at higher levels than at District and GS averages. Although having a large proportion of *Owned Outright*

households, it is declining as a proportion of total households (-5.2%) and at higher rates than the District (-3.8%) and GS (-3%) averages.

FIGURE 33: CHANGE IN TENURE TYPE STRUCTURE (2006-2016)

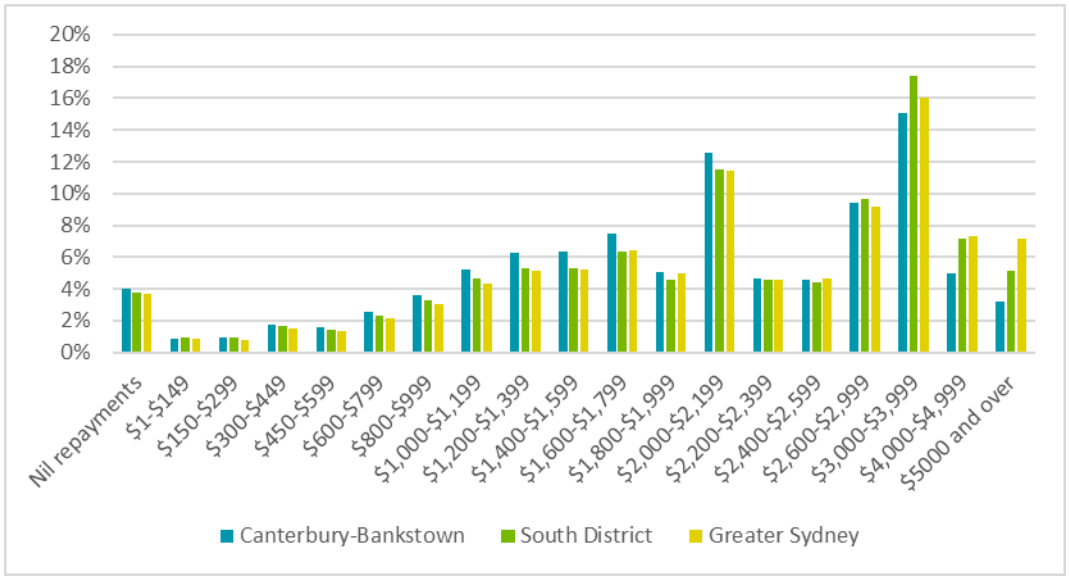


Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Mortgage Repayments

Canterbury-Bankstown has a lower rate of monthly mortgage repayments compared to the District, with a larger proportion of repayments below *$2,199*

FIGURE 34: MORTGAGE REPAYMENT STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing an increase in specific categories, namely *$2,000-$2,199+*, *3,000 or more* and *Nil repayments*, suggesting a slightly more targeted increase (i.e. specific ranges) corelated to lending schemes.

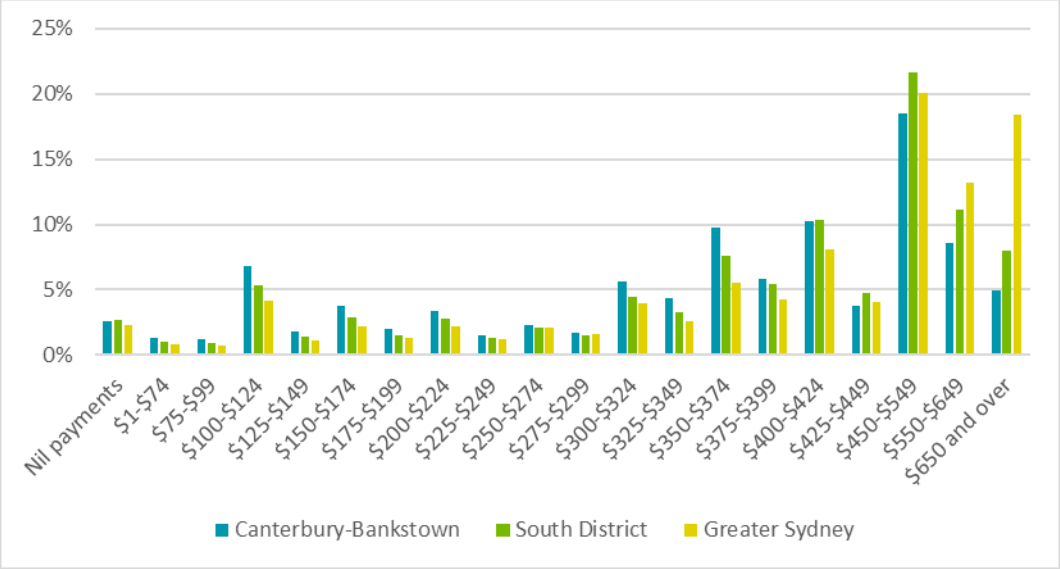
FIGURE 35: CHANGE IN MORTGAGE REPAYMENT STRUCTURE (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

Rents

Canterbury-Bankstown's most prominent (weekly) *Rent* is in the range of *$450-$549*, representing 18.5% of total rents, slightly below the District (21.6%) and GS (20%) quotas.

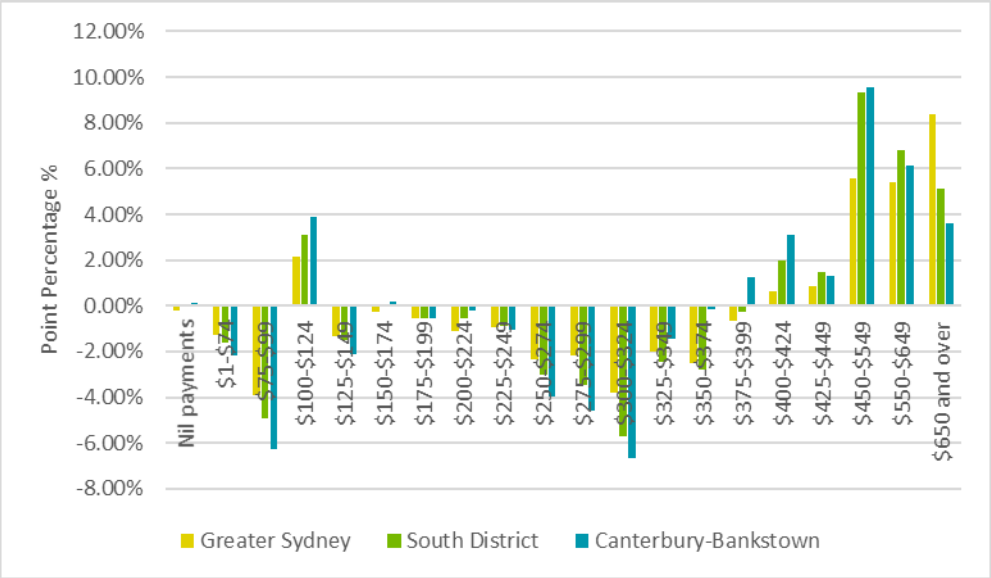
FIGURE 36: RENT REPAYMENT STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

There is a further increase in the proportion of high-end rents *($450+)* across all three areas, however this trend is less pronounced in Canterbury-Bankstown.

