

Attachment A5

Social Assessment and Strategy

Social Assessment and Strategy

Woolworths Waterloo

923-925 Bourke Street, Waterloo
Planning Proposal

A note on COVID-19: COVID-19 is an unprecedented global health crisis and economic event that is rapidly evolving. At the current time, the research and analysis of economic and population data – such as forecasts of population or employment growth and so on – reflects a return to “business as usual” scenario, while also noting the potential impacts that may be associated with the COVID-19 virus, travel and border restrictions impacting on migration numbers, and the anticipated return to growth in economic or population indicators.

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Executive Summary

Purpose of this report

This Social Assessment and Strategy has been prepared to support the Planning Proposal by Fabcot Pty Ltd for the development of a new supermarket and mixed-use development at 923 - 925 Bourke Street, Waterloo.

The purpose of this work is to assess the social context and need for the project, and the social benefits and value it has the potential to generate. It explores these issues in the context of relevant strategic drivers for the site and identified community needs for social infrastructure.

The subject site to which the Planning Proposal applies is at 923-925 Bourke Street, Waterloo within the City of Sydney LGA, approximately 4km south-east of the Sydney CBD. Prominently sitting at the corner of McEvoy and Bourke Streets, it is in an area presently experiencing significant change through urban renewal projects which are delivering high-density residential and mixed-use developments.

Proposed development

The Amended Planning Proposal at 923-935 Bourke Street, Waterloo seeks the following amendments to the Sydney LEP 2012 as at August 2022:

- Insert a new clause in Division 5 that provides:
 - A site specific exemption for the site from the 1,000m² cap under clause 7.23 ‘large retail development outside of Green Square Town Centre and other planned centres’, subject to the achievement of defined criteria of site and strategic attributes;
 - A site-specific exemption from the maximum FSR provisions to allow for a further increase in the site’s FSR of 0.5:1, but only where that additional FSR is used for the purposes of a below ground retail development (reflecting the addition of the full-line supermarket floorspace). The exemption would bring the site’s total maximum FSR to 2.7:1 (inclusive of base FSR, community infrastructure and design excellence bonuses); and
- In relation to building height, provide new mapping to reflect an increase from 15m to between 24m and 27m within the site (between 5 to 7 storeys) to redistribute massing to achieve the indicative mixed-use development.

The broad intent of the Planning Proposal is to achieve a mixed-use development outcome including a supermarket, supporting retail/commercial, community and residential land uses, which facilitates a suitable urban form to support local strategic planning intent for the establishment of a new ‘neighbourhood centre’ within the site. Accompanying amendments to the *Sydney Development Control Plan 2012* (Sydney DCP 2012) will be required to support this outcome. These amendments will address key design and development outcomes, including site-specific provisions related to the future built form, the provision of the publicly accessible through site link, active frontages, access, vegetation, design excellence, local infrastructure and sustainability

The Planning Proposal will facilitate the rejuvenation of the site with an indicative reference scheme accommodating a mixed-use development, including a 3,200m² full-line Woolworths supermarket (around 20,000 stock items and a 2,800m² main trading area) in a subterranean level, together with a speciality retail podium and servicing, commercial floorspace and residential apartments. The amended indicative reference scheme underpinning the Planning Proposal totals some 17,575m² of Gross Floor Area (GFA), comprising:

- 3,200m² of supermarket GFA
- 1,670m² of retail GFA (inclusive of circulation and lobbies)
- 2,025m² of commercial GFA (inclusive of circulation and lobbies); and
- 10,680m² of residential floorspace, including some 121 dwellings.

Basement parking is accommodated for a total of 216 cars, together with ground level through-site links and podium and rooftop communal residential facilities. The Proponent intends to deliver, as part of this Planning Proposal, affordable housing contributions, electric vehicle charging facilities, site specific sustainability measures and local infrastructure by way of a Voluntary Planning Agreement (VPA) to be entered into with Council.

Social issues and trends impacting this proposal

The proposed development has been informed by a range of social issues and trends, explored in **Section 6**. This includes urban renewal driving population growth and change, with the ongoing transformation of Green Square and the Waterloo State Significant Precinct – including the Waterloo Metro over station development, being key drivers for the need for increased infrastructure and services.

The need for places and spaces for people to meet, mingle and socialise – including retail, community and cultural infrastructure – has been identified as particularly important to social sustainability of urban neighbourhoods undergoing renewal, supporting social cohesion and social capital development – and longer term community resilience – over time. Additionally, the development of local neighbourhoods that enable walkable access to a range of facilities and amenities to meet residents' daily needs has been identified as important.

Community perspectives on the proposal

Feedback received from community members and stakeholders on the proposed development (refer to **Section 7**) highlights the following issues:

- 65% of participants agreed that the proposal would benefit the current and future community
- Creating a community focused space was a priority for most participants. The three most important community benefits were seen to be a premium food and retail destination close to home; a high quality plaza for community gatherings, and targeting a Five Star Green Star sustainability rating for key components of the development.
- There is a strong desire for a one-stop-shop destination with support for a Woolworths supermarket at this site.
- Participants want to see a development that is creative, lively, has its own unique character, while contributing to the atmosphere of Waterloo.
- The development needs to consider community needs, while minimising impacts through sustainable and innovative design.

Social assessment

This provides a social assessment of the Planning Proposal, with reference to the key social factors set out in the NSW DPIE Social Impact Assessment Guideline 2021. These include the proposals potential impact on the local community in relation to way of life; access to use and use of infrastructure; health and wellbeing, local livelihoods and others.

The assessment indicates that a range of positive benefits for local communities have potential to be delivered through the proposed development, with particular regard to the proposed community benefits outlines at **Section 8.4**.

Social Strategy

The final section of the report sets out recommended directions for considering and optimising social sustainability outcomes through the proposed development, drawing on the evidence base and social assessment presented in this report.

The key directions set out **Section 10** have been developed through the range of evidence and analysis presented in the report. They are:

- Creating a vibrant new neighbourhood centre for Waterloo
- Supporting local socio-economic development.

1.0 Introduction

1.1 Overview of this report

This Social Assessment and Strategy has been prepared to support the Planning Proposal by Fabcot Pty Ltd for the development of a new supermarket and mixed-use development at 923 - 925 Bourke Street, Waterloo.

The purpose of this work is to assess the social context and need for the project, and the social benefits and value it has the potential to generate. It explores these issues in the context of relevant strategic drivers for the site and identified community needs for social infrastructure.

The report is structured as follows:

- Baseline social context
 - Overview of the social context of the proposal (**Section 2.0, 5.0 and 6.0**)
 - Review of strategic policy drivers for the development (**Section 4.0**)
 - Review of community and stakeholder perspectives (**Chapter 7.0**)
- Social assessment
 - Identification of community needs for local social infrastructure and amenities (**Chapter 8.0**)
 - Summary assessment of the likely social impacts of the project (**Chapter 9.0**)
- Social Strategy: exploration of the broader social value that may be delivered through the project and opportunities to optimise positive social outcomes (**Chapter 10.0**).

1.2 Woolworth Group's goals for thriving communities

The Planning Proposal for the site is aligned with the Woolworths Group's Sustainability Plan 2025, which sets out a *"new program of positive change for our people, our planet and our product"*.

This includes five principles guided by the United Nations 2030 Sustainable Development Goals:

- We act like a leader and speak up on issues that matter,
- We care for, and unlock the potential of, our people,
- We have a positive impact on the planet,
- We apply circular thinking in everything we do.

The Woolworths Group is committed to future sustainability and seeks to exert a positive impact on their customers and communities, create ethical partnerships, increase healthier choices for consumers, and reduce food waste and carbon emissions. The proposed development seeks to deliver on these objectives through the provision of social benefits, including community infrastructure delivery.

2.0 Site and spatial context

2.1 Site location

The site is located at 923-935 Bourke Street, Waterloo within the City of Sydney LGA, approximately 4km south-east of the Sydney CBD. Prominently sitting at the corner of McEvoy and Bourke Streets, it is in an area presently experiencing significant change through urban renewal projects which are delivering high-density residential and mixed-use developments.

The site benefits from close proximity to the Green Square Train Station (900m south), the new Waterloo Metro Station to be completed in 2024 as part of the Sydney Metro Northwest Project (1.2km north-east) and a number of key frequent bus routes. It is approximately 700m to the north of the Green Square Town Centre, an identified Strategic Centre within the established centres hierarchy, present in the Sydney Region Plan and Eastern District Plan.

The site’s locational context is illustrated in **Figure 1**.

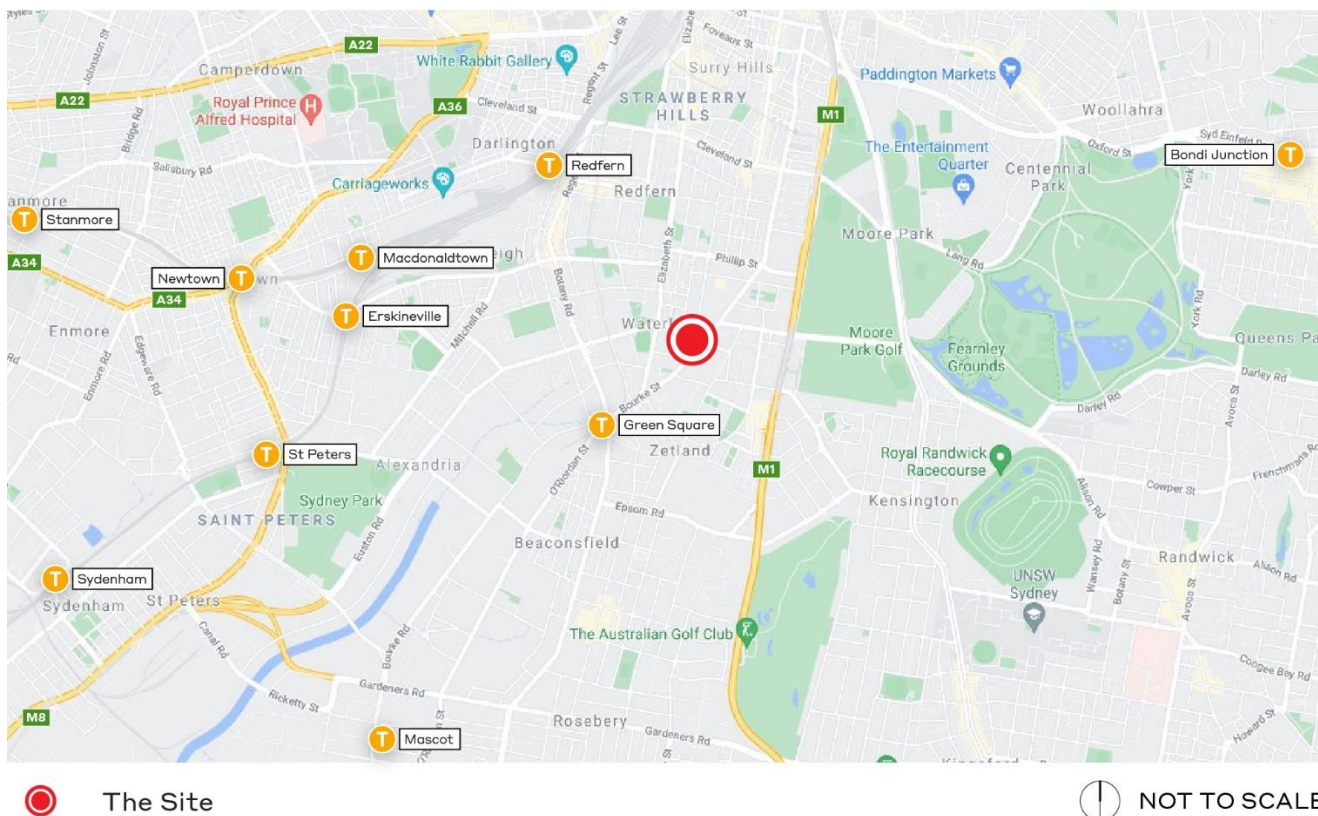


Figure 1 Site locational context

Source: Google Maps

2.2 Site description

The site is irregular in shape and has a total area of approximately 6,534sqm and a perpendicular depth of 58m. It is bounded by McEvoy Street to the north, Bourke Street to the east, Young Street to the west and the rear of properties with a frontage to Powell Street to the south. It is located in the Waterloo Park locality, which is characterised by primarily low to medium scale mixed use development with higher buildings located along the Bourke Street spine.

The site is legally described as Lot 10 D.P. 705894 – Lots 1-3 SP 22322, which contains three separate strata allotments.



 The Site

 NOT TO SCALE

Figure 2 Aerial of site and surrounds

Source: Nearmap

2.3 Existing and surrounding development

Development surrounding the site generally comprises a mix of industrial land, residential and commercial uses with ground floor retail (including restaurants) in buildings of varying heights and styles. Land surrounding the site is also subject to future development and urban renewal. The Green Square train station is located approximately 900m south west of the site where there is an establishment of local population serving retail and services.

Directly north of the site is the 9.25Ha Danks Street South Precinct. A development application for early works including demolition, excavation and preliminary remediation of the land was approved on 2 November 2020, however this consent does not approve site suitability for commercial or residential uses and therefore the future land use mix at the site is yet to be determined.

2.4 Urban renewal context

The site is within the broader Green Square Urban Renewal Area – a major growth centre in within the South Sydney region, which encompasses the suburbs of Green Square, Beaconsfield, Zetland, Alexandria, Rosebery, and Waterloo. It is adjacent to the Lachlan Precinct, an area generally bounded by Bourke, Lachlan, and South Dowling Streets, and O’Dea Avenue.¹

Green Square is a \$540+ million City of Sydney-driven urban renewal initiative transforming one of Sydney’s major inner industrial precincts into a high amenity, mixed-use neighbourhood. It is one of Australia’s fastest growing neighbourhoods, with the population expected to peak at 61,000 residents and 21,000 workers by 2030. The Green Square town centre is at the heart of this precinct, operating as major strategic centre with district scale social infrastructure.