FIGURE 37: CHANGE IN RENT REPAYMENT STRUCTURE (2011-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

4.8 Future Considerations and Directions for other LSPS Studies

Growth, urban renewal and housing diversity

With continuous growth in the area and announced urban redevelopment in the Sydenham to Bankstown corridor, supported by additional mass transit (metro), there are both further opportunities and potential risks to explore associated with the roll out of this project. The housing, social infrastructure and centres studies might explore:

- Alignment of housing policy targets with observed growth trends
- Different options for mid-residential development - potential for development not only in the centre's core (direct vicinity of stations), but also in the surrounding areas ("2nd ring") to ensure a diversity of housing stock is provided for the community
- Test feasibility and LEP controls (housing capacity)
- The need to provide new retail and employment floorspace to meet the demands of the growing community
- Potential displacement and gentrification related to new development (particular in future high-density residential areas)
- Number of social infrastructure services (schools, medical facilities, open space etc.) needed to meet future demand in the right places

Ageing population, downsizing options and social services

Australia's population is ageing. With more people approaching retirement and younger people moving out of home there might be an opportunity to explore different housing options but also the need to cater social services to meet the future demand:

- Further explore migration trends in more established suburbs (Padstow, Revesby, Earlwood) e.g. Are younger people moving out with family households transitioning to *Lone Person* and *Couples Only*.
- Ensuring that future development provides sufficient diversity to attract potential downsizers from larger single dwellings, through good design, proximity to local services and supporting community infrastructure

- What locations will need more social services for elderly people based on the demographic analysis and is there potential to re-use existing infrastructure?

Traffic congestion and public transport

Trends indicate an increase of car ownership rates, and large number of people using private vehicles in commuting to work. Further directions to explore might be:

- Identify pockets of high car ownership rates and if there is potential for new public transport services
- Explore options on how to leverage increased station capacity by providing adequate supporting services from and to the stations (i.e. active/shared transport options) – "last mile problem"
- Map out *Journey to Work* data and identify employment hot spots that have potential for new or improved public transport routes

Housing affordability

With rising rents, declining home ownership and increasing number of *Group Households* housing affordability is a key issue to explore:

- How can Canterbury-Bankstown address housing affordability via different mechanisms such as: value capture, inclusionary zoning and voluntary agreements (i.e. SEPP 70)?
- Are there housing options (i.e. missing middle) that might make housing more affordable to different types of age profiles and households?
- What are the key worker groups that might benefit from the above?

5. EMPLOYMENT

This chapter analyses a number of employment based measures and indicators, pointing to historical and forecasted trends, insights and future directions for the LSPS studies

5.1 Labour Force Status, Industry of Employment and Occupation (PUR)

Key Points

- Lower number of *Full-Time* employees compared to District and GS
- Large number of people *Not in the Labour Force*
- Highest number of employees in *Population Serving* industries with largest growth in *Health and Education* and negative trends in *Industrial*
- Most residents (outside of Canterbury-Bankstown) work in *Sydney (C)*, *Inner West* and *Parramatta*

LGA trends and Comparison

Labour Force Status (PUR)

Most of Canterbury-Bankstown's residents are either *Not in the Labour Force* or *Employed, working Full-Time*. There was a considerable increase of residents *Not in the Labour Force* (+15,010 people) and *Employed, Working Part-Time* (+13,759 people). The amount of people *Unemployed, Looking for Part-Time Work* increased by over 30% from 2006-2016.

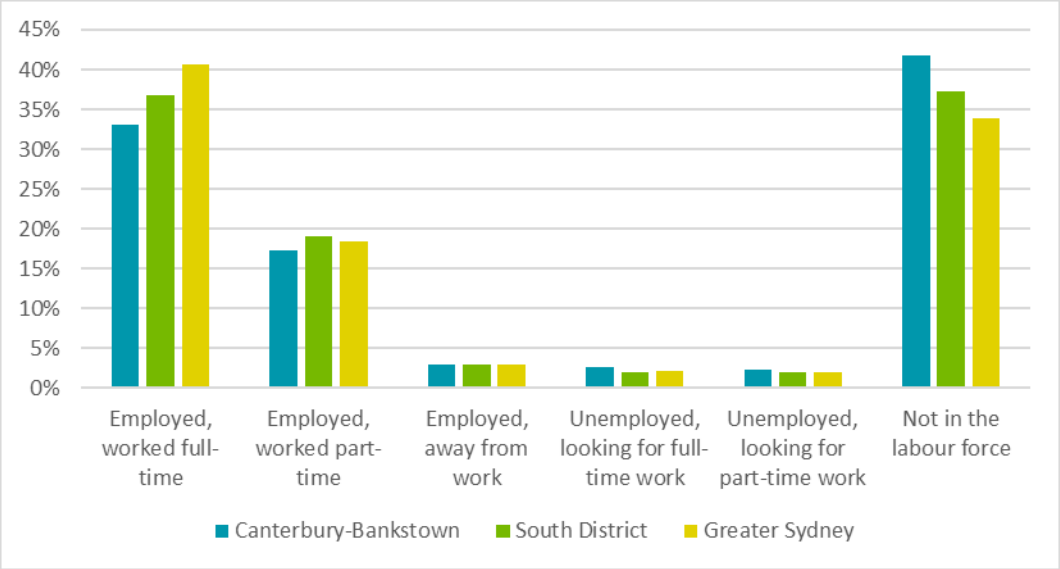
TABLE 21: LABOUR FORCE TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Employed, worked full-time	Employed, worked part-time	Employed, away from work	Unemployed, looking for full-time work	Unemployed, looking for part-time work	Not in the labour force
2016	85,601	44,841	7,755	6,591	5,831	108,214
2011	79,185	36,750	8,604	6,368	4,224	100,607
2006	76,114	31,082	8,762	6,169	3,381	93,204
Growth (Total)	***9,487***	***13,759***	*-1,007*	*422*	*2,450*	***15,010***
Growth (CAGR %)	*6.05%*	***20.11%***	*-5.92%*	*3.36%*	***31.33%***	*7.75%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Canterbury-Bankstown has a relatively lower proportion of *Full-Time* workers (33%) compared to the District (36.8%) and GS (40.7%) with negative historical trends in this category too. The amount of people that are *Not in the Labour Force* (41.8%) is higher than the District (37.3%) and GS averages (33.9%).

FIGURE 38: LABOUR FORCE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Trends have been showing significant growth of *Part-Time* workers (+3%) and a reduction in the proportion of people working full-time and *Not in the Labour Force* (-1%).

FIGURE 39: CHANGE IN LABOUR FORCE STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Industry of Employment (PUR)

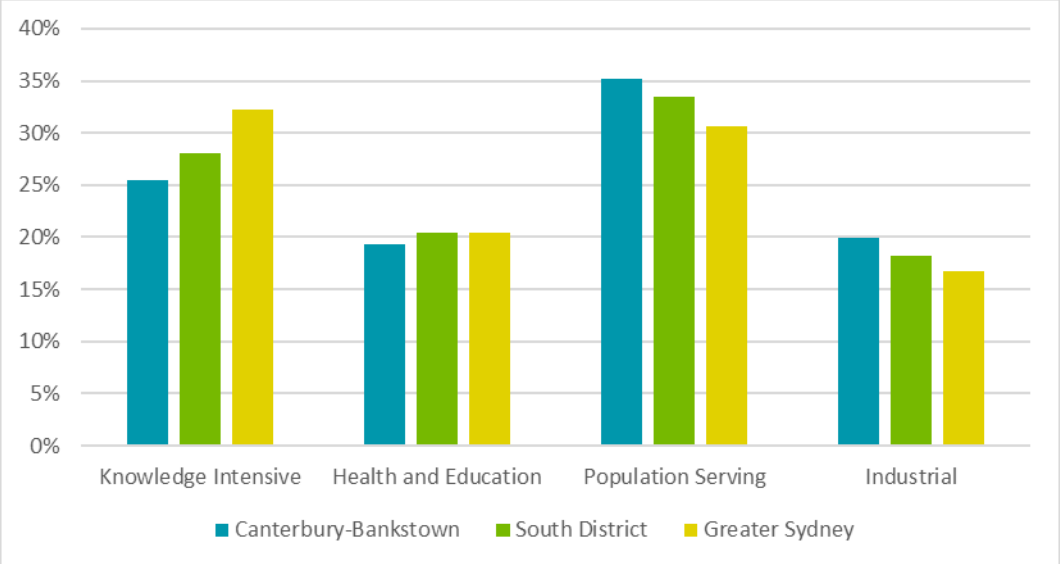
The majority of Canterbury-Bankstown's residents are employed in the *Population Serving* industry (35.2%) with a similar overall industry breakdown as the District and the *Knowledge Intensive* (25.5%) category, which is noticeably lower than the District (28%) and GS (32.2%) averages. However, Canterbury-Bankstown has a greater number of people employed in *Industrial* (20%) compared to District (18.2%) and GS (16.7%) averages.

TABLE 22: INDUSTRY OF EMPLOYMENT (PUR) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Knowledge Intensive	Health and Education	Population Serving	Industrial
2016	32,930	25,004	45,488	25,739
2011	29,324	20,382	39,732	30,739
2006	26,639	16,902	36,806	31,196
Growth (Total)	*6,291*	***8,102***	***8,682***	*-5,457*
Growth (CAGR %)	*11.18%*	***21.63%***	*11.17%*	*-9.17%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

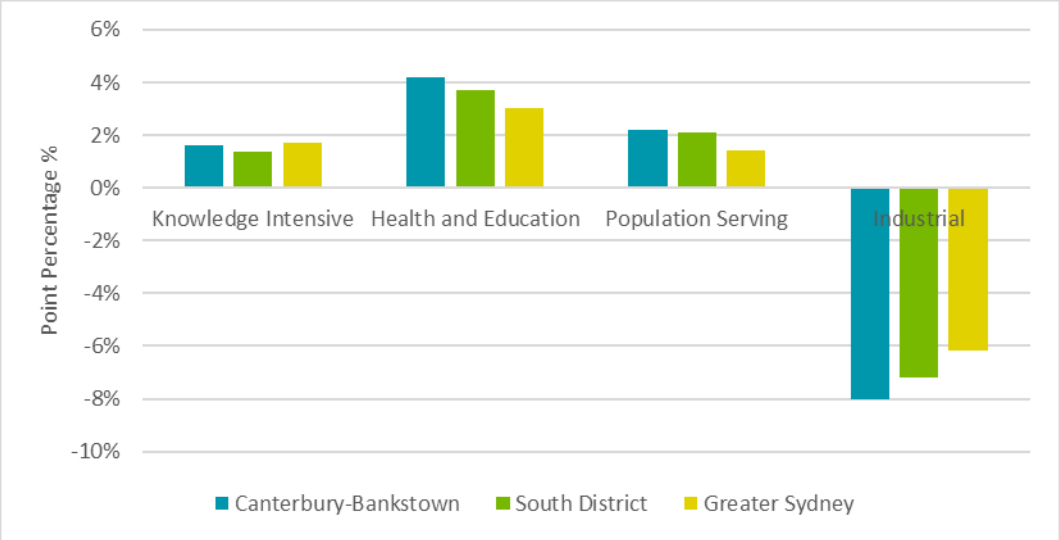
FIGURE 40: INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing further growth in all categories except *Industrial,* with a +4.2% increase in the proportion of *Health and Education* workers, becoming the highest growing industry of employment across all compared areas at local, District and GS level. A noticeable drop in the *Industrial* broad industry category (BIC) is also evident (ranging from -6% to -8%).

FIGURE 41: CHANGE IN INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Occupation (PUR)

The largest number of Canterbury-Bankstown's residents are occupied as *Professionals* and *Clerical and Administrative Workers* with positive growth total trends for *Professionals*.

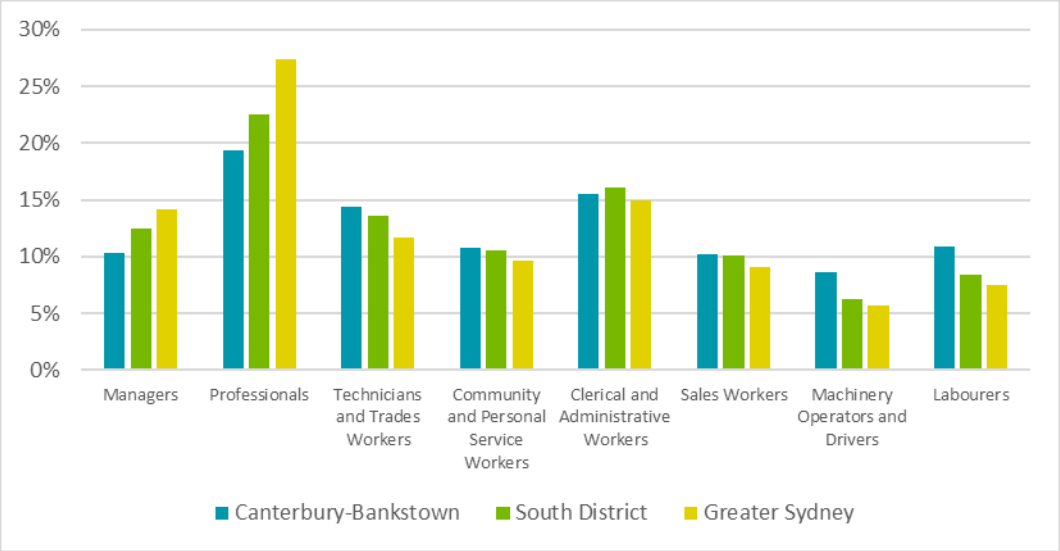
TABLE 23: OCCUPATION (PUR) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
2016	13,897	26,143	19,354	14,511	20,861	13,820	11,653	14,650
2011	12,212	22,471	18,544	11,106	21,049	12,027	10,891	13,054
2006	11,206	18,651	18,325	9,007	20,095	11,536	10,749	13,038
Growth (Total)	*2,691*	***7,492***	*1,029*	***5,504***	*766*	*2,284*	*904*	*1,612*
Growth (CAGR %)	*11.36%*	***18.39%***	*2.77%*	***26.93%***	*1.89%*	*9.45%*	*4.12%*	*6.00%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

The overall Occupation breakdown is mostly similar across all compared areas, with a few distinct differences. There is a prominent larger portion of blue-collar workers (*Technicians and Trades Workers*, *Machinery Operators and Drivers and Labourers*) in the District and Canterbury-Bankstown compared to the GS area, as well as a smaller volume of *Professionals*.

FIGURE 42: OCCUPATION (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

The trends are showing growth trends across the *Professionals* (about 2.8%), *Community and Personal Service Workers* (about 2.8%) and *Managers* (0.4%) with decreases in all other major groups.

FIGURE 43: CHANGE IN OCCUPATION (PUR) STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

5.2 Place and Method of Travel to Work (PUR)

Key Points

- Around 25% of residents work in the LGA (self-containment rate)
- Most people use *Vehicles* to get to work (high dependency of 65%)
- Increase in proportion of people using *Public Transport* +3.7%, still below GS growth average +5%
- The majority of workers commute to *Sydney (C)*, *Inner West* and *Parramatta*

LGA trends and Comparison

Vehicles are and have continued to be the primary mode of transport to work for Canterbury-Bankstown's residents. There has been a relative increase in the percentage of *Public Transport* commuters, but with the totals still being low.