The Lachlan Precinct immediately to the east of the site has been established by the City of Sydney as a primarily residential neighbourhood, with high levels of active retail and commercial frontages along Archibald Avenue.² This includes mixed-use developments such as The Finery (Mirvac), a combination of residential, commercial, and retail uses to form a “strong gateway to the Lachlan Precinct.”³

It has been recognised that for the growing population of Green Square to be adequately supported, it is necessary to deliver “everything needed to made large cities liveable: a thriving town centre and main street, a sense of community... and of course sustainable transport options allowing people to easily walk or cycle.”⁴ As such, the renewal of the precinct emphasises the delivery of world-class community facilities, enhanced urban connectivity, and environmental sustainability.⁵



Figure 3 Green Square Library – community infrastructure for the growing population

Source: Books and Publishing

¹ Draft Amendment – South Sydney Development Control Plan 1997: Urban Design – Part G: Special Precinct No.9 Green Square (Lachlan Precinct)

² The Urban Developer 2018, *Crown Group Continues Sydney Development Roll Out with Waterloo Application*, <https://theurbandeveloper.com/articles/crown-group-continues-sydney-development-roll-out-with-waterloo-application>

³ Mirvac 2019, *the finery, nsw*, <https://design.mirvac.com/projects/News/the-finery-nsw>

⁴ City of Sydney, *Green Square*,

<https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwi606TfrOvAhX36XMBHeU3C2AQFjABegQIBBAD&url=https%3A%2F%2Fwww.ap.h.gov.au%2FDocumentStore.ashx%3Fid%3D0ef7e43c-805f-47ea-85c5-f1e453759413%26subid%3D410360&usg=AOvVaw22-buqgsV56DInU8vPujeE>

⁵ City of Sydney 2021, *Green Square*, <https://www.cityofsydney.nsw.gov.au/green-square>

Waterloo Redevelopment Precinct

The Waterloo State Significant Precinct – in proximity to the subject site – is set to undergo large-scale urban renewal in the delivery of new homes, shops, major transport services, community facilities, parks, and open spaces over the next 20 years. The precinct covers an area of 20Ha and will include the development of the Waterloo Metro Quarter and the redevelopment of Waterloo Estate.⁶

The Waterloo Metro Quarter development aligns with the delivery of the Sydney Metro City & Southwest and the new Waterloo Station, scheduled to open in 2024, approximately 1.2km north west of the site. The Quarter will encompass an area above and around the station, bounded by Botany Road, Cope Street, Raglan Street, and Wellington Street.⁷

The future Metro Station will catalyse the revitalisation of Waterloo, support the southern extension of the CBD, take pressure off of Redfern and Green Square stations, and providing a new commuter rail link to key employment areas in the Sydney CBD, North Sydney, and Barangaroo.⁸

The planned Waterloo Metro Quarter over station development will comprise five buildings, including three towers and two mid-rise buildings above and adjacent to the station.⁹ Increased population and activity in the Waterloo area arising from this will drive demand for additional facilities and services.

Following the announcement of the new Waterloo Metro Station, the Waterloo Estate was identified by the NSW Government's Communities Plus program as a key site to deliver new social and affordable housing alongside private market housing over the next 15-20 years.¹⁰



Figure 4 Waterloo Metro Quarter – artist's impression

Source: Urban

⁶ NSW DPIE 2020, *Waterloo State Significant Precinct*, <https://www.planning.nsw.gov.au/Plans-for-your-area/State-Significant-Precincts/Waterloo>

⁷ NSW DPIE 2020, *Waterloo Metro Quarter*, <https://www.planning.nsw.gov.au/Plans-for-your-area/State-Significant-Precincts/Waterloo/Waterloo-Metro-Quarter>

⁸ Sydney Metro 2018, *Waterloo Station*, <https://www.sydnemetro.info/station/waterloo-station>

⁹ NSW DPIE 2020, *Waterloo Metro Quarter Over Station Development*, <https://www.planning.nsw.gov.au/Assess-and-Regulate/State-Significant-Projects/Sydney-Metro/Waterloo-Metro-Quarter-Over-Station-Development>

¹⁰ NSW DPIE 2021, *Waterloo Estate*, <https://www.planning.nsw.gov.au/Plans-for-your-area/State-Significant-Precincts/Waterloo/Waterloo-Estate>

3.0 Proposed development

3.1 Planning Proposal

This Planning Proposal to which this social assessment relates requests the City of Sydney Council to amend the *Sydney Local Environmental Plan 2012* (Sydney LEP 2012) relating to the site. Ethos Urban has prepared this Planning Proposal on behalf of Fabcot Pty Ltd.

The purpose of this Planning Proposal is to primarily introduce a site-specific exemption to the retail floor area cap outside of Green Square Town Centre and other planned centres. In addition, amendments are sought to the height of buildings and floor space ratio (FSR) development standards for the site under Sydney LEP 2012.

The broad intent of the Planning Proposal is to achieve a mixed-use development outcome including a supermarket, supporting retail/ commercial, community and residential land uses, which facilitates a suitable urban form to support local strategic planning intent for the establishment of a new 'neighbourhood centre' within the site. Accompanying amendments to the Sydney Development Control Plan 2012 will be required to support this outcome.

3.2 Key priorities for the project:

Fabcot (the proponent) has identified the following strategic priorities for the project:

- A premium food and retail destination for local residents to shop close to home
- A mixed-use development with retail, residential, commercial and community uses
- High quality public plaza
- Affordable housing contribution
- Targeting a Five Star Green Star sustainability rating for components of the development
- Easy active transport access – by bike or on foot
- Convenient parking, including rideshare and EV charging stations
- Integration of public art that recognises the history of the site.

3.3 Development vision – indicative reference scheme

The Planning Proposal will facilitate the renewal of the subject site with an indicative reference scheme accommodating a mixed-use development, including a Woolworths supermarket of 3,200sqm (with around 20,000 stock items and 2,800sqm main trading area) below ground level, along with speciality retail at podium level, along with servicing, commercial floorspace and residential apartments.

The indicative reference scheme totals some 17,575sqm of Gross Floor Area (GFA), comprising a 3,200sqm of basement level supermarket GFA; 1,670sqm of retail GFA; 2,025sqm of community/ commercial GFA, and 10,680sqm of residential floorspace, including some 121 dwellings.

Basement parking is accommodated for a total of 216 cars, together with ground level through-site links and podium and rooftop communal residential facilities.

The Proponent intends to deliver, as part of this Planning Proposal, affordable housing contributions, electric vehicle charging facilities, site specific sustainability measures and local infrastructure by way of a Voluntary Planning Agreement (VPA) to be entered into with Council.



Figure 5 Photomontage of indicative public through-site link and neighbourhood centre plaza

Source: Bates Smart

4.0 Strategic policy context

The following section identifies the key social drivers for the site and project, based on a review of the key state and local government policies and strategies.

The following documents have been reviewed:

- *Greener Places* (NSW Government Architect, 2020)
- *The Greater Sydney Region Plan – A Metropolis of Three Cities* (Greater Sydney Commission, 2018)
- *The Eastern City District Plan* (Greater Sydney Commission, 2018)
- *City Plan 2036: Local strategic planning statement* (City of Sydney, 2020)
- *Sustainable Sydney 2030: Community strategic plan* (City of Sydney, 2017)
- *Economic Development Strategy* (City of Sydney, 2013)
- *A City for All: Towards a socially just and resilient Sydney* (City of Sydney, 2019)
- *Open Space, Sports and Recreation Needs Study 2016* (City of Sydney, 2016)
- *Creative City Cultural Policy and Action Plan 2014-2024* (City of Sydney, 2014)
- *Retail Action Plan* (City of Sydney, 2013)
- *Housing for All: Local Housing Strategy* (City of Sydney, 2020)
- *Green Square Draft Infrastructure Strategy and Plan* (City of Sydney, 2015)
- *Sustainability Plan 2025* (Woolworths Group, 2020)

A summary of the key themes of this review is provided in **Table 1** over page.

Table 1 Strategic policy drivers

Themes	Implications for social strategy and assessment	Relevant documents
Growth and renewal priorities for the Green Square Urban Renewal precinct	<ul style="list-style-type: none"> The Eastern City District Plan identifies the Green Square-Mascot area as a significant centre for the Eastern District. It is a priority of the GSC to strengthen the Green Square's role in supporting the Harbour CBD and improve its connection to the rest of Sydney by delivering city-serving transport and safe walking and cycling routes. Priority P3 in the City of Sydney's LSPS recognises the importance of "protecting industrial and urban services in the Southern Enterprise Area and evolving businesses in the Green Square-Mascot Strategic Centre" (LSPS, pg. 168). The Green Square-Mascot strategic centre has the potential to provide 11,400 additional jobs by 2036 if new business and industry opportunities are supported. The City of Sydney envisions Green Square as socially inclusive, with "a mix of homes... catering for a wide range of the population's needs and circumstances" (Green Square Plan, pg. 19). It is a Council priority to see diverse offerings in Green Square, including housing types, recreational opportunities, and social infrastructure. 	<ul style="list-style-type: none"> <i>The Eastern City District Plan</i> (Greater Sydney Commission, 2018) <i>City Plan 2036: Local strategic planning statement</i> (City of Sydney, 2020) <i>Green Square Draft Infrastructure Strategy and Plan</i> (City of Sydney, 2015)
Supporting inner city liveability and social sustainability outcomes	<ul style="list-style-type: none"> It is a priority of the City of Sydney's A City for All strategy to create "a liveable city [which] supports high quality of life and wellbeing" (A City for All, pg. 27). Members of the community should have access to a diverse range of facilities and services within a vibrant local neighbourhood which supports their daily needs. The City of Sydney has identified that residents of the Green Square Urban Renewal Area desire a "community with which they feel connected" (LSPS, pg. 103). Council intends to encourage residential developers to contribute to "vertical communities" which share spaces and other facilities, e.g., spaces for casual social interaction, in order to support community connection and wellbeing. Due to the projected increase in population size and density, the City of Sydney has identified a growing need for open space in order to meet future demand. The future density of Green Square is predicted to be 22,000 people/km² by 2036. The provision of open and green space in Sydney LGA will be required in order to ensure long-term liveability and social sustainability. NSW Government Architect recognises the importance of green and open space for enhancing the quality of urban environments, stating that "green infrastructure is an essential asset which contributes to creating well-designed built environments which are healthy, responsive, integrated, equitable, and resilient" (Greener Places, pg. 14). The strategic priorities of the City of Sydney's Economic Development Strategy include improving productivity and capacity through investment in social infrastructure. Adequate investment in social infrastructure is needed in order to support and retain a growing workforce. The City of Sydney has identified an inadequate supply of affordable space for creative and cultural uses. It is a Council priority to ensure that opportunities for creative and cultural expression are visible, accessible, and sustainable. This includes the delivery of dedicated space and supply of specialised equipment. 	<ul style="list-style-type: none"> <i>City Plan 2036: Local strategic planning statement</i> (City of Sydney, 2020) <i>Open Space, Sports and Recreation Needs Study 2016</i> (City of Sydney, 2016) <i>Creative City Cultural Policy and Action Plan 2014-2024</i> (City of Sydney, 2014) <i>Economic Development Strategy</i> (City of Sydney, 2013) <i>Greener Places</i> (NSW Government Architect, 2020)
Social infrastructure priorities for Green Square	<ul style="list-style-type: none"> The Green Square Urban Renewal Area experienced a population growth of 173% between 2006 and 2016 (9,105 to 24,947) and is set to become the strategic centre of South Sydney. It is a Council priority to ensure that local infrastructure delivery is appropriately aligned with population growth. Sydney LGA is home to an extremely diverse population in terms of age, income, educational attainment, and cultural and linguistic background. It is a Council priority to deliver social infrastructure which meets current and future community needs. 	<ul style="list-style-type: none"> <i>City Plan 2036: Local strategic planning statement</i> (City of Sydney, 2020) <i>Sustainable Sydney 2030: Community strategic plan</i> (City of Sydney, 2017) <i>Green Square Draft Infrastructure Strategy and Plan</i> (City of Sydney, 2015)

Themes	Implications for social strategy and assessment	Relevant documents
Facilitating affordable housing	<ul style="list-style-type: none"> The City of Sydney is currently facing a housing affordability crisis. It is a top priority to increase the supply of affordable rental housing in Sydney, as a sustainable and diverse housing supply is fundamental to the cultural and social vitality, economic growth, and liveability of the city. The demand for more homes is to be balanced with the need for more jobs, sustainable economic growth and the creation of great places. Homes are to be located close to infrastructure, jobs, services and reliable public transport. Providing housing affordability with access to jobs, services and public transport, is prioritised in the City of Sydney, particularly in urban renewal areas, such as Green Square. 	<ul style="list-style-type: none"> <i>Housing for All: Local Housing Strategy</i> (City of Sydney, 2020) <i>A City for All: Towards a socially just and resilient Sydney</i> (City of Sydney, 2019)
Enhancing walkability, accessibility, and connectivity	<ul style="list-style-type: none"> It is a priority of the City of Sydney improve walkability by increasing the safety and comfort of streets, providing direct, pleasant, sociable, and interesting walking connections, and enabling businesses and services to deliver the needs of local communities within easy walking distance. The Greater Sydney Commission's (GSC) <i>Greater Sydney Region Plan</i> outlines a vision of a "30-minute city", in which jobs, services and other quality public spaces are accessible within 30-minutes of people's homes. The GSC is committed to delivering a well-connected city which is safe and walkable, and which optimises community use of infrastructure. 	<ul style="list-style-type: none"> <i>City Plan 2036: Local strategic planning statement</i> (City of Sydney, 2020) <i>The Greater Sydney Region Plan – A Metropolis of Three Cities</i> (Greater Sydney Commission, 2018)
Retail vision and objectives for the local area – activation, convenience, accessibility	<ul style="list-style-type: none"> The City of Sydney recognises that successful urban centres contain complementary facilities, services, and activities which support local needs and economic productivity. It is observed that "food and retail services activate the street during the day and night, while services and businesses on other levels contribute to the economic performance of the centre and attract people" (LSPS, pg. 114). It is a Council priority to ensure that local businesses are accessible to people of all ages and abilities. The City of Sydney are committed to supporting businesses to be more inclusive and accessible, particularly retail, hospitality, and entertainment businesses. Green Square has been identified by the City of Sydney as a growth area for the retail sector. It is a Council priority to support the residents of Green Square and the southern areas of the city through the delivery of sufficient retail functions. The Woolworths Group has outlined several goals for sustainability, including activating ethical partnerships, reducing food waste and carbon emissions, practicing responsible stewardship of natural resources, and increasing healthier choices for customers. 	<ul style="list-style-type: none"> <i>City Plan 2036: Local strategic planning statement</i> (City of Sydney, 2020) <i>A City for All: Towards a socially just and resilient Sydney</i> (City of Sydney, 2019) <i>Retail Action Plan</i> (City of Sydney, 2013) <i>Sustainability Plan 2025</i> (Woolworths Group, 2020)

Source: *Ethos Urban*

5.0 Local social context

5.1 Introduction and key findings

This section provides an overview of the site and its current and forecast social context. It analyses the social characteristics of the community within the identified study area to better understand the potential impacts of the project.