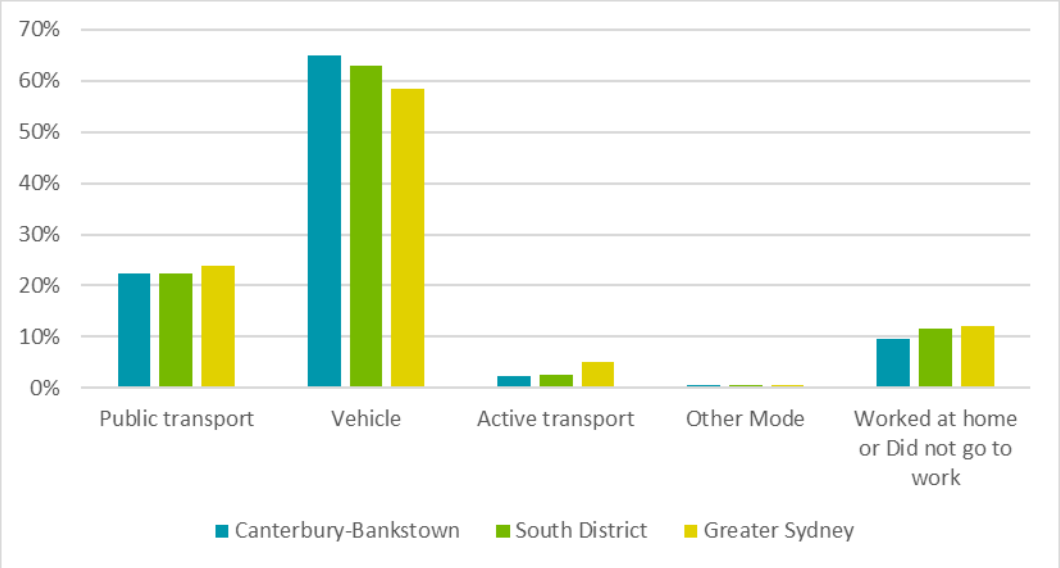
TABLE 24: METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	30,492	88,789	3,193	808	13,183
2011	24,432	81,467	3,043	628	12,240
2006	21,075	75,742	3,292	535	12,155
Growth (Total)	***9,417***	***13,047***	*-99*	*273*	*1,028*
Growth (CAGR %)	***20.28%***	*8.27%*	*-1.52%*	*22.89%*	*4.14%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Canterbury-Bankstown's proportion of workers using *Vehicles* to commute to work (65%), is higher than both the District (62.9%) and GS (58.5%) averages. *Public Transport* rates are slightly lower (22.3 %) compared to the other two areas - (22.5% and 24% respectively). *Active Transport* options (2.3%) are similar compared to District (2.6%) and lower to GS (5%).

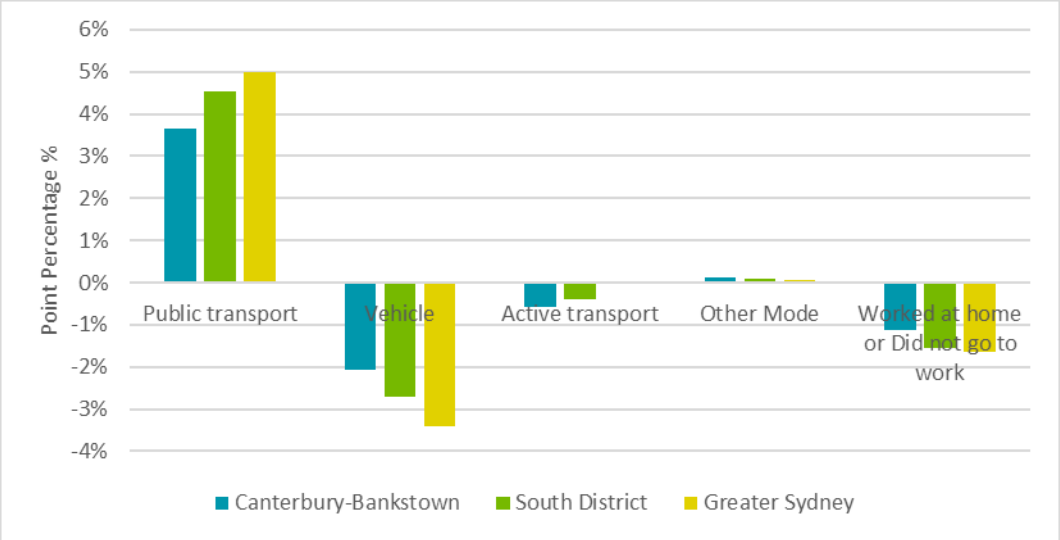
FIGURE 44: METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Overall, Canterbury-Bankstown and the District are showing similar negative growth tendencies in the use of *Vehicles* (about -2 to -3%) and positive in *Public Transport* (about +3.5 to +4.5%), while the GS area is experiencing a more pronounced shift towards a larger rate of *Public Transport* usage (+5%) and a steady drop in the number of commuters using *Vehicles* (-3.4%).

FIGURE 45: CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

The major destinations (Place of Work) for commuters (residing in but working outside of Canterbury-Bankstown) are the LGAs of *Sydney (C)* (25.9%), *Inner West* (7.7%), *Parramatta* (6.2%), *Cumberland* (5%) and *Georges River* (4.8%). The largest number of workers are still employed locally within Canterbury-Bankstown (26.5%).

FIGURE 46: TOP EMPLOYMENT LOCATIONS FOR CANTERBURY-BANKSTOWN'S RESIDENTS (2016)

Geography (POW)	2016	%
Sydney (C)	25,642	25.9%
Inner West	7,648	7.7%
No Fixed Address (NSW)	7,248	7.3%
Parramatta	6,163	6.2%
Cumberland	4,937	5.0%
Georges River	4,767	4.8%
Botany Bay	4,104	4.2%
Liverpool	4,062	4.1%
Strathfield	2,948	3%
Fairfield	2,859	2.9%

Source: ABS Census 2016 (TableBuilder Pro)

5.3 Employment, Industry of Employment, Occupation and Method of Travel to Work (POW)

Key Points

- High proportion of *Population Serving* jobs in Canterbury-Bankstown
- *Health and Education* is the fastest growing employment sector in the LGA
- Significant in proportion of *Industrial*, greater than District and GS levels
- Self-sufficiency of 41.5%
- Large ratio of people using *Vehicle* in commuting to and within Canterbury-Bankstown, however *Public Transport* is increase as a proportion

Local Context

Employment (POW)

Canterbury-Bankstown's major centres of employment are located around major employment lands in *Condell Park* (11,695), *Chester Hill - Sefton* (6,945) and *Chullora* (6,286) as well as *Bankstown* (8,134), *Bankstown CBD* (7,222) and *Canterbury (South) - Campsie* (6,155), with the remaining suburbs at levels approximately between 2,000 and 4,000 jobs.

Similarly, growth totals have been highest in *Canterbury (South) – Campsie* (+1,151), *Chester Hill - Sefton* (+1,069) and *Chullora* (+1,052) with relative growth rates highest in *Bass Hill - Georges Hall* (+24%), *Lakemba* (+24%) and *Canterbury (South) - Campsie* (+23%). *Canterbury (North) - Ashbury* has experienced a drop of about -531 jobs (-22%).

TABLE 25: SUBURB EMPLOYMENT TOTALS AND GROWTH RATES (2011-2016)

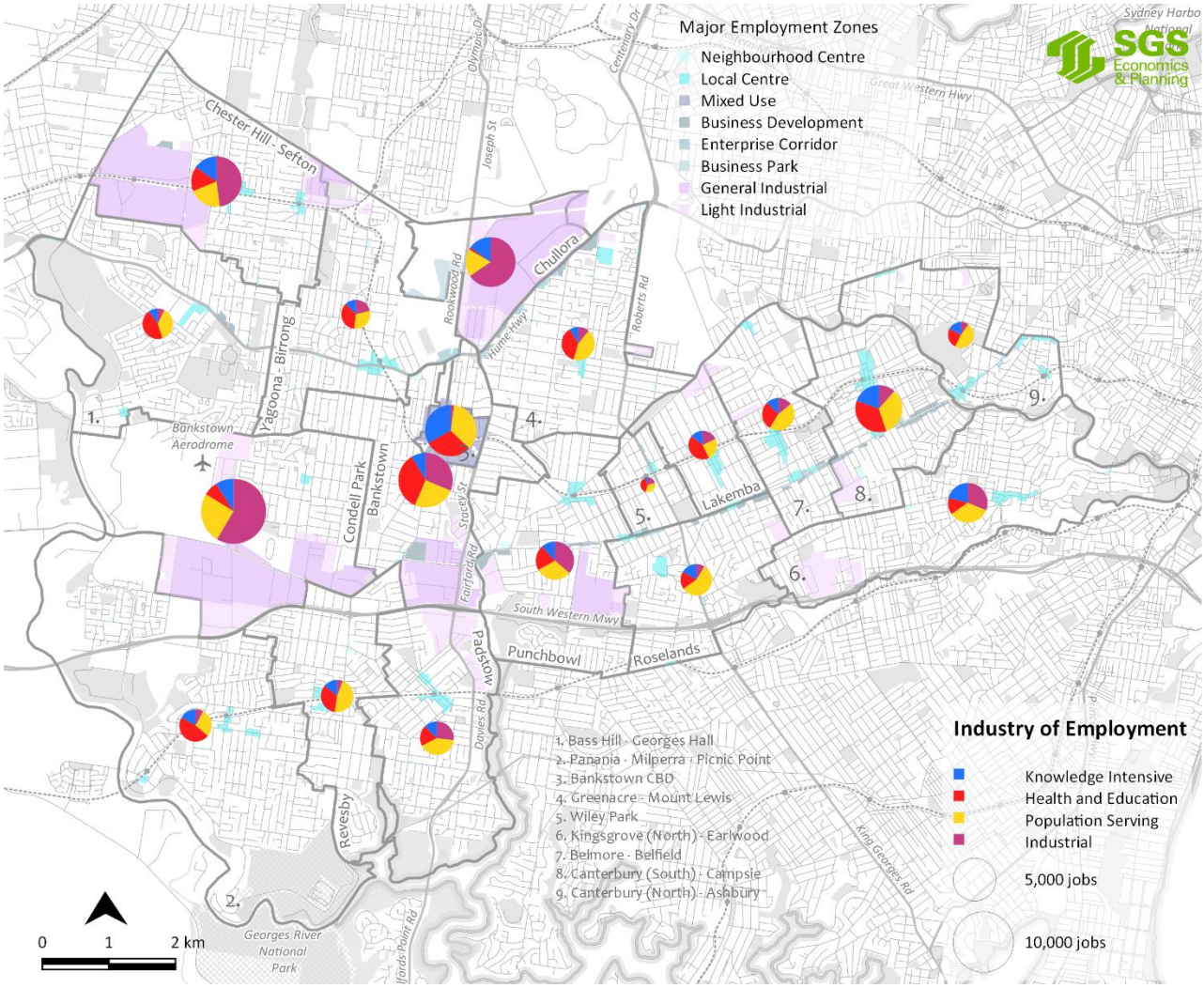
Geography	2011	2016	Growth	Growth (%)
Condell Park	11,641	11,695	54	0%
Bankstown	7,631	8,134	503	7%
Bankstown CBD	6,519	7,222	703	11%
Chester Hill - Sefton	5,876	6,945	1,069	18%
Chullora	5,774	6,826	1,052	18%
Canterbury (South) - Campsie	5,004	6,155	1,151	23%
Kingsgrove (North) - Earlwood	4,477	4,403	-74	-2%
Punchbowl	3,387	4,046	659	19%
Padstow	3,276	3,136	-140	-4%
Greenacre - Mount Lewis	2,753	3,090	337	12%
Panania - Milperra - Picnic Point	2,538	2,931	393	15%
Belmore - Belfield	2,616	2,904	288	11%
Revesby	2,466	2,897	431	17%
Roselands	2,652	2,698	46	2%
Bass Hill - Georges Hall	2,090	2,582	492	24%
Yagoona - Birrong	2,081	2,367	286	14%
Lakemba	1,841	2,282	441	24%
Canterbury (North) - Ashbury	2,379	1,848	-531	-22%
Wiley Park	393	605	212	54%

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

Industry of Employment (POW)

Canterbury-Bankstown's suburbs are mainly orientated towards *Population Serving* and *Industrial* jobs. Large *Industrial* employers are present in *Condell Park* (6,300), *Chullora* (4,301) and *Chester Hill - Sefton* (3,098). Overall, most of the suburbs have a relatively diverse mix of jobs. *Bankstown CBD* has a bigger proportion of *Knowledge Intensive* jobs, with *Canterbury (South) - Campsie* and *Bankstown* orientated towards *Health and Education* industries (due to Hospitals).

FIGURE 47: SUBURB INDUSTRY OF EMPLOYMENT (POW) TOTALS – MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 26: SUBURB INDUSTRY OF EMPLOYMENT (POW) TOTALS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Condell Park	982	768	2,724	6,300
Bankstown CBD	2,510	2,240	2,667	149
Bankstown	619	2,518	1,807	2,251
Chullora	997	92	1,180	4,301
Chester Hill - Sefton	997	1,024	1,350	3,098
Canterbury (South) - Campsie	1,168	2,116	1,987	685
Kingsgrove (North) - Earlwood	881	558	1,414	1,290

Punchbowl	454	807	1,156	1,373
Greenacre - Mount Lewis	256	1,099	1,298	321
Padstow	377	577	1,202	785
Panania - Milperra - Picnic Point	479	1,342	805	222
Revesby	394	945	1,304	158
Belmore - Belfield	341	788	1,229	380
Roselands	437	479	1,493	230
Bass Hill - Georges Hall	253	1,150	957	183
Lakemba	319	950	556	389
Yagoona - Birrong	267	795	668	458
Canterbury (North) - Ashbury	311	453	846	177
Wiley Park	43	220	199	119

Source: ABS Census 2016 (TableBuilder Pro)

LGA trends and Comparison

Employment (POW)

Canterbury-Bankstown has grown by an additional 2,828 jobs (CAGR % of +1.69%) between 2006 and 2016, considerably lower than the District (+3.85%) and Greater Sydney (+8.72%) averages.

TABLE 27: EMPLOYMENT (POW) TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (%)
Greater Sydney	1,644,686	1,745,269	1,944,153	299,467	8.72%
South District	172,815	171,809	186,392	13,577	3.85%
Canterbury-Bankstown	82,759	79,144	85,587	2,828	1.69%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Industry of Employment (POW)

Canterbury-Bankstown's fastest growing industries are *Health and Education* and *Population Serving*, with *Health and Education* having the highest growth totals.

TABLE 28: INDUSTRY OF EMPLOYMENT (POW) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Knowledge Intensive	Health and Education	Population Serving	Industrial
2016	12,499	19,560	25,951	23,427
2011	12,240	16,105	22,794	27,086
2006	12,053	14,695	23,147	31,951
Growth (Total)	*446*	***4,865***	*2,804*	***-8,524***
Growth (CAGR %)	*0.24%*	***13.45%***	*3.71%*	***-15.13%***

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

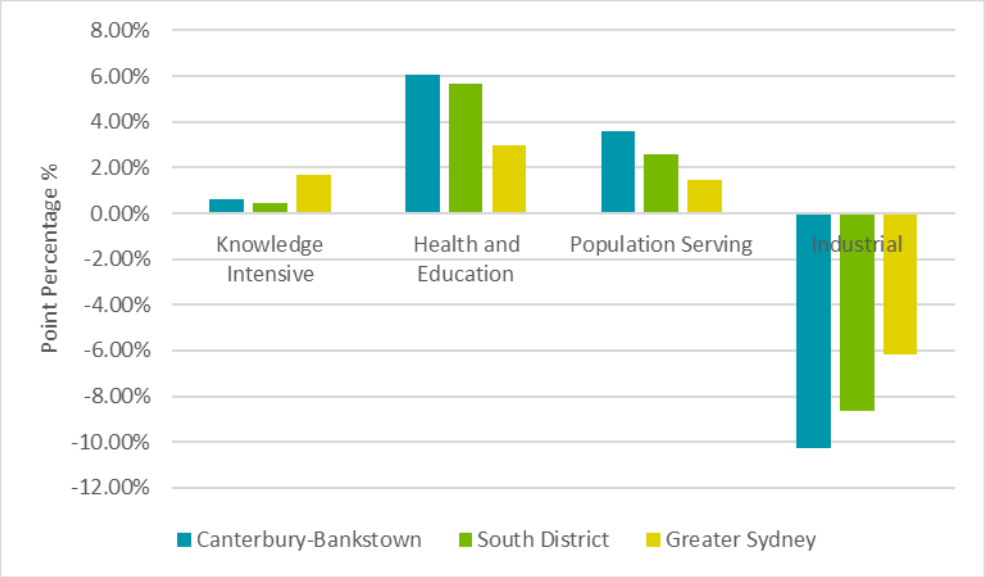
Canterbury-Bankstown has a bigger proportion of *Industrial* jobs (28.7%) and a smaller rate of *Knowledge Intensive* jobs (15.3%) compared to District and GS.