Key community characteristics – primary study area/ trade area

- The population of the primary study area/ trade area (see **Figure 5** over page) is forecast to continue to grow steadily, increasing from 34,800 residents in 2021 to 40,700 in 2026, and 55,400 in 2036.
- Residents have lower annual median household income levels when compared to Greater Sydney.
- There is a large proportion of middle aged persons with children residing in the study area.
- The majority of residents in the study area were born overseas, with a strong representation of residents from China, England, and New Zealand.
- There is a small proportion of residents who identify as being of Aboriginal and/or Torres Strait Islander descent.
- The primary household composition is family households, and there is a small proportion of lone person households, in contrast to Greater Sydney.
- Apartments, flats, and units are the primary housing type in the study area, with a smaller share semi-detached and detached dwellings compared to Greater Sydney.
- A large portion of households are renting.
- There is a moderate student population within the study area, particularly of students attending university or another tertiary institution.
- There is a high proportion of residents requiring assistance in comparison to Greater Sydney.

5.2 Study area definition

For the purposes of this social assessment, the primary and secondary study areas have been chosen with a focus on local social impacts.

The overall study area aligns with the Total Trade Area (TTA) applied in the economic assessment of the proposal (submitted under separate cover), given the trade area's significance to the retail uses proposed and associated community needs or impacts.

The study area/ trade area broadly includes residents living within a catchment of approximately 500m of the subject site (approximately 10-15 mins walk) who are considered most relevant to this assessment. Population profiles that underpin the social assessment have been produced on this basis.

Primary and secondary study area/s (Trade Areas) have been defined using SA1 ABS Census collection district boundaries that best align with this chosen geographic area. A map illustrating these areas is shown at **Figure 5** over page.

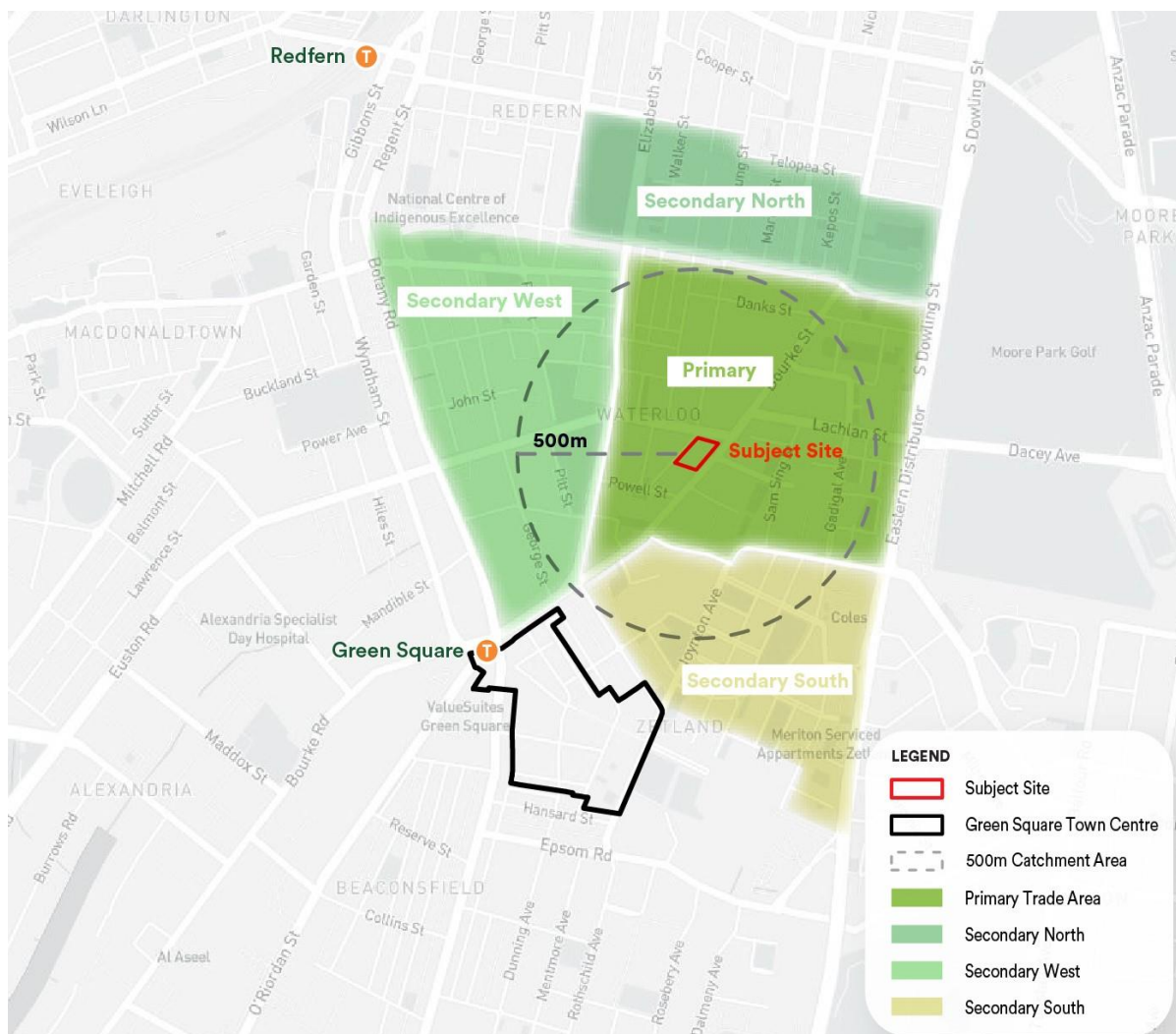


Figure 6 Study area encompassing primary and secondary local retail trade areas

Source: Ethos Urban

5.3 Current population profile

The following overview of the demographic profile of residents living in the study area compared to Greater Sydney benchmarks is based on 2016 ABS Census of Population and Housing data. Full data is provided in **Table 3** at **Appendix A**.

- **Population:** The total study area has an estimated population of 34,800 residents, as of 2021.
- **Age profile:** The median age of residents is 31, which represents a slightly younger population profile than Greater Sydney (36). This age profile is largely driven by the significant share of 25-34-year olds residing within the study area.

This median is not reflective of the diversity between each secondary study area, with median ages ranging from 28 in Secondary South, to 43 in Secondary West, and 48 in Secondary North.

- **Household Income:** Study area residents had a median annual household income of \$82,440, some 10.6% lower than the Greater Sydney median of \$92,200.

This median is not reflective of the diversity between each secondary study area or trade area, with median incomes ranging from \$25,490 in Secondary West, to \$45,150 in Secondary North, and \$97,850 in Secondary South.

- **Aboriginal and or Torres Strait Islander residents:** 2.2% of residents in the overall study area identify as being of Aboriginal and/or Torres Strait Islander descent, considerably higher than the Greater Sydney benchmark for the share of Aboriginal and/or Torres Strait Islander persons of 1.4%.
- **Household composition:** Family households are the primary household type within the TTA at 46.9%. However, this is significantly lower than the Greater Sydney benchmark for family households of 73.7%. As such, there is a high representation of lone person households (36.2%) and group households (16.8%) within the study area, which is significantly higher than the Greater Sydney benchmark for both of these household types (21.7% and 4.6%).
- **Dwelling type:** Flats, units and apartments contribute to 90.4% of the total dwelling structure within the study area. This is dramatically higher than the Greater Sydney benchmark for this dwelling type of 28.2%. As such, there is a low representation of semi-detached dwellings (9.4%) and separate dwellings (0.2%) within the study area, which is significantly lower than the Greater Sydney benchmark for these dwelling types (14.0% and 57.2%).
- **Tenure type:** The majority (70.5%) of residents in the study area are currently renting. This is a significantly higher proportion than the Greater Sydney benchmark of 35.1%. Accordingly, the share of residents in the overall study area who own outright (8.1%) and own with a mortgage (20.7%) is marginally lower than the Greater Sydney benchmark for these tenure types (30.0% and 34.2%).
- **Educational attainment:** The study area has a moderate presence of students, where 24.5% of the total resident population is attending formal education. Of students attending education, 61.3% are studying at a university or tertiary institution. Residents in the study area are also highly educated, best demonstrated by the 46.3% of residents that hold a bachelor's degree, and the 20.6% that have post-graduate qualifications.
- **Need for assistance:** The study area has a high share of residents requiring assistance (8.2%) by comparison to the Greater Sydney benchmark of 4.9%.
- **Cultural and linguistic diversity:** Over 45% of residents in the study area are overseas born (47.7%), while 12.8% are overseas born but from major English-speaking countries. Residents have a low rate of households which speak English only at home (29.1%) in comparison to the Greater Sydney benchmark of 62.5%, demonstrating the cultural and linguistic diversity of the study area. There is a strong representation of residents from China (20.5%), England (4.6%), and New Zealand (2.8%).

5.4 Forecast population

Population projections for the purposes of this assessment have been re-based to the year 2021, with forecast population estimates analysed using data from ABS Population Estimates and ABS Building Approvals, with consideration also given to future development activity in the study area.

Population estimates show that there are 34,800 residents living within the study area in 2021, and increase of +6,400 residents since 2016 at a rate of +4.1% per annum.

Detailed forecasts are shown at **Table 2 at Appendix A**.

5.5 Local social infrastructure context

A review of existing social infrastructure within walking distance of the site has been undertaken to inform this social assessment, through establishing a baseline of infrastructure networks.

This audit is focused on local social infrastructure networks within approximately 20mins walk of the subject site. This is given the focus of the Planning Proposal on the creation of a local neighbourhood centre, providing retail amenities and social infrastructure designed to serve a localised population (refer to study area/ local trade area catchment shown at **Figure 7** over page).

The following social infrastructure has been identified and is shown in the map at **Figure 7** over page:

- **Open space:** There are several open spaces within walking distance of the site, including Redfern Oval, The Bakery Park, Crystal Park, Short Street Reserve, Tote Park, and Vescey Reserve.
- **Recreational facilities:** There are two recreational facilities located within walking distance of the site: Redfern Park Basketball Courts and the Gunyama Park Aquatic and Recreation Centre.
- **Health and aged care facilities:** There are a number of health and aged care facilities within walking distance of the site, including Catholic Healthcare Wellness Centre, Frederic House, Dr. Mary Wong, Inner West Aged Care Services, and Dr. Holly Inglis.
- **Community facilities:** There are a number of community facilities within walking distance of the site, including Green Square Library, Waterloo Library, Weave Youth & Community Services, The Green Square Centre, Inner Voice Sydney, and Counterpoint Community Services.
- **Educational facilities:** There are five educational facilities located within walking distance of the site: Sydney Film School, Our Lady of Mt Carmel Catholic Primary School, Mandarin Mandarin Bilingual Centre, Yudi Gunyi School, and Taylors High School.
- **Childcare facilities:** There are five childcare facilities located within walking distance of the site: Greenwood Waterloo, Moore Park Gardens Child Care, Moore Park Children's Early Learning Centre, Counterpoints Poets Corner Preschool, and KU James Cahill Preschool.
- **Places of worship:** There are six places of worship located within walking distance of the site, including Grace City Church, South Sydney Uniting Church, Waterloo Congregational Church, South Sydney Anglican Church, Hillsong Church Waterloo Campus, and Zetland Mosque.

Social infrastructure in the Green Square Town Centre

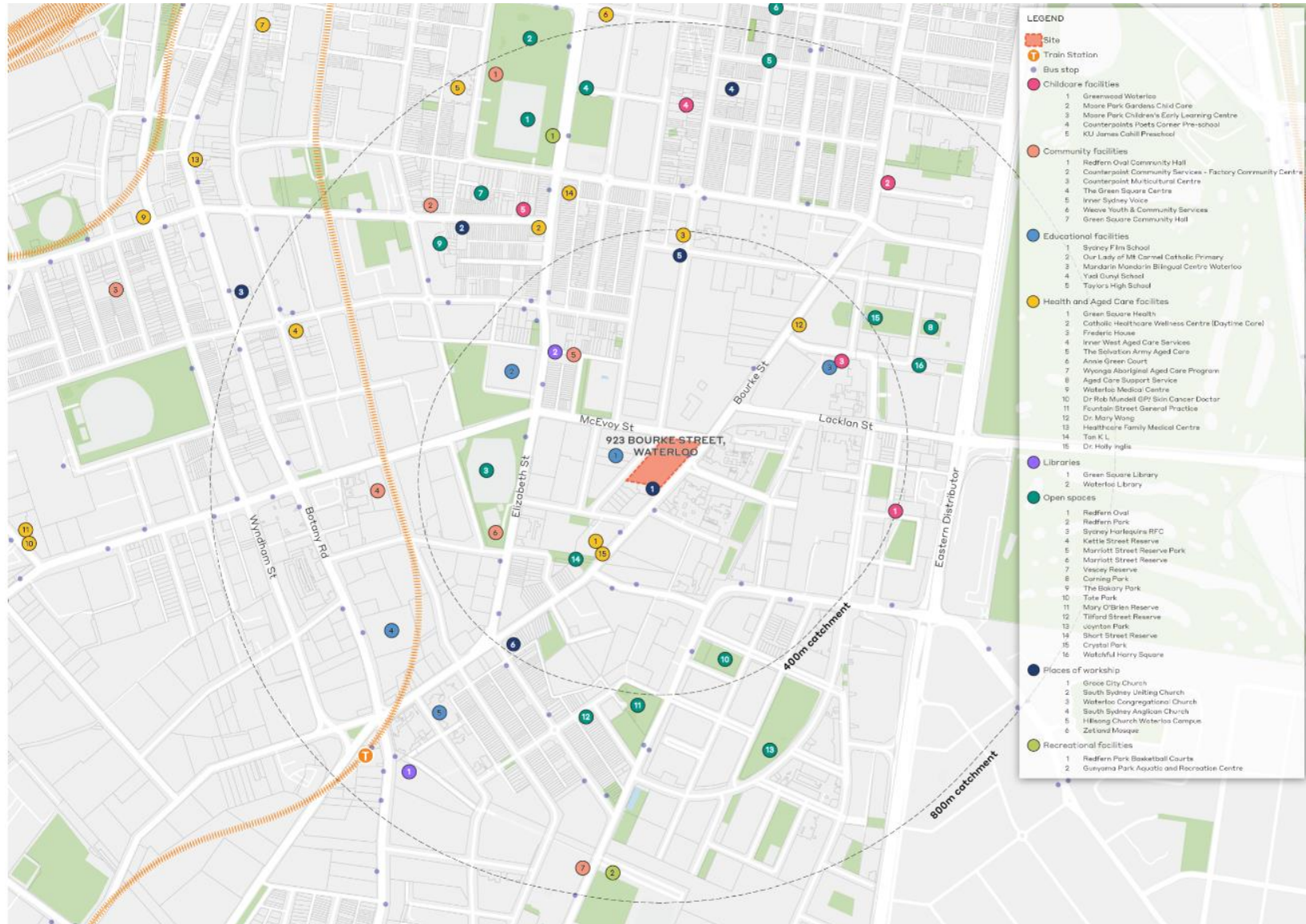
A broad range of district scale social infrastructure has been delivered in Green Square Town Centre and broader urban renewal area in recent years, which will also be available to future residents and workers on the subject site, beyond the study area.

This includes the landmark Green Square library, which provides a range of community spaces and amenities; the Joynton Avenue Creative Centre, which provides studios and spaces for creative and cultural participation, the Gunyama Park Aquatic and Leisure Centre, providing a 50m outdoor pool along with indoor pool and other facilities. A range of parks and landscaped open spaces are also provided, including the Drying Green Park, and Matron Ruby Grant Park.

5.6 Public transport and access

The future development will be highly accessible by public transport. The new Waterloo Metro Station (approximately 800m from the site) is due to open in 2024. This will be serviced by Sydney Metro City & Southwest lines, and will provide a 2-minute service to Central, 6-minute service to Martin Place, and an 8-minute service to Barangaroo.

The site is currently located approximately 900m from the closest train station, Green Square, which is serviced by the T8 Airport and South lines. The site is also accessible via a number of bus routes including 301 Eastgardens to Redfern via Mascot; 303 Sans Souci to Redfern via Mascot; 304 Rosebery to City Circular Quay via Zetland; 320 Mascot to Gore Hill.



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Figure 7 Social infrastructure context

Source: Ethos Urban

6.0 Social issues and trends

The following section highlights key social issues and trends of relevance to the Planning Proposal and indicate reference scheme to which it responds.

6.1 Urban renewal driving population change

6.1.1 Transformation of Green Square

The Green Square Urban Renewal Area (GSURA) is one of Australia's fastest growing neighbourhoods. The transformation of the 292Ha industrial area is undergoing ongoing transformation into a vibrant mixed-use community close to the airport and Sydney CBD, bringing over 30,000 new residential dwellings and 20,000 new jobs.

The Green Square town centre achieves a Six Star Green Star Communities rating, the highest possible. Environmental sustainability forms a core of the project, with tree-lined streets, raingardens, and stormwater recycling for flushing toilets, watering gardens, and cooling systems.

The area is designed for walking and cycling, with pedestrian-only zones, separated cycleways and low-speed streets. A range of social infrastructure has also been delivered by the City of Sydney to support the social sustainability of the growing community. Adaptive reuse of historic buildings, along with heritage interpretation and public art strategies have also helped shape the future character and identity of the area.^{11 12} Recent public and private investment in residential commercial development and social infrastructure will continue to drive significant population growth in the area.

The population of the urban renewal area has doubled over the past eight years, growing from about 16,000 in 2012 to an estimated 34,000 in 2020.¹³ The population has been forecast to further double and reach about 74,000 by 2041.¹⁴ This level of growth is notably faster than the City of Sydney average, and will place pressure on existing social infrastructure and increase demand for the delivery of new facilities.

The City of Sydney LGA plays a unique housing role in the metropolitan context, as it attracts a large number of overseas migrants and migrants from regional New South Wales and interstate, primarily being young people studying or moving to Sydney for lifestyle and/or employment reasons. This results in much of the population migrating to the City being young adults in their late teens and 20s. Reflecting these trends, the population of the town centre is a young and multicultural community.

This young, highly educated and affluent new community growing in the Green Square Urban Renewal area is in contrast to the neighbouring communities, such as the well-established Waterloo neighbourhood where majority of the homes are social housing dwellings and the median age of residents is notably higher than the Greater Sydney average.

6.1.2 Redevelopment of the Waterloo State Significant Precinct

The Waterloo State Significant Precinct, on the perimeter of the 800m study area, is set to undergo large-scale urban renewal in the delivery of a new mixed tenure, mixed use community over the next 20 years. The 20Ha precinct will include the development of the Waterloo Metro Quarter and the redevelopment of Waterloo Estate.¹⁵

Following the announcement of the new Waterloo Metro Station, the Waterloo Estate was identified by the NSW Government's Communities Plus program as a key site to deliver new social and affordable housing alongside private market housing over the next 15-20 years.¹⁶

¹¹ City of Sydney 2021, *Green Square*, <https://www.cityofsydney.nsw.gov.au/green-square>

¹² City of Sydney website, <https://news.cityofsydney.nsw.gov.au/articles/6-stars-for-green-square-town-centre>

¹³ Australian Bureau of Statistics, *Regional Population Growth, Australia (3218.0)*. Compiled and presented by .id profile.id.com.au/sydney/population-estimate?WebID=340

¹⁴ Forecast .id Population and household forecasts, 2016 to 2041, prepared by .id, February 2019. forecast.id.com.au/sydney/population-summary?OverlayID=20

¹⁵ NSW DPIE 2020, *Waterloo State Significant Precinct*, <https://www.planning.nsw.gov.au/Plans-for-your-area/State-Significant-Precincts/Waterloo>

¹⁶ NSW DPIE 2021, *Waterloo Estate*, <https://www.planning.nsw.gov.au/Plans-for-your-area/State-Significant-Precincts/Waterloo/Waterloo-Estate>

The development of Waterloo South is expected to catalyse significant change for the community in terms of age, socio-economic status, and cultural diversity. Waterloo South currently contains a high proportion of residents over 50 years of age (68%), lone person households (73%),¹⁷ and residents which depend highly upon Government income support (79%).

Significant redevelopment of Waterloo East has resulted in substantial demographic change, including the attraction of tertiary students, Culturally and Linguistically Diverse (CALD) residents, migrant workers, professionals, young couples, and young families. Consequently, only 8% of Waterloo East's population are over 60 years of age, 64% of households are couples without children, and there are low levels of socio-economic disadvantage. There is also an increased demand for childcare facilities, schools, recreational facilities, and other social infrastructure. This demographic trend is likely to continue following the redevelopment of surrounding areas.¹⁸

6.2 Importance of 'third places' in community building

'Third places' are places where people spend time between home ('first' place) and work ('second' place). The term, coined by US sociologist Ray Oldenburg, defines locations where people exchange ideas, have a good time, and build relationships. The most effective third places for building community are physical places where people can easily and routinely connect with each other, such as parks, recreation centres, churches, hairdressers, gyms, and local cafes. Third places play a critical role in building local social connections, leading to improved social cohesion over time. They are particularly important in areas undergoing significant population growth and change.

Recent research into the social connectedness of apartment residents and neighbourhoods in Sydney and Melbourne highlights the central importance of third places accessible for people of all incomes, in particularly parks, libraries and community centres. 'Soft' infrastructure, including community engagement programs and community-led activities, was also found to be important.¹⁹

Wellbeing studies point to the need for human connection to support good mental health and sense of purpose,²⁰ however community building takes time. This is a key challenge in urban renewal areas with high numbers of recent residents. Only 44% of City of Sydney residents surveyed in 2018 felt being part of the community in their local area,²¹ an issue that is more pronounced in the GSURA, where only 26% of surveyed residents felt a part of the community in 2020. The vast majority (86%) of new residents who have lived in the area for less than one year expressed a desire for more social interaction with others in the area. Private renters and younger people in particular desire more local social connection,²² indicating the potential to support stronger community connections through third spaces and programs at the local neighbourhood level.

6.3 Benefits of walkable, mixed-use neighbourhoods

Co-locating housing, employment, social infrastructure, retail, public transport and daily living needs within dense, mixed-use precincts supports urban activation and amenity. Clustering destinations, such as housing, shops, schools, libraries, cafes, medical centres and so on, makes it more convenient for residents to access a variety of needs within one location. Mixed-use precincts encourage walking and active transport, supports the viability of local retail and social infrastructure, as well as increased activity on the street and improved perceptions of safety.

The co-location of housing, social infrastructure, and essential services has the potential to significantly decrease car dependency and encourage walkability. Walkability can have substantial effects on the health and wellbeing of populations:

"People who live in a pedestrian-friendly designed environment participate much more in social life and have greater confidence in their environment. That proved a significant gain in 'social capital' and thus a better quality of life... Against this backdrop walkability is understood as a comprehensive approach for a liveable sustainable city and does not only mean walk-friendliness".²³

¹⁷ Elton Consulting 2020, 'Waterloo South Social Sustainability Report'.

¹⁸ GHD 2020, 'Social Baseline Report – Waterloo'.

¹⁹ AHURI (2020). Improving outcomes for apartment residents and neighbourhoods

²⁰ Greater Sydney's Social Capital (Cred for Greater Sydney Commission, 2017)

²¹ City of Sydney website, news.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall

²² MyPlace Green Square Community Survey 2020 (City Futures Research Centre, UNSW Sydney, 2020) www.cityfutures.net.au

²³ Tran, M. 2021, 'Healthy cities – walkability as a component of health-promoting urban planning and design', *Journal of Sustainable Urbanization Planning and Process*, vol. 1, no. 1.

6.4 Inner city social sustainability challenges

6.4.1 Declining housing affordability and its impacts

Safe and secure housing is a central component of productive, healthy, and meaningful lives, and a principle social determinant of health and wellbeing.²⁴ The cost of housing form large ongoing expenses in household budgets, and it has become a key issue impacting quality of life for many residents of the City of Sydney local area.

The City of Sydney's Local Housing Strategy identifies that more than 15,000 of City's households are experiencing rental stress (based on ABS Census 2016 data). The Community Wellbeing Survey undertaken by City in 2018 revealed that about half of residents were unhappy with the cost of accommodation in their neighbourhood. Students, young people and people living with disabilities were impacted more often. Home buying and rent prices were the top reasons mentioned for residents planning to move out of the area.²⁵

The City of Sydney's Community Strategic Plan targets 15% of housing stock to be social and affordable housing, to support low to moderate income earners.²⁶ Supply is far short of these goals, with the City's 2021 Housing Audit identifying 9,705 social (including public) housing dwellings, and 1,213 affordable rental housing dwellings of a total of 121,725 private dwellings in the LGA.

The City of Sydney's Housing or All (City of Sydney Local Housing Strategy) requires a substantial increase in the number of affordable housing dwellings, a critical infrastructure necessary to support a diverse and well-functioning city. The inability to access affordable housing pushes lower income households to the city fringes.²⁷

6.4.2 Cultural infrastructure to support Sydney's social life and creative economy

A decline in affordable cultural infrastructure in inner Sydney is adversely affecting opportunities for creative and cultural expression. According to the City of Sydney's 2020 Cultural Infrastructure Study, over a ten-year period (2007-2017) there has been a significant reduction in space available and affordable for creative industries within the LGA, with a total estimated decline of more than 100,000sqm.

The study finds that while opportunities to access internationally renowned art and events are widely available, the issue of affordable cultural 'makers' spaces' is adversely affecting opportunities to produce cultural work, with a risk to Sydney's cultural life.²⁸

It is a Council priority to increase accessibility to free or low-cost creative participation opportunities such as theatre workshops and art classes, and to increase the availability of affordable workspace for creative and cultural uses. The City of Sydney is committed to supporting the financial sustainability of this sector by supporting training, mentorships, business development, and opportunities for partnerships.