FIGURE 48: INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

The growth tendencies are showing a further increase of *Health and Education* (+6%) at higher rates than both the District and GS. The decline of *Industrial* jobs is present across all three areas (range from -6% to -10%).

FIGURE 49: CHANGE IN INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Occupation (POW)

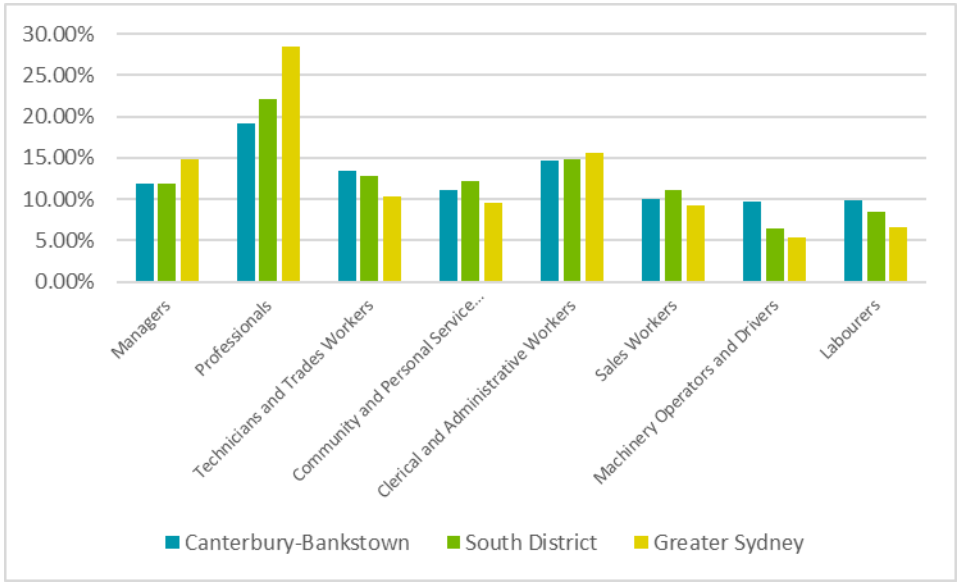
Canterbury-Bankstown has a relatively even distribution of different occupations with a slightly higher ratio of *Professionals* (19.1%) (still lower the GS average) and *Clerical and Administrative Workers* (14.7%) (slightly lower than District and GS averages).

TABLE 29: OCCUPATION (POW) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
2016	10,123	16,169	11,355	9,358	12,445	8,539	8,275	8,387
2011	9,830	14,591	11,538	6,867	12,377	7,798	7,725	7,589
2006	10,193	13,666	12,737	5,928	12,632	8,635	9,263	8,672
Growth (Total)	*-70*	***2,503***	***-1,382***	***3,430***	*-187*	*-96*	*-988*	*-285*
Growth (CAGR %)	*-1.31%*	*7.10%*	*-7.56%*	***23.10%***	*-1.65%*	*-2.18%*	*-6.93%*	*-3.80%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

FIGURE 50: OCCUPATION (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

The highest growing occupation group in Canterbury-Bankstown is the *Community and Personal Service Workers* (+3.8%) and the *Professionals* (+2.4%) category. Although the *Managers* category is experiencing growth at the GS level, it is showing stagnation in Canterbury-Bankstown.

FIGURE 51: CHANGE IN OCCUPATION (POW) STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Method of Travel to Work (POW)

A high proportion of employees use *Vehicles* (77.9%) for commuting to or within Canterbury-Bankstown, making the overall structure mostly homogenous. These levels are also higher when compared to the District (73%) and GS (56.9%).

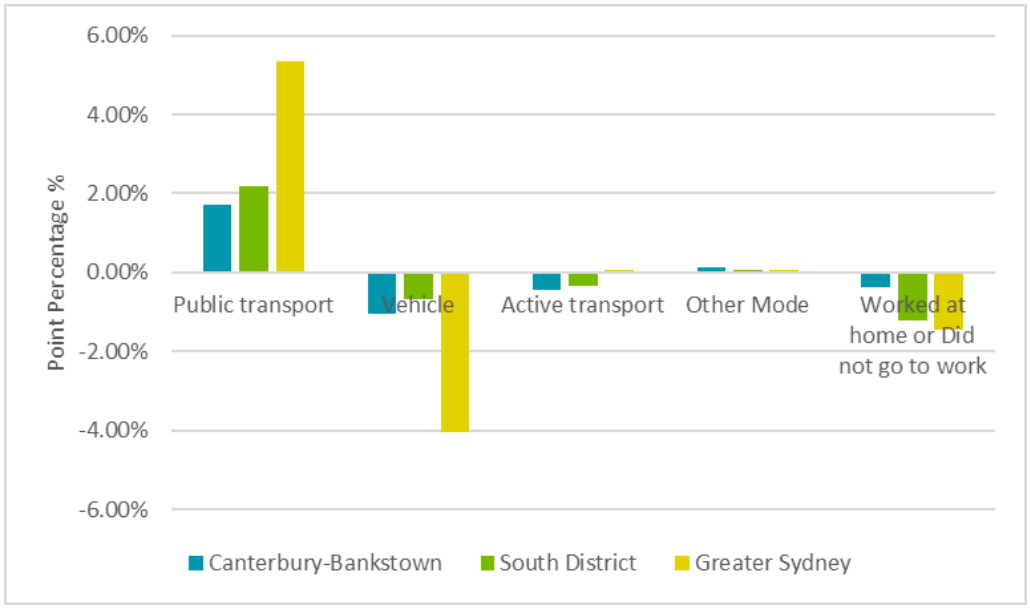
TABLE 30: METHOD OF TRAVEL TO WORK (POW) TOTALS AND GROWTH RATES IN CANTERBURY-BANKSTOWN (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	6,507	66,393	2,512	450	9,360
2011	4,890	61,923	2,453	335	8,625
2006	4,829	64,406	2,769	313	9,265
Growth (Total)	***1,678***	***1,987***	*-257*	*137*	*1,678*
Growth (CAGR %)	***16.08%***	*1.53%*	*-4.75%*	*19.90%*	*16.08%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Public and Active Transport options are at negligible levels, with *Public Transport* being lower than the GS average by about -17.5%.