Critically, as affordable floorspace becomes extremely limited in inner-city areas, the cultural floorspace is identified a high priority for new social infrastructure provision.

6.4.3 Addressing rising rates of food insecurity

The City's 2018 Community Wellbeing Survey identified that cost of accommodation has in more severe cases led to food insecurity, where residents ran out of food, and could not afford to buy more. Food insecurity is a rapidly growing issue in the City of Sydney – up to 17,000 residents were classified as 'food insecure'²⁹. It is understood that food insecurity in Sydney LGA has been further exacerbated through the Covid-19 pandemic.

In order to combat this issue, the City of Sydney is supportive of a number of independent businesses and social enterprises which are working to reduce food insecurity in the LGA. Local restaurants have collaborated with community services and charities to deliver meals to those in need, while enterprises such as OzHarvest and Viral

²⁴ Baker, Lester, Bentley & Beer (2016) Poor housing quality: Prevalence and health effects, Journal of Prevention & Intervention in the Community

²⁵ City of Sydney (2019), Majority of City residents satisfied with their life overall, news.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall

²⁶ City of Sydney (2017) Sustainable Sydney 2030, Community Strategic Plan 2017– 2021

²⁷ City of Sydney (2020) Housing for All Local Housing Strategy

²⁸ City of Sydney Cultural Infrastructure Study, 2020

²⁹ SBS 2018, 17,000 people in the City of Sydney can't afford enough food, www.sbs.com.au/food/article/2018/05/25/17000-people-city-sydney-cant-afford-enough-food

Kindness deliver fresh produce and pantry staples to vulnerable community members.³⁰ It is a City of Sydney priority to:

“Collaborate with local businesses, government agencies and not-for-profit organisations to address food insecurity, including through initiatives that address entrenched social and economic disadvantage; increase the affordability and accessibility of healthy and nutritious food, and provide nutrition education for the community.”³¹

An example of this includes the successful FoodLab Sydney program, run in partnership of City of Sydney and Sydney University, that sought to minimise food insecurity in the City of Sydney area and simultaneously generating broader flow on benefits to community wellbeing.

The FoodLab model offers a three-month training program for approximately 20 people per year, to equip them with the tools needed to create a successful and innovative food business in Sydney.³² The recently completed three-year pilot project demonstrated that such model is highly effective in providing support for starting business, education, urban food systems, and flow on opportunities for community wealth building.

6.5 Changing consumer preferences for supermarkets

While approximately 75% of fresh food and groceries purchased Australia-wide are from supermarkets, the pace of consumer lifestyles and flexible work and life arrangements has led to more diverse consumer preferences when it comes to supermarket shopping. Customer research, led by Woolworths Group, indicates that consumers increasingly prefer supermarkets that enable or promote:

- **Walkability and accessibility:** Consumers, particularly those living in dense urban environments, prefer to shop locally, at facilities that are easily accessible by walking or public transport, and where on-site parking is readily available.
- **Shopping as an experience:** Supermarkets are increasingly responding to consumer demand for a better retail experience through an increased range of products, overseas brands and high-quality foods including ready-made meals. Supermarkets are also looking to differentiate themselves by providing better experiences and offers that can attract consumers in highly competitive retail markets.
- **Broad range of products:** Consumers seek a broad range of products, at various levels of price and quality from a range of sources that can cater to a variety of tastes, cultural and ethnic preferences.
- **Online shopping options:** Consumers continue to embrace online shopping. This is also seen in trends such as ‘direct to boot’ where a consumer can order online and pick up at the store or expect delivery within a short time. While still a relatively small share of supermarket sales, online shopping saw a boost during the Covid19 pandemic, and is growing rapidly.
- **Extended hours/ 24/7 shopping:** Working conditions and lifestyles have changed – consumers want the ability to be able to shop at times that are suitable and convenient for them.

To meet these customer preferences, contemporary full-line supermarkets offer a broader range of products and demonstrate features such as ‘direct to boot’ – in-store pick-up shopping and express delivery. They promote sustainable design and encourage sustainable practices – new supermarkets have higher levels of energy efficiency, and lower levels of wastage including reduced packaging and plastics.

Many new supermarkets also include a number of sustainability and recycling initiatives aimed at assisting households in becoming more sustainable, providing households with instore recycling and waste/ food waste recycling and composting programs.

Supermarkets can encourage walkability and active modes of transport by providing local convenience retail, limiting the need for consumers to take multiple trips to meet household grocery needs. This is particularly important in areas of high density residential development.³³

³⁰ City of Sydney 2020, How our communities work together for food relief, <https://news.cityofsydney.nsw.gov.au/articles/how-the-community-has-worked-together-so-no-one-goes-without-a-meal>

³¹ City of Sydney 2018, ‘A City for All: Towards a socially just and resilient Sydney’.

³² FoodLab Sydney n.d., The Program, <https://foodlabsydney.com/food-business-program>

³³ Ethos Urban 2020, Green Square Village Retail Needs Assessment

An example of this contemporary supermarket design approach is the Brickworks Burwood, Victoria (see **Figure 8** over page). Designed by NH Architects with Russel & George, Burwood Brickworks aims to be the one of most sustainable shopping centres in the world. The building has a 2,000sqm urban rooftop farm, uses renewable energy to power the centre, and has integrated compost and water recycling systems.³⁴



Figure 8 Contemporary supermarket architecture – Brickworks, Burwood VIC

Source: Bates Smart

7.0 Community and stakeholder perspectives

This section provides an overview of community perspectives with a bearing on the project. The information is drawn from consultation undertaken on the proposal specifically, along with issues identified through broader City of Sydney community consultations.

Key findings

- Recent City of Sydney community engagements indicate that people have moved to the inner city for its high level of including access to their workplace or place of study, public transport options, parks and greenery, and places to socialise. Green Square residents particularly value proximity to the CBD and convenience of the location. People are generally happy living in the area and rate their standard of living highly.
- Overall, City of Sydney community aspirations focus on a quality liveable environment – people want a city that is green with trees and plants, has quality public spaces, is safe, and has a range of housing choices that are affordable. People want an environmentally sustainable and resilient city, that is also friendly, lively and creative.
- Green Square residents use a variety of services and facilities in the area, such as local cafes and parks. Availability of community facilities in the area is appreciated as an important benefit of living there.
- Local streets and shops are seen as important places for socialising. Residents aspire to a greater variety of cafes, restaurants and bars, and the availability of evening activities in the area, especially younger people. A wider range and availability of retail outlets has been raised as an aspiration by residents.
- Key concerns of residents revolve around unaffordability of housing in the LGA, overdevelopment and overcrowding, and infrastructure not meeting the demands of the growing population. People want to be able to get to where they need to more easily. Residents desire quality integrated and active transport networks; residents in the Waterloo locality have particularly raised a desire for more localised retail and amenities.
- Community engagement undertaken for the proposal in 2021 (outcomes report submitted separately) indicates that the local community generally supports the plans for this site. Community members expressed a strong desire for a one-stop-shop destination with support for a full-line supermarket. The three most important

³⁴ Bates Smart (2020)

community benefits were seen to be: a premium food and retail destination close to home; a high-quality plaza for community gatherings, and sustainability: targeting a Five Star Green Star rating.

7.1 Community and stakeholder engagement to inform this proposal

Woolworths Group engaged JOC Consulting to undertake targeted community consultation, in order to identify community aspirations for the project. This section summarises the engagement activities and outcomes, as described in the Engagement Outcomes Report (JOC Consulting, 2021).

7.1.1 Purpose and approach

The purpose of engagement was to inform and consult the community and stakeholders during the early planning stage. The specific objectives of this engagement were to:

- Inform the community about the project
- Invite feedback on two concept designs
- Invite feedback on proposed project priorities, and
- Provide communications and engagement channels.

Meaningful and genuine feedback was received through a range of channels.

Key stakeholders consulted included:

- City of Sydney Council – Councillors and Planning Department representatives
- Local First Nations Australians organisations and representatives
- Local community groups, creative and social enterprise groups
- Surrounding community (residents and local businesses) within 800m radius from the site

The following engagement tools and activities were used through the process, undertaken during September – October 2021:

- A dedicated project website: www.bourkeandyoung.com.au
- A project flyer distributed within 800m radius from the site, with information on the website, an online survey and two webinars
- A letter from the Woolworths' project team distributed to adjoining residents and businesses
- An introductory project email to several community and cultural representatives
- An online survey was created to seek feedback on the two concept plans, project priorities and inviting general feedback. Available in English and in Mandarin, the survey was most popular channel for engagement and yielded 192 responses
- Two 60minute Zoom webinars for community and local stakeholders, presenting project vision, and responding to questions; 47 people participated
- Online briefings with community, cultural and social enterprise representatives, to understand stakeholder views and identify potential future partnership opportunities regarding the dedicated community floorspace use on the site
- Stakeholder calls to local First Nations Australians organisations and representatives
- WeChat group was created to engage with local Chinese community within Waterloo
- Hotline, and a project email address for community to ask questions and provide feedback
- Google advertisement to promote the project and invite community feedback

7.1.2 Engagement outcomes

Feedback received from community members and stakeholders is summarised as follows:

- 65% of participants agreed that the proposal would benefit the current and future community
 - 17% disagreed – primarily as they felt there are enough supermarkets within walking distance
 - 14% were unsure – felt that full-line supermarket was needed, but expressed concern regarding potential traffic impacts, or did not support residential apartments.
- Creating a community focused space was a priority for most participants. The three most important community benefits were seen to be:
 - A premium food and retail destination close to home
 - A high quality plaza for community gatherings
 - Targeting a Five Star Green Star sustainability rating for key components of the development.
- There is a strong desire for a one-stop-shop destination with support for a Woolworths supermarket at this site.
- Participants want to see a development that is creative, lively, has it's own unique character, while contributing to the atmosphere of Waterloo.
- Strong support to retain existing trees and vegetation on the site, as part of landscape plans for the site.
- The development needs to consider community needs, while minimising impacts through sustainable and innovative design.
- Community also supported open spaces for community to socialise, and pockets of green to relax in. Community also proposed further ideas, such as community gardens, markets, play areas, art galleries, diverse food options, training hub, promoting First Nations culture and history, post office, toilets, bike storage, universally accessible spaces.

7.2 Outcomes of broader LGA-wide consultation and research undertaken by City of Sydney

This assessment draws on community perspectives expressed through a range of community engagements activities by the City of Sydney in recent years.

MyPlace Green Square Community Survey 2020 (City Futures Research Centre, UNSW Sydney, 2020)

City of Sydney has commissioned the City Futures Research Centre, UNSW Sydney to deliver a Green Square Community Survey program that tracks the community sentiment in the urban renewal area over time. Surveys have been undertaken in 2014, 2017 and 2020.³⁵

Key findings from the 2020 survey are as follows:

- Majority (90%) of residents find the area a good place to live. They value proximity to CBD and convenience of the location. Key community concerns are related to the danger of overdevelopment and density in the area.
- Public transport and walking are the most common ways of getting around, however 40% drive to shops or recreational activities (it should be noted that the number of supermarkets and recreational facilities in the area in 2020 were still limited). At the same time, many people are concerned about traffic and parking in the area.
- Residents use a variety of services and facilities in the area, such as local cafes and parks. Community centres were used only by 10%, however are notably more important among vulnerable groups (e.g. used by 19% of unemployed respondents).
- Measures of community cohesion are low, reflective of the relatively new community, however many recent residents would like more involvement with others in the area, suggesting that there is room to develop community connections at the neighbourhood level. Length of residence in the area had an effect on the feelings of belonging and increased notably with length of residence.

³⁵ MyPlace Green Square Community Survey 2020 (City Futures Research Centre, UNSW Sydney, 2020) www.cityfutures.net.au

- Local streets and shops are important places for people to socialise. However, residents would like further opportunities and places for socialising.
- Perceived barriers to socialising and local activities relate primarily to time constraints, and for some people to difficulty finding information or lack of interest. Electronic channels (social media, emails) and public or building notice boards are preferred ways to promote social opportunities.

City of Sydney Community Wellbeing Survey 2018

City of Sydney regularly undertakes a survey among its residents to understand community perceptions on social, cultural and environmental factors affecting quality of life in the local government area. Wellbeing Survey data collection has been undertaken in 2011, 2015 and 2018.^{36 37} Results of the 2020 survey indicate:

- Residents have typically chosen to move to the LGA to be close to transport (78%), workplace or study (70%), parks and greenery (63%) and places to socialise (64%).
- While residents are generally active in enjoying cultural activities, 85% reported barriers to community or cultural participation. Lack of time, cost and perceived shortage of suitable or interesting activities were mentioned most often.
- Social cohesion indicators point to a disconnect in aspirations and reality of the community – whilst 90% of City residents appreciate a diverse society, 95% are willing to help neighbours and levels of trust are high, only half have face to face contact with other people in their area at least weekly and about as many are not confident that neighbourly help is available when required. Social isolation and barriers to participate in public life are experienced more often by people living with disability, culturally and linguistically diverse people and younger age groups.
- Cost of housing is a concern for many – while 81% of the LGA residents are happy with their standard of living, around half are unsatisfied with the cost of accommodation in their neighbourhood.