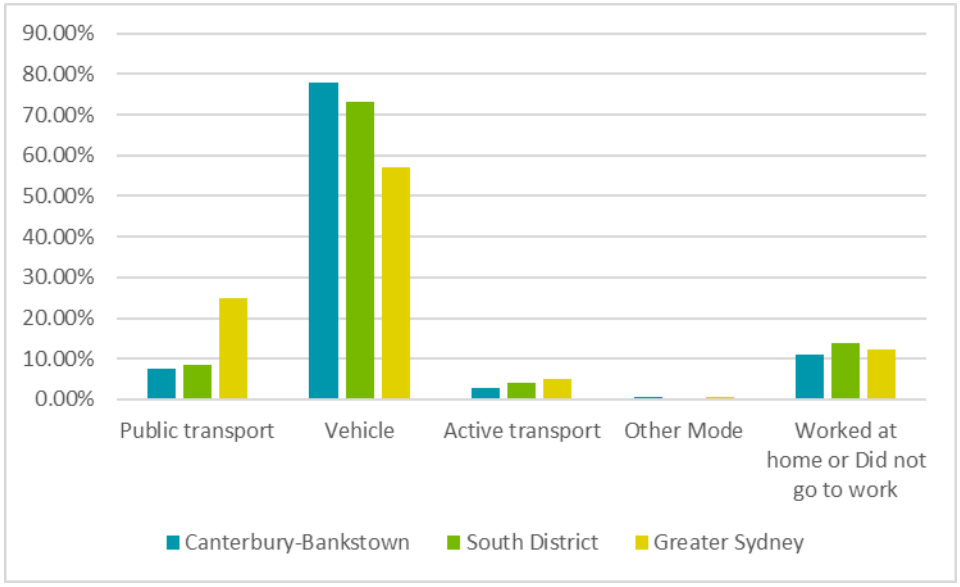
FIGURE 52: METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

However there has been a slight increase in the proportion of commuters using *Public Transport* (+1.7%) to travel to or within Canterbury-Bankstown, with minor growths trends in *Public Transport* usage, with all other categories declining.

FIGURE 53: CHANGE IN METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Future Projections

Employment (POW)

Canterbury-Bankstown is projected to grow an additional 5.77% each five year or 22,133 jobs between 2021 and 2036, which is a significantly higher compared to historical trends (a 0.08% growth rate each five year between 2006 and 2016). The growth percentage discrepancy between Canterbury-Bankstown and the District/GS is also forecasted to diminish.

TABLE 31:FORECASTED EMPLOYMENT (POW) TOTALS AND GROWTH RATES (2021-2026)

Geography	2021	2026	Growth 21-26	2031	Growth 26-31	2036	Growth 31-36	Total Growth	CAGR (%)
Greater Sydney	2,712,085	2,929,335	217,250	3,154,622	225,287	3,389,594	234,972	677,508	7.72%
South District	257,370	272,527	15,157	286,374	13,847	303,937	17,563	46,567	5.70%
Canterbury-Bankstown	120,835	129,274	8,439	135,092	5,818	142,968	7,876	22,133	5.77%

Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

5.4 Future Considerations and Directions for other LSPS Studies

Impact of major projects on employment structure

The Sydney to Bankstown Urban Renewal Corridor, Metro and Bankstown Collaboration Area all have the potential to further transform the area, resident workforce and employment structure. Careful consideration of the following points in the employment study could help better understand and anticipate the changes related to these projects:

- How will better access to other major employment hubs (i.e. Sydney CBD) affect self-containment rates?
- What industries and precincts could be affected by the Metro?
- What commercial floorspace may be appropriate to accommodate future local office and retail growth
- Further explore the Bankstown Collaboration Area in context of Planning Priority S8

- Further explore industry breakdown in Condell Park (around Airport and WSU campus) and understand if there is potential for the conglomeration of industries

Casualisation of workforce and a changing economy

Australia's economy is going through a transition as it becomes more orientated to non-industrial sectors and a more flexible, dynamic, part-time based workforce. The following steps can help better understand these trends:

- Further breakdown industry and occupation by labour force status historically to better understand what jobs have mainly been affected using ABS census data
- Using the Demographic Dashboard, explore industry (BIC) projections
- Understand if the casualisation of jobs might affect vulnerable groups (e.g. single parents) by cross tabbing labour force status of parents using ABS census data

Urban services for a growing population

A growing population needs a variety of services, both in context of population serving industries (retail trade and food services) but also from the industrial sector (hardware supply, warehousing, construction). Although manufacturing is declining, there is a large number of other businesses locating in industrial employment lands:

- Using previous GSC work and per capita ratios, approximate the amount of urban services needed in the future and the capacity of existing employment lands
- What population serving industries will there be a growing demand for in the future?
- Ensure that there is careful distinction between the decline in industrial jobs and the need for industrial floorspace. This is particularly pertinent in this sector due to the increase in automation of certain industries that may result in few jobs but an ongoing need for the land use

Traffic congestion and public transport

Trends are showing an increase in the number of people using private vehicles in commuting to work. Further directions to explore might be:

- Explore options on how to leverage increased station capacity by providing adequate supporting services from and to the stations (i.e. active/shared transport options) – "last mile problem"
- Map out Journey to Work data and identify employment hot spots that have potential for new or improved public transport routes

APPENDIX 1 – BROAD INDUSTRY CATEGORIES (BIC) DEFINITION

In conjunction with the Greater Sydney Commission (GSC), SGS Economics and Planning has categorised ANZSIC Divisions into four broad Industry Groups (also known as Broad Industry Categories – BIC). The following table illustrates the classification.

TABLE 32: INDUSTRY GROUPS

ANZSIC 2006 Division Code	ANZSIC 2006 Division Title	Group
J	Information Media and Telecommunications	Knowledge Intensive
K	Financial and Insurance Services	Knowledge Intensive
L	Rental, Hiring and Real Estate Services	Knowledge Intensive
M	Professional, Scientific and Technical Services	Knowledge Intensive
N	Administrative and Support Services	Knowledge Intensive
O	Public Administration and Safety	Knowledge Intensive
P	Education and Training	Health and Education
Q	Health Care and Social Assistance	Health and Education
E	Construction	Population Serving
G	Retail Trade	Population Serving
H	Accommodation and Food Services	Population Serving
R	Arts and Recreation Services	Population Serving
S	Other Services	Population Serving
A	Agriculture, Forestry and Fishing	Industrial
B	Mining	Industrial
C	Manufacturing	Industrial
D	Electricity, Gas, Water and Waste Services	Industrial
F	Wholesale Trade	Industrial
I	Transport, Postal and Warehousing	Industrial

Source: ABS ANZSIC 2006 Support Tool, SGS Economics and Planning and GSC 2016

APPENDIX 2 – UNDERSTANDING DATA AND MEASURES

This report has used a variety of measures in order to better understand trends present in the data from a number of perspectives. Observing indicators from only one perspective can often be misleading. Each perspective (measure) tells a different story and gives a different outlook. This appendix is specifically devised to guide and assist you when analysing the data in this report and help you better understand the original intention of each measure.

Totals - Absolute Values (123)

Totals are the most common used measure for observing data. They are simple, easy to understand and point to straightforward facts. People love using them as they resonate strongly, especially when the numbers are high. For instance, based on the table below, we know we have a large number of people using *Vehicles* (88,789) to travel to work, hence we might end up with a lot of cars on the streets.

METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	30,492	88,789	3,193	808	13,183
2011	24,432	81,467	3,043	628	12,240
2006	21,075	75,742	3,292	535	12,155
Growth (Total)	***9,417***	***13,047***	*-99*	*273*	*1,028*
Growth (CAGR %)	***20.28%***	*8.27%*	*-1.52%*	*22.89%*	*4.14%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Downside: When we have a lot of (similar) values, it might become hard to notice what to pay attention to. Also, understanding how one number (category) compares to other numbers (categories) or sum totals (of all categories) might become hard. Expressing data as a ratio or proportion (%) usually helps us with this.

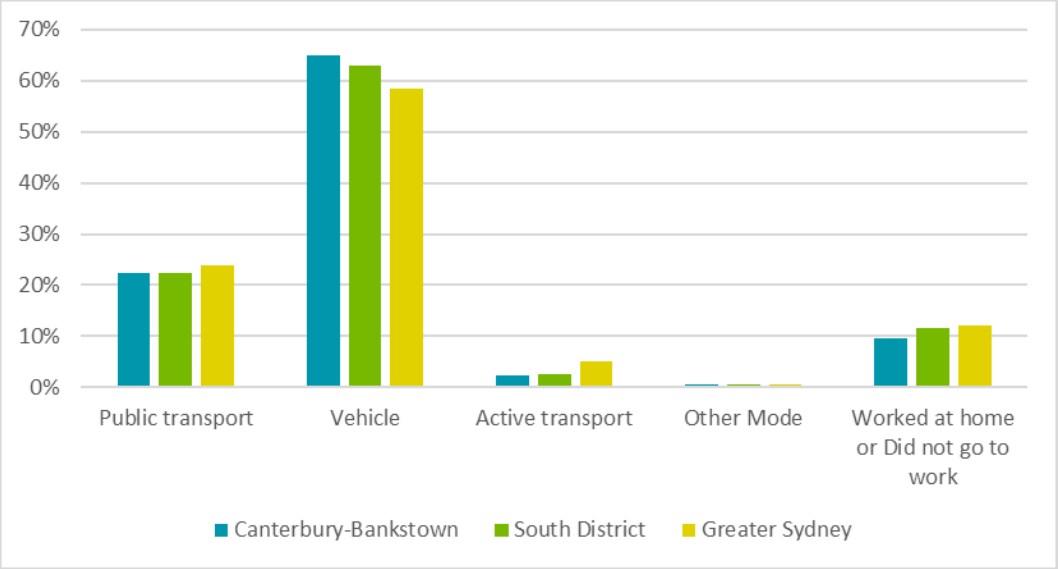
Proportions - Percentage of SUM Total (%)

Proportions, ratios of percentages (name them as you like) usually kick-in handy when trying to understand how something compares to other (sub) categories or SUM totals. This measure is also particularly useful when trying to set up targets.

For instance, we can see that the value of *Vehicles* is quite different when comparing the local level of *Vehicle* usage (30,492) - table above; and the Metropolitan scale (x number of people use *Vehicles*). If someone asked us to put that in context and measure the RATE of *Vehicle* use, we couldn't really achieve it without using a relative measure. However, if expressed as a percentage of the sum total, we would know that the use of *Vehicles* is actually higher at the local level Metro level - see graph below.

Or, let's say our goal is to at least have 30% of people using Public Transport in the future. It makes much more "sense" to express that using proportions (%) than total numbers – e.g. our goal is to have 45,448 people using public transport. Also, the total might change, so 30% isn't 45,448 but a different value.

METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Downside: By using percentages or ratios, we can often oversight the overall importance of something in real life terms. Although 2.34% (ratio of people using *Active Transport*) might seem low and negligible, planning for 3,193 cyclists is still quite important. The larger the grand total is, the bigger the chance for such an oversight is to occur.

Growth Totals - Absolute Values (+- 123)

Again, similar to totals, growth totals are good for understanding the overall impact of some sort of change. From 2006 to 2016, the number of people using *Vehicles* has increased by +13,047 meaning we have a large number of additional vehicles on the streets that we need to plan for. Also, we have an additional +9,417 people using *Public Transport* probably requiring additional services.

Downside: However, growth totals can often "hide" important structural changes that occur over a larger period of time. If we disregarded *Active Transport,* we can see that all modes of transport have experienced a growth between 2006 and 2016. It is easy to jump to a conclusion and say the fastest growing mode of transport is *Vehicles.* However, if we compared the PROPORTION of people using *Vehicles* in 2006 to 2016, we will that the opposite is actually true - see next heading.

Proportional Changes - Point Percentages (%)

Proportional changes are good in anticipating broader structural changes. This means, that if the current growth trends continued, even though the growth total of *Public Transport* (+9,147) is lower than that of *Vehicles* (+13,047), the number of people using *Public Transport* would eventually "catch up" in the overall proportion. If we translated the first table to proportions instead of totals, it would look something like this:

METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

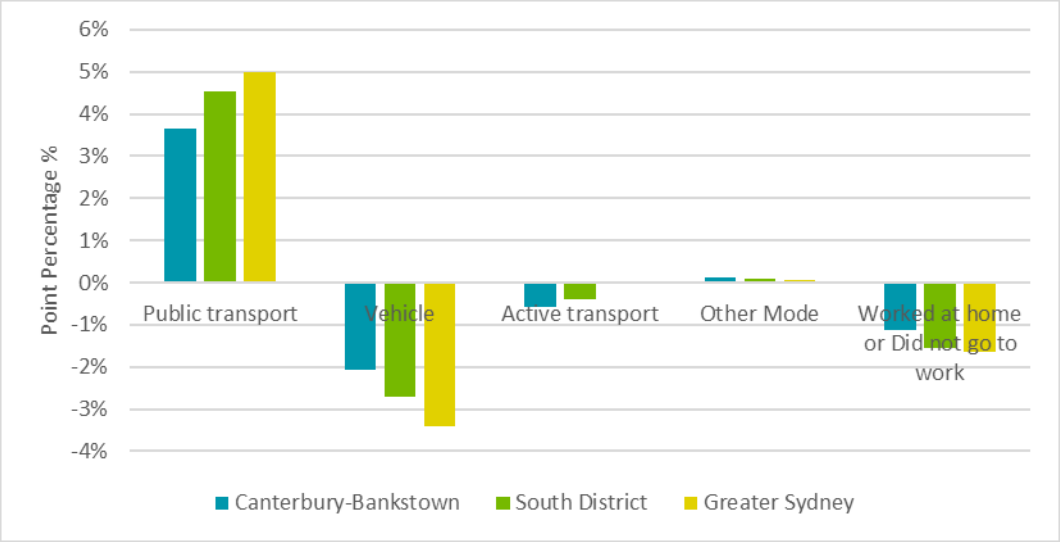
Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	22.3%	65.1%	2.3%	0.6%	9.7%
2011	20.1%	66.9%	2.5%	0.5%	10.0%
2006	18.7%	67.1%	2.9%	0.5%	10.8%

Growth (Total)	***9,417***	***13,047***	*-99*	*273*	*1,028*
Growth (CAGR %)	***20.28%***	*8.27%*	*-1.52%*	*22.89%*	*4.14%*

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

This is simply because the initial "base value" was a lot smaller for *Public Transport* compared to *Vehicles*.

CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Growth Percentages - CAGR (%)

Relative growth is a measure good for understanding how much a value has changed over time and relative to itself, as well as comparing rates and trends of different geographic scales. In relative terms, the +9,417 increase of people using *Public Transport* represents a +20.28% increase, while the +13,047 represent a +8.27% compared to a previous value of those indicators.

Downside: However, what relative growth numbers don't "catch" is the base value itself. If looked in more detail the +22.89% of the use in *Active Transport* is higher than both previously mentioned modes, but it only represents an additional +273 commuters.

There is a lot of other things to keep in mind when analysing data and using descriptive statistics to measure performance. Only a small part of it has been mentioned in this appendix. We recommend to observe indicators from a variety of perspectives and angles prior to making any conclusions.

APPENDIX 3 – GLOSSARY

This appendix contains a glossary of commonly used acronyms through the report.

ABS – Australian Bureau of Statistics

ANZSIC – Australian and New Zealand Standard Industrial Classification

ASCO – Australian Standard Classification of Occupations

BIC – Broad Industry Category

CAGR (%) – Compounded Annual Growth Rate

District – South District

DPE – Department of Planning and Environment

GRSP – Greater Sydney Region Plan

GS – Greater Sydney

GSC – Greater Sydney Commission

LEP – Local Environmental Plans

LGA – Local Government Area

LSPS – Local Strategic Planning Statement

POW – Place of Work

PP (%) – Point Percentage

PUR – Place of Work

TPA – Transport Performance and Analytics

VET – Vocational Education and Training

SGS Economics & Planning

Contact us

CANBERRA
Level 2, 28-36 Ainslie Place
Canberra ACT 2601
+61 2 6257 4525
sgsact@sgsep.com.au

HOBART
PO Box 123
Franklin TAS 7113
+61 421 372 940
sgstas@sgsep.com.au

MELBOURNE
Level 14, 222 Exhibition St
Melbourne VIC 3000
+61 3 8616 0331
sgsvic@sgsep.com.au

SYDNEY
209/50 Holt St
Surry Hills NSW 2010
+61 2 8307 0121
sgsnsw@sgsep.com.au