Community engagement to inform the Sydney 2050 vision

Broad ranging community engagement activities have been undertaken by the City of Sydney during 2018-20 to inform the development of the Community Strategic Plan and vision for Sydney in 2050.³⁸

Community perspectives and priorities identified are as follows:

- A city for people. People want a city that is green with trees and plants, has quality public spaces and different types of housing that is affordable. It is a socially supportive community that is safe, and inclusive.
- A city that moves. People want to be using public transport, walking and bikes to move around. There is a reduction of cars, where streets and public spaces are easily accessible to people. The city is welcoming, and people can readily get to where they need to go.
- An environmentally responsive city. People overwhelmingly want a response to climate change. They want a city with sustainable waste management and use of resources. People want to see a reduction in emissions, greater recycling and reusing of products and changes to how we use our city to reduce our impact on the environment.
- A lively, cultural and creative city. People want a vibrant city, weaving its culture, heritage, entertainment and bold ideas through the workings of the city. The city has diverse shopping and entertainment options and a lively nightlife that includes many options. Locals and visitors gather for events and cultural experiences using public spaces.
- A city with a future focused economy. People want a city that is supported by digital infrastructure that sustains the creation of new jobs and allows businesses to respond to changing customer needs. People are optimistic about the opportunities that will be available in terms of education, jobs, innovation and the economy

³⁶ City of Sydney website, [news.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall](https://www.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall)

³⁷ City of Sydney Community Wellbeing Indicators Report 2019 (City of Sydney Strategy and Urban Analytics Unit, 2019)

³⁸ City of Sydney website, <https://www.cityofsydney.nsw.gov.au/vision-setting/planning-sydney-2050-what-we-heard>

8.0 Community priorities and opportunities for the project

8.1 Introduction and approach

This section identifies key opportunities and priorities for the proposed development of a mixed-use neighbourhood centre at 923-925 Bourke Street, Waterloo with regard to the sustainable growth and development of the locality. It draws on key findings from evidence presented in previous sections of this assessment.

8.2 Demand for a new mixed-use neighbourhood centre in Waterloo

8.2.1 Population growth driving demand for new amenities and services

- **Forecast population growth in close proximity to the site:** The population surrounding the site is forecasted to maintain steady population growth, increasing by 20,600 between 2021 and 2036. This combined with rapid residential development in the surrounding areas of Green Square and Waterloo will drive demand for additional social infrastructure, retail, and other services.
- **Needs of highly diverse and distinct communities:** the study area is socio-economically diverse, with households on a range of incomes – including very low incomes – residing in the locality. The population of the study area is also highly culturally and linguistically diverse – only 29% of residents in the study area speak English at home and 48% of residents were born overseas, compared with 63% and 31% respectively in Greater Sydney. This may indicate demand for services and space that considers and supports cultural diverse cultural activities and opportunities for expression.
- **Transient communities and need for spaces to build community connections and cohesion:** Across Green Square, there is a high proportion of renters (56.1%), many new arrivals to Australia without existing networks to draw on (50.6% of residents born overseas and living in Green Square arrived in Australia in the last five years). The majority (71%) of dwellings in the study area are rented, compared with 35% of dwellings in Greater Sydney.

Community surveys (e.g. Community Wellbeing Survey 2018, Green Square My Place Local Community Survey 2020) suggest that high transience of the community, especially in the case of the relatively new Green Square Urban Renewal Area community, can manifest in low levels of community cohesion. At the same time many residents of Green Square would like more interactions with the other people who live and work in Green Square. This suggests demand for community spaces where people can interact with each other and build connection. Supermarkets, other key retail spaces and ‘third places’ play an important role in building local social capital.

- **High density community, indicating demand for open and social spaces outside the home:** The majority of dwellings in the study area are apartments (90.4%, compared with the Greater Sydney average of 28%). The population density of the study area is also likely to increase as the area continues to develop, which will drive ongoing demand for social infrastructure and amenities, including open space, community infrastructure and retail.

8.2.2 Appropriateness of the subject site for a new neighbourhood centre

The site is prominently located on the corner of McEvoy and Bourke Streets. It is in an area presently experiencing significant change through urban renewal projects, which are delivering a number of new high-density residential and mixed-use developments, along with commercial development along Archibald and Bourke Street.

The site will particularly benefit from the planned new Waterloo Metro Station to be completed in 2024 as part of the Sydney Metro Northwest Project (1.2km north-east), already has good access to a number of frequent bus routes.

The site brings the potential to deliver a neighborhood centre that will serve a localised catchment and complement activities and amenities in the broader Green Square and Waterloo SSP renewal areas, adding to the diversity of uses in the broader area, and enhancing localised activity and vitality within Waterloo.

8.2.3 Strategic policy drivers for delivery of new infrastructure and amenities

The following strategic policy drivers are key to the proposed development:

Supporting community wellbeing across South Sydney, as the area continues to grow

- Rapid population growth is driving demand for additional social infrastructure to support this diverse, high-density community. Green Square has become “the strategic centre of South Sydney” (City of Sydney LSPS p.23). The population of Green Square Urban Renewal Area is forecast to increase from 44,535 in 2021 to 69,152 in 2036 (Forecast.id).
- This forecast population growth will drive demand for increased provision of social infrastructure across Green Square, to support the social sustainability and resilience of the community. It is a key priority of City of Sydney’s LSPS that community wellbeing be supported with social infrastructure (Priority 13, p.86), and that high quality and accessible social infrastructure provide opportunities for learning, celebrating culture and social connection.
- Green Square has been identified by the City of Sydney as a growth area for the retail sector. It is a Council priority to support the residents of Green Square and the southern areas of the city through the delivery of sufficient retail functions.
- The City of Sydney recognises that successful urban centres contain complementary facilities, services, and activities which support local needs and economic productivity. It is observed that “food and retail services activate the street during the day and night, while services and businesses on other levels contribute to the economic performance of the centre and attract people” (LSPS, pg. 114).
- The City of Sydney recognises the impact of socioeconomic inequality and its effect on the health of communities, particularly through access to healthy and affordable food. It is a Council priority to “increase the affordability and accessibility of healthy and nutritious food...” while providing “nutrition education for the community” (A City for All, pg. 43). This will be achieved through partnerships with other government agencies, local businesses, and not-for-profit organisations.

Supporting community cohesion and social sustainability

- The City of Sydney has identified that residents of the Green Square Urban Renewal Area desire a “community with which they feel connected” (LSPS, pg. 103).
- The vision for Green Square is underpinned by high amenity spaces, including quality communal space and public domain, a mix of uses and a supermarket, that support a range of social interactions.

Addressing the decline in affordable housing, workspaces and creative makers’ spaces

- The City of Sydney’s City Plan 2030, LSPS identifies that affordability issues have challenged liveability and productivity across the LGA. In 2016, 13.2% of households were in housing stress, and the decline in affordability challenges socio-economic diversity of the City by displacing households on lower incomes. The City forecasts that an additional 11,000 affordable rental housing and 2,000 social housing dwellings will be required to 2036 (LSPS, p.49).
- Lack of affordable workspaces also challenges opportunities for creative businesses and innovative start-ups to grow and thrive within the City of Sydney LGA. The lack of affordable and available work, rehearsal, studio and meeting spaces for professional art development and creative practice is identified as a key barrier to the development of the City’s cultural sector. In addition, the use of existing rehearsal spaces can be constrained by noise complaints, lack of storage space for equipment and creative archives (City of Sydney, Creative City Cultural Policy and Action Plan 2014-2024, p.59).
- City of Sydney strategies and policies identify demand for affordable rental housing and affordable creative spaces across the City to support the socio-economic diversity and creative ecosystem of the City. Improved access to affordable housing also has potential to support creative workers in the City, many of whom are on low or moderate incomes.

Strong demand for liveable, accessible public spaces with high amenity

- It is a priority of the City of Sydney’s A City for All strategy to create “a liveable city [which] supports high quality of life and wellbeing” (A City for All, pg. 27). Members of the community should have access to a diverse range of facilities and services within a vibrant local neighbourhood which supports their daily needs.
- It is the City’s goal to integrate Green Square into the fabric of the broader LGA, by creating an environment where residents have great access to open spaces, cultural and recreational facilities, active and public transport connections, activated public spaces, affordable housing, retail, employment opportunities and other daily living needs (Draft Green Square Infrastructure Strategy and Plan, 2015, p.3).

8.2.4 Community aspirations for increased amenity to support their lifestyles

- **City of Sydney community aspires for quality liveable environment.** People are generally happy living in the City area and rate their standard of living high. Green Square residents value proximity to CBD and convenience of the location. People want a city that is green with trees and plants, has quality public spaces, is safe, and has different types of housing that is affordable. People want an environmentally sustainable and resilient city, that is also friendly, lively and creative
- **Diversity and activation of streets:** Residents of the area value the degree of diversity in the area which is expressed through desire for retail, hospitality, and recreational offerings. Studies focussing on the Green Square area show that local streets and shops are important places for people to socialise, among others. Wider range and availability of shops has also been a highly cited suggestion for improving the area.

The availability of social infrastructure and activated places to socialise within walking distance of homes is also an attractive feature. Green Square residents use a variety of services and facilities in the area, such as local cafes and parks. Availability of community facilities in the area is appreciated, and community centres were important for vulnerable groups in particular.

- **Transient and time-poor community:** Renters contribute a high proportion of the area’s population, leading to a lack of community cohesion. Further, many residents are time-poor due to work and other commitments, minimising incentive to actively engage with the community and seek out social interaction with strangers.
- **Growing housing unaffordability:** Growing housing unaffordability in Sydney LGA continues to have a negative effect on communities in the area.
- **Desire for proximity to transport:** Residents of the area value proximity to public transport for their lifestyles, linking to high-quality social infrastructure, open spaces, essential services, and retail and hospitality offerings.
- **Local community supports the plans for this site:** There is a strong desire for a one-stop-shop destination with support for a full-line Woolworths supermarket at this site. The three most important community benefits were seen to be - A premium food and retail destination close to home, A high-quality plaza for community gatherings, Targeting a Five Star Green Star sustainability rating.

8.3 Identification of priorities and opportunities for the proposed development

Based on the review of a range of evidence summarised above, the following priorities and opportunities are identified for the Planning Proposal.

As noted above, a broad range community infrastructure and amenities are available within 800m (approx. 20 minutes’ walk) from the site, including key district scale community infrastructure in the Green Square Town Centre, outside the study area.

The priorities for community infrastructure and amenities identified for consideration through this Planning Proposal are therefore focused on additional opportunities to support community sustainability and wellbeing at a local neighbourhood level. This is through local community infrastructure provision that will complement broader infrastructure networks in the broader Waterloo State Significant Precinct and Green Square Urban Renewal Areas.

The following key priorities have been identified in this context:

Providing amenity and choice for local residents

- Community members and stakeholders consulted to inform the development (ref. **Section 7.1**) support a community-focused one-stop-shop community hub close to home, that includes a full line supermarket, and public space for socialising and community gatherings. Participants wanted to see a development that is creative, lively, has its own unique character, while contributing to the broader character of Waterloo.
- The City of Sydney community more broadly (ref. **Section 7.2**) aspires to a quality liveable environment – people want a city that is green with trees and plants, has quality public spaces, is safe, and has different types of housing that is affordable. People want an environmentally sustainable and resilient city, that is also friendly, lively and creative.

Supporting socio-economic diversity in the local area

- There is a lack of affordable housing in the City of Sydney, which has been identified as a priority in a range of the City's strategies and policies. A large proportion of the residents in the study area are renting, in addition residents have lower annual median household income levels when compared to Greater Sydney.
- Access to affordable housing would support the ongoing socio-economic diversity of the City and address housing stress for residents across the City. The majority of lower income households who remain in the private housing market are increasingly in housing stress or crisis and will eventually be forced to move out as housing costs continue to escalate ahead of wage growth.
- Site-specific or precinct planning proposals that allow for more housing can create opportunities for the delivery of public benefits such as affordable rental housing.

8.4 Public benefit options for community infrastructure delivery

Arising from identification of the above priorities and drivers for the site, the following public benefit options have been developed for consideration as part of the Planning Proposal:

1. Affordable housing provision

It is proposed to provide a contribution of approx. 12 affordable rental housing dwellings through the development – a total of approx. 742sq.m GFA based on 65sqm per unit, with arrangements consistent with the provisions of the City's Affordable Housing Program with ongoing management by a registered Community Housing Provider, in accordance with their strategies for meeting local community needs.

2. Public plaza

Provision of a high quality public plaza with garden space which will be the focal point of the new local neighborhood centre that the development will create.

Shopping streets can double as social meeting spaces for communities, and well-designed spaces can attract a higher volume of visitors and support community cohesion. The plaza will provide a space for the residents, workers and visitors to the site to meet and socialise, contributing to local amenity, as well as local social cohesion and social capital building over time. Within the site, the concept embellishes the through site link / retail laneway adjacent to the corner of McEvoy and Young Street with a new public plaza set amongst retained mature canopy trees within a deep soil zone. The plaza features a north-facing lawn area for passive recreation and an area to locate a small kiosk and outdoor furniture settings to create a vibrant local meeting place.

3. Through site links

It is proposed to establish two through site links for additional new visual and permeable connections in an east-west direction from Archibald Avenue through to Young Street. These accessible through-site links are intended to be a minimum 6m wide, with double-sided retail and outdoor seating zones present within the northern location and landscaping and vegetation within the southern location.

The proposed mix of uses to be delivered through the project is intended to create a lively local neighbourhood centre for Waterloo, that will meet a range of local community needs in a walkable way, and contribute to the broader networks of retail outlets, amenities, community infrastructure and open spaces in the broader Green Square Urban Renewal Area and Waterloo State Significant Precinct.

9.0 Social assessment of the Planning Proposal

9.1 Introduction

The purpose of this social assessment is to consider the potential social impacts of the development that would be enabled by the Planning Proposal, both positive and negative, for the community and key stakeholders.

This constitutes a preliminary assessment of the likely operational impacts of the development, as is appropriate to the Planning Proposal stage. A more thorough assessment would be undertaken (through a formal Social Impact Assessment) at the DA stage, when information will be available that will enable a comprehensive assessment of operational as well as construction impacts.

9.2 Assessment approach

The assessment of social impacts in this section is based on the social factors identified in the *Social Impact Assessment Guideline for State Significant Projects* (SIA Guideline) released by the NSW Department of Planning, Industry and Environment in July 2021.

The SIA Guideline is considered by NSW Government to represent best practice in social impact assessment processes and provides a consistent framework and approach.

As outlined in the SIA Guideline, social impacts vary in their nature and can be positive or negative, tangible or intangible, physically observable, or psychological (fears and aspirations). Social impacts can be quantifiable, partly quantifiable or qualitative. They can also be experienced or perceived differently by different people and groups within a community, or over time.

The SIA Guideline classifies social impacts in the following way, which forms the core basis of this assessment:

- **Way of life:** *how people live, get around, work, play and interact with one another each day*
- **Community:** *its composition, cohesion, character, how it functions, resilience, and people's sense of place*
- **Accessibility:** *how people access and use infrastructure, services and facilities (private, public, or not-for-profit)*
- **Culture:** *both Aboriginal and non-Aboriginal - people's shared beliefs, customs, practices, obligations, values and stories, and connections to Country, land, waterways, places and buildings*
- **Health and wellbeing:** *people's physical, mental, social and spiritual wellbeing – especially for people vulnerable to social exclusion or substantial change, psychological stress (from financial or other pressures), access to open space and effects on public health*
- **Surroundings:** *access to and use of natural and built environment, including ecosystem services (shade, pollution control, erosion control), public safety and security, as well as aesthetic value and amenity*
- **Livelihoods:** *including people's capacity to sustain themselves through employment or business*
- **Decision-making systems:** *the extent to which people can have a say in decisions that affect their lives, and have access to complaint, remedy and grievance mechanisms.³⁹*

The following preliminary social assessment is based on information currently available and set out through **Sections 2.0 to 7.0**.

³⁹ The proposals impacts on decision-making systems have been identified as negligible, and have not been further assessed in this report.

Key affected communities

The primary focus of this assessment is the Total Trade Area (TTA) that has been defined to represent the local community within the immediate area of the site. This broadly includes residents living within 800m of the subject site, which are considered of most relevance. (See **Section 5.2** for further detail).

Key affected communities include:

- The current local residents in the study area, including adjacent neighbours of the site, and;
- The broader community in the locality, including local workers, businesses, visitors to the area (including users of Bourke Street).

Assumptions applied

Assumptions applied to complete this assessment include:

- The key findings of the background studies and technical reports are accurate.
- Socio-economic data for each study area accurately reflects the community demographic profile.
- Outcomes of the community consultation and engagement undertaken to date accurately reflect community views.
- All potential social impacts to the local community and special interest groups that can reasonable be identified have been included in this report.
- **A note on COVID-19:** COVID-19 is an unprecedented global health crisis and economic event that is rapidly evolving. At the current time, the research and analysis of economic and population data – such as forecasts of population or employment growth and so on – reflects a return to “business as usual” scenario, while also noting the potential impacts that may be associated with the COVID-19 virus, travel and border restrictions impacting on migration numbers, and the anticipated return to growth in economic or population indicators.

9.3 Social assessment across key factors

This section will provide an assessment of the social context relevant to the Planning Proposal and accompanying indicative reference scheme, including matters such as increased availability of retail, employment, housing diversity, access to social infrastructure and civic domain improvements.

9.3.1 Way of life: how people live, get around, work, play and interact with one another each day

Likely social impacts and benefits associated with delivery of the proposal include:

- Increased convenience for shoppers, residents and visitors to the Study Area associated with delivery of a new supermarket adjacent a key transport artery. Importantly, the proposal would improve way of life for nearby residents, with the delivery of a local neighbourhood centre (including a 'best in class' supermarket, cafes, retail, and high quality public plaza) close to the homes of a large number of local residents, in an area with limited access to full-line supermarket offering. The development will increase opportunities for residents to access daily living needs in a location close to their home and educational facilities. It is noted that post-COVID there may be increased demand for services and amenities within local neighbourhoods with an enhanced role for local centres to support the social and economic needs of communities.
- A concentration of shopping, public space and other services in an area encourages people to be more socially active, enhancing the liveability and viability of place.
- Positive way of life benefits associated with delivery of housing co-located with a local neighbourhood centre, close to public transport, employment opportunities, educational facilities, and adjacent proposed Water Square amenity (Danks Street South Precinct). Specifically, the proposed development would result in:
 - Delivery of a total of 124 new apartments,
 - A contribution to the equivalent of approximately 12 affordable housing dwellings.
- Residents of these units would benefit from access to daily living needs and public transport, which would reduce travel times and enhance convenience. This will contribute towards delivery of a "30-minute city" where people can access housing, employment, education and other services, including retail, within a short distance of their home.
- Potential way of life impacts associated with delivery of housing along the busy Bourke Street, which have been mitigated by building design features and elements in the indicative reference scheme and which are to be further detailed at the DA stage.
- Potential positive benefits associated with increased employment opportunities within a contemporary high-quality 'best in class' retail working environment due to the delivery of a new supermarket and retail street at this location. The proposal would support around 273 ongoing FTE local retail jobs.
- Improved way of life for local residents and workers in the context of overall improvements and development in the broader GSURA.

9.3.2 Access to and use of infrastructure, services and facilities

- Positive social benefits are associated with a Woolworths supermarket store, within walking distance to public transport and other retail opportunities. The location of the site will enable local residents to access fresh produce, within a short walking distance from their homes.
- With the number of residents in the area forecast to increase significantly, there is a need for provision of additional food retailers in the area. In particular, the provision of a supermarket at this site, may benefit local residents that do not have, or prefer not to use a car, and also providing the ability for them to access a localised delivery service.
- Community members have expressed a strong desire for a one-stop-shop destination with support for a full-line Woolworths supermarket at this site. A premium food and retail destination close to home, and a high-quality plaza for community gatherings were seen as the most important community benefits of the proposal.
- There are also likely benefits associated with delivery of housing in a location well-connected to retail, training and employment opportunities, schools, public transport and open space. The accessibility of these facilities for residents of this site will support residents' wellbeing and quality of life.

- Some community members have expressed concern, that there may be potential traffic impacts due to some shoppers accessing the proposed supermarket by private vehicle, which could generate congestion. Green Square residents consider traffic as one of the biggest dislikes in the area in general. Residents want quality integrated and active transport network, and some think it takes too long to walk to local shops and parks in Waterloo area.
- Provision of the proposed supermarket to cater for a walkable catchment will help alleviate those concerns and achieve the Greater Sydney Commission’s goal of a 30-minute city – reducing travel times and increasing opportunities for people to spend time with their family and friends.
- Delivery of a supermarket closer to homes may in fact reduce the need for car travel to existing supermarkets further away. It is noted that the intention of the development is to firsthand serve a local catchment, catering for the resident community and visitors who would be able to access the premises on foot. There is hence potential to mitigate traffic congestion impacts by ensuring easy access and linkages with existing active transport networks and public transport stops. It is noted that the proposed development includes 216 basement parking spaces to accommodate residents, visitors and staff, reducing impacts associated with shoppers taking up on street parking along adjacent streets.
- Major deliveries have been addressed through the provision of a loading zone within the basement of the proposal.

9.3.3 Community: composition, cohesion, character, how it functions, resilience, people’s sense of place

- Population growth is associated with the delivery of the proposed development, with impacts to community composition. The proposed development would result in the delivery of 121 dwellings, however this should be contextualised within the broader urban renewal in the area.
- The site would also support around 273 FTE ongoing local retail jobs, and 120 workers associated with the delivery of the commercial uses on the site (based on estimated 60 workers per 1000sqm).
- City of Sydney research focussing on the South Sydney area show that community cohesion in the area is somewhat low while the neighbourhoods are being developed and new people are moving in and out. Local streets and shops are important places for people to socialise, among others. A concentration of employment, and training opportunities and daily living needs in an area encourages people to be more socially active, and enhances the liveability of the place. Delivery of the proposed retail street and a high quality plaza would create a local neighbourhood centre that will encourage local residents, workers and visitors to the area to come together and socialise.
- Potential improvements to sense of place are likely to be associated with provision of this high-quality and architecturally designed development at this site as it will deliver on the community aspiration for ‘quality liveable environment’. People want a city that is green with trees and plants, has quality public spaces, is safe, and has different types of housing that is affordable. The proposed development will provide new homes, education spaces and workplaces, including affordable dwellings and working spaces, and enhance the amenity of the area. This may catalyse a new connection to place for residents, workers and visitors to the area.
- Many positive benefits are associated with delivering the retail offering at the Site. As identified in the strategic policy and social research review, shopping streets can double as social meeting spaces for communities, and well-designed spaces can attract a higher volume of visitors and support community cohesion. The co-location of the supermarket with other retail and residential uses will provide a space for the users of the site to meet each other can provide a successful mix that enhances the liveability for the local community.
- Communal open spaces for residents of the site at podium and rooftop levels will help to encourage social interaction and build social cohesion amongst the residents.
- Such communal and public spaces acting as “third spaces” where community members can relax and socialise outside of their homes and workplaces help meet the increased need driven by growth of high-density living in Waterloo and the broader Green Square Urban Renewal Area.

9.3.4 Culture: shared beliefs, customs, values and stories, and connections to land, places, buildings

- People living in the City of Sydney area want an environmentally sustainable and resilient city, that is also friendly, lively and creative.
- Positive impacts to connection to place may occur associated with the built form and design of the proposed buildings and delivery of publicly accessible open space and productive rooftop garden on site. The spaces will provide places to engage both actively and passively and provides opportunities for people to connect.
- Positive impacts to community connections associated with retail, commercial and residential uses and publicly accessible plaza at this site, including communal spaces for the residents to interact.
- Negative changes to ‘connection to place’ associated with the proposed development are unlikely, or would be minimal, as the site is currently not offering significant amenity. Improvements to connection to place are therefore likely, associated with provision of this high-quality and architecturally and sustainably designed development at this site as it will deliver on the community aspiration for quality public spaces and liveable environment. The proposed development seeks to enhance the local neighbourhood character through its unique high-quality design, built to star Green Star sustainability standards, provision of a public plaza and landscaping, and would as such enhance the amenity of the area.

9.3.5 Health and wellbeing – including physical, mental, social and spiritual, and especially for vulnerable people; access to open space and effects on public health

- Potentially improved wellbeing for the new residents at a highly walkable site supported by infrastructure, close to the Green Square centre and various recreational areas, which may encourage physical activity. The proposal includes a high quality public plaza, activated ground plain and street frontages, and a through-site link to improve amenity in order to encourage walkability of the site.
- Community members have expressed a strong desire for a one-stop-shop destination with support for a Woolworths supermarket at this site. A premium food and retail destination close to home, a high-quality plaza for community gatherings, and Five Star Green Star sustainability rating were seen as the most important community benefits of the proposal. In response to these community sentiments and other strategic drivers for Fabcot and the Woolworths Group more broadly, the proposed development will deliver a strong sustainability focus throughout, including through the commercial building and supermarket fitout.
- The proposal supports those aspirations and associated health benefits and wellbeing benefits by improving access to fresh food in a neighbourhood where there are currently limited number of supermarkets available within walking distance of this site. The proposed development will deliver:
 - A 3,200sqm Woolworths supermarket at the lower ground level of the development, providing fresh food.
 - 1,670sqm of retail GFA, supporting further food retail and hospitality uses
 - 2,025sqm of commercial GFA ,that will be considered by Woolworths for community needs or curated commercial purposes to strengthen the offering of the site as an emerging neighbourhood centre.
- Networks and social capital can be built through the creation of public spaces and places that allow individuals, particularly those from a lone person household, to connect to others in their neighbourhood. Publicly accessible spaces and retail hubs can function as “third spaces” where community members can relax and socialise outside of their homes. A built environment that supports connectivity and builds relationships can have positive contributions to overall health and wellbeing outcomes. Some of the spaces that the proposal will deliver that can support these outcomes include:
 - Provision of a high quality plaza
 - Provision of a supermarket and a retail street
 - Commercial floorspace for here various organisations and people would meet to learn, create or work
 - Podium level courtyard spaces for residents of the site to socialise
 - Retention of mature trees
- Wellbeing benefits are also associated with improved activation and enhanced amenity of the site, which may increase perceptions of safety and opportunities to connect with other members of the community.

- There may be potential traffic impacts on pedestrian safety associated with increased number of shoppers accessing the site by car. However the intention of the development is to firsthand serve a local walkable catchment, and there is a potential to mitigate this impact by ensuring easy access and linkages with existing active transport networks and public transport stops and pedestrian safety principles.
- Potential noise impacts on the residents, workers and visitors to the site are associated with the delivery of dwellings, and a public plaza at this site, next to a busy street. The impacts can be negative, or mitigated, depending on the design elements of the building and landscape mitigating the potential noise.

9.3.6 Surroundings: access to and use of natural and built environment, including ecosystem services, public safety and security, as well as aesthetic value and amenity

- City of Sydney research indicates that people want a city that is green with trees and plants, has quality public spaces, and is safe. People want an environmentally sustainable and resilient city, that is also friendly, lively and creative.
- The proposed development will respond to that and enhance the local neighbourhood with the proposed attractive, high-quality architecturally designed mixed-use buildings and public spaces at the site, improving amenity and opportunities for enjoyment of this site. Landscaping throughout the site and active frontages will enliven and improve the streetscape along Bourke, Young and McEvoy Streets and surrounds.
- The proposal would also meet the state government priority to ensure new development provides high standard of design quality and does not adversely impact upon the amenity of neighbours or the wider community.
- The redevelopment of the site is also likely to improve perceptions of safety associated with amenity and streetscape. The presence of workers, residents and visitors will also contribute towards improved perceptions of safety.
- There is potential for increased traffic movements associated with the operation of the supermarket at this site. This may increase local congestion; however, it is noted that the proposed development includes 216 basement parking spaces to accommodate residents, visitors and staff, and is located adjacent to a bus stop on Bourke Street. On the other hand, delivery of a supermarket closer to homes may reduce the need for car travel to currently existing supermarkets further away. It is noted that the intention of the development is to firsthand serve a local walkable catchment. (Traffic and accessibility impacts are further discussed in **Section 9.5.2**)
- The activation of Bourke Street on this site during evening hours (due to residents, workers and visitors to retail shops) provides a positive social benefit in the support of the local night time economy.
- Potential improved perceptions of safety are associated with increased activation of the site due to increased number of residents, workers and visitors on the site, or accessing the retail and other services in the area. This would increase the amount of pedestrian movement and activate the area, most likely during the day and early hours of the evening. Improved perceptions of safety may be valuable to any residents that need to access and move around the site during late night hours.

9.3.7 Livelihoods: people’s capacity to sustain themselves, whether they experience personal breach or disadvantage, and the distributive equity of impacts and benefits

- Potential positive impacts associated with increased employment opportunities close to public transport infrastructure and in walking distance from the Study Area homes associated with the operation of the Woolworths store and other commercial uses proposed to be delivered on this site. The new Woolworths supermarket and specialty retail will create around 273 local jobs.
- The project can further amplify benefits associated with job creation by applying social procurement and employment practices through its construction and operational phases.
- The proposal will contribute to ongoing employment opportunities in the area, which will have broader social and economic benefits to the workers and their dependants, who may live in the study area or beyond.
- The proposed development will support increased patronage for local businesses, including at night, based on the increased activation (additional residents, workers and visitors) in the area.
- Permanent changes to the streetscape, improved access to daily needs, and provision of amenity on this site may have positive impacts on the value of property surrounding the site.

10.0 Social strategy directions

The following section sets out recommended directions for considering and optimising social sustainability outcomes through the proposed development, drawing on the evidence base and social assessment presented in this report. It focused on the community benefits and social value of delivering improved access to retail and commercial uses on this site.

10.1 Creating a vibrant new neighbourhood centre for Waterloo

The development will create a vibrant mixed use neighbourhood centre for Waterloo, bringing local residents opportunities to meet, socialise, create, work and establish local social connections that are shown to build social capital and local community resilience over time.

The provision of a supermarket in Waterloo, along with commercial uses, with a through-site link and civic plaza will significantly enhance local amenity in the Waterloo locality. Retention of significant mature street and onsite canopy vegetation is intended, as well as 121 new homes including contributions to increased affordable housing.

A range of new development and renewal projects in Waterloo, including the Waterloo Metro Quarter and longer term plans for the renewal of the Waterloo Estate indicate a growing need for and the provision of services to meet the needs of this growing community. The focus of the proposed development is to create a vibrant neighbourhood centre, which is complementary to the broader district scale centre – Green Square Town Centre.

The Proponent intends to deliver, as part of this Planning Proposal, affordable housing contributions, electric vehicle charging facilities, site specific sustainability measures and local infrastructure by way of a Voluntary Planning Agreement (VPA) to be entered into with Council.

10.2 Provision of affordable housing

The application proposes to deliver affordable housing – which can be classified essential community infrastructure, and for which there is a large and growing need in the inner city, as demonstrated in the City of Sydney's Local Housing Strategy.

Provision of affordable housing contributions to support the provision of approx. 12 units (circa 742sqm) will contribute to the diverse mix of uses on the site, incorporating essential infrastructure that will make a tangible contribution to the sustainable growth and ongoing wellbeing and resilience of local communities. The location of the affordable housing, in the urban renewal area of Waterloo close to infrastructure, jobs, services and reliable public transport, will align with the City's broader strategic objectives to provide 'housing for all' as well as NSW State Government priorities to deliver integrated land use and transport planning and a 30-minute city. The proposed affordable housing has been carefully developed with regard to relevant strategic policy drivers, along with an examination of issues and trends affecting local communities.

The provision of a high amenity through-site link and public plaza will complete the development as a new neighbourhood centre in its form and function, making a significant contribution to community infrastructure available to local residents in Waterloo and surrounding neighbourhoods. The proposed uplift provision of affordable housing, a critical social infrastructure, is a significant contribution of this proposal to the local community.

10.3 Supporting local socio-economic development

As a mixed-use centre, the development brings the potential to make a significant contribution to local socio-economic development. This is through its creation of direct employment, as well as indirect education, employment and training opportunities.

First and foremost, the proposal will create a number of jobs through its construction and ongoing operation, including the provision of service-based jobs that create local employment opportunities. It is estimated the site will support around 273 local retail jobs, and 120 workers associated with the delivery of the commercial uses on the site. Through the creation of a mixed-use neighbourhood centre that combines commercial and community floorspace – with a focus on community-based enterprises – the development has the potential to operate as a generator of local enterprises, with the potential to bring significant long term social and economic benefits to the Waterloo locality.

APPENDICES

Appendix A. Community Profile – Current and Forecast

Table 2 Population profile of study area (trade area) 2016

Source: ABS Census 2016, Ethos Urban

Category	Primary Trade Area	Secondary North	Secondary South	Secondary West	Total Trade Area	Greater Sydney
Income	-	-	-	-	-	-
Median individual income (annual)	\$54,910	\$36,700	\$47,530	\$22,640	\$42,940	\$37,460
Variation from Greater Melbourne median	46.6%	-2.0%	26.9%	-39.6%	14.6%	na
% of persons (15 years or older) earning \$1,000pw or more	52.0%	41.8%	46.5%	26.9%	44.1%	37.3%
Median household income (annual)	\$112,940	\$45,150	\$97,850	\$25,490	\$82,440	\$92,200
Variation from Greater Melbourne median	22.5%	-51.0%	6.1%	-72.4%	-10.6%	na
% of Households earning \$2,500pw or more	40.2%	26.0%	33.2%	14.3%	30.1%	31.8%
Individual income						
<i>No income</i>	15.1%	5.2%	24.2%	11.8%	16.1%	12.3%
<i>Low</i>	21.0%	43.2%	16.1%	51.6%	28.2%	34.2%
<i>Medium</i>	45.8%	34.7%	44.2%	28.2%	40.5%	41.9%
<i>High</i>	18.1%	16.9%	15.4%	8.4%	15.2%	11.6%
Household income						
<i>No income</i>	6.8%	2.2%	13.4%	5.5%	7.8%	2.0%
<i>Low</i>	7.5%	41.3%	8.5%	50.1%	22.6%	14.1%
<i>Medium</i>	30.0%	23.1%	30.9%	24.3%	27.9%	39.6%
<i>High</i>	55.7%	33.5%	47.2%	20.1%	41.7%	44.3%
Age Structure	-	-	-	-	-	-
0 years	1.2%	0.4%	1.2%	0.8%	1.0%	1.2%
1-2 years	1.7%	1.4%	2.2%	1.0%	1.7%	2.6%
3-4 years	1.2%	0.7%	1.6%	0.9%	1.2%	2.6%
5-6 years	0.6%	0.5%	0.7%	0.9%	0.7%	2.6%
7-11 years	1.2%	1.5%	1.2%	1.5%	1.3%	6.2%
12-17 years	1.4%	2.0%	1.0%	2.1%	1.5%	6.9%
18-24 years	19.6%	4.3%	26.6%	11.9%	18.1%	9.6%
25-34 years	40.2%	18.1%	40.2%	21.5%	33.3%	16.2%
35-49 years	21.3%	23.3%	16.7%	17.2%	19.3%	21.3%
50-59 years	5.9%	17.3%	4.8%	12.5%	8.5%	12.3%
60-69 years	3.9%	14.8%	2.5%	12.9%	6.8%	9.4%
70-84 years	1.8%	13.0%	1.1%	14.5%	5.7%	7.1%
85 years and over	0.1%	2.6%	0.1%	2.2%	0.9%	1.9%
Males	53.1%	53.4%	50.3%	51.0%	51.8%	49.3%
Females	47.0%	47.0%	49.8%	48.9%	48.3%	50.7%
Total persons	9,090	3,670	8,410	5,530	26,700	4,823,900
Median Age (years)	30.0	48.0	28.0	43.0	31.0	36.0

Category	Primary Trade Area	Secondary North	Secondary South	Secondary West	Total Trade Area	Greater Sydney
<u>Country of Birth</u>						
Australia	39.1%	54.1%	31.0%	44.7%	39.5%	61.9%
<i>Aboriginal and Torres Strait Islanders</i>	1.4%	3.1%	0.6%	5.4%	2.2%	1.4%
Other Major English Speaking Countries	16.1%	13.6%	11.2%	8.9%	12.8%	7.6%
Other Overseas Born	44.8%	32.2%	57.9%	46.3%	47.7%	30.5%
<i>% speak English only at home</i>	54.8%	67.3%	40.1%	52.9%	51.3%	62.5%
<u>Previous Address</u>						
Same address as 1 year ago	61.7%	82.9%	63.9%	74.7%	67.7%	83.9%
Different address 1 year ago	38.3%	16.6%	35.8%	24.9%	31.9%	16.0%
Same address as 5 year ago	19.3%	52.5%	16.4%	48.3%	28.4%	56.6%
Different address 5 year ago	80.7%	46.1%	82.4%	51.0%	70.7%	42.9%
<u>Household Composition</u>						
<i>Couple family with no children</i>	35.0%	23.3%	34.0%	19.2%	29.2%	23.8%
<i>Couple family with children</i>	10.5%	7.7%	12.7%	5.6%	9.6%	37.5%
Couple family - Total	45.5%	31.0%	46.6%	24.9%	38.8%	61.3%
One parent family	4.7%	5.2%	4.5%	9.6%	5.9%	11.1%
Other families	2.7%	1.4%	2.5%	1.8%	2.2%	1.3%
Family Households - Total	52.9%	37.6%	53.7%	36.3%	46.9%	73.7%
Lone person household	26.5%	52.4%	24.8%	53.5%	36.2%	21.7%
Group Household	20.6%	10.0%	21.6%	10.2%	16.8%	4.6%
<u>Dwelling Structure (Occupied Private Dwellings)</u>						
Separate house	0.2%	0.3%	0.0%	0.2%	0.2%	57.2%
Semi-detached, row or terrace house, townhouse etc.	9.0%	18.6%	4.7%	10.1%	9.4%	14.0%
Flat, unit or apartment	90.9%	81.2%	95.3%	89.4%	90.4%	28.2%
Other dwelling	0.0%	0.0%	0.0%	0.3%	0.1%	0.5%
<i>Occupancy rate</i>	90.3%	90.7%	90.1%	91.9%	90.7%	92.3%
Average household size	2.2	1.8	2.2	1.7	2.0	2.8
<u>Tenure Type (Occupied Private Dwellings)</u>						
Owned outright	8.4%	13.7%	8.6%	3.4%	8.1%	30.0%
Owned with a mortgage	25.2%	16.7%	25.3%	10.8%	20.7%	34.2%
Rented	66.0%	68.2%	65.7%	84.6%	70.5%	35.1%
<i>State or territory housing authority</i>	4.4%	41.0%	0.8%	61.6%	21.8%	4.2%
Other tenure type	0.4%	1.3%	0.3%	1.2%	0.7%	0.7%

Category	Primary Trade Area	Secondary North	Secondary South	Secondary West	Total Trade Area	Greater Sydney
<u>Attending Education (% of those attending)</u>						
Pre-school	2.6%	6.9%	2.3%	2.4%	2.7%	6.9%
Infants/Primary Total	6.5%	18.9%	5.8%	11.8%	7.8%	32.2%
<i>Government</i>	74.5%	75.6%	62.2%	74.3%	70.9%	68.4%
<i>Catholic</i>	16.4%	15.4%	23.7%	25.7%	20.5%	19.7%
<i>Other</i>	9.1%	9.0%	14.1%	0.0%	8.7%	11.9%
Secondary Total	5.7%	14.4%	4.1%	11.2%	6.4%	25.0%
<i>Government</i>	45.6%	58.0%	45.5%	63.3%	51.4%	54.8%
<i>Catholic</i>	23.4%	20.0%	17.8%	30.6%	23.3%	26.4%
<i>Other</i>	31.0%	22.0%	36.6%	6.1%	25.3%	18.9%
Technical or Further Educational Institution	13.3%	17.6%	7.5%	13.0%	11.2%	7.6%
University or other Tertiary Institution	58.3%	32.9%	71.4%	53.5%	61.3%	24.2%
Other type of educational institution	13.5%	9.3%	9.0%	8.0%	10.6%	4.0%
<i>% of total population attending education</i>	26.8%	12.3%	32.2%	17.1%	24.5%	25.2%
<u>Highest Level of Education Completed (% of population aged 15 years and over)</u>						
Year 12 or equivalent	87.5%	70.3%	88.7%	66.5%	81.7%	67.5%
Year 9-11 or equivalent	10.7%	21.8%	10.0%	24.5%	14.5%	26.7%
Year 8 or below	1.4%	6.0%	1.0%	6.7%	2.9%	4.4%
Did not go to school	0.4%	2.0%	0.2%	2.3%	0.9%	1.5%
<u>Highest Level of Non-School Qualification</u>						
Postgraduate degree	20.3%	15.8%	25.1%	15.4%	20.6%	13.9%
Graduate diploma or certificate	3.7%	4.2%	3.1%	3.3%	3.5%	3.4%
Bachelor degree	49.1%	45.6%	46.1%	40.4%	46.3%	36.4%
Advanced diploma or diploma	14.0%	16.6%	13.3%	16.9%	14.5%	17.7%
Certificate	13.0%	17.8%	12.4%	24.0%	15.1%	28.6%
<i>% of persons with non-school qualifications (persons 15 years and above) - excludes not-stated and inadequately described</i>	61.9%	51.6%	60.1%	41.0%	55.6%	52.7%
<u>Employment Status</u>						
Unemployed/ looking for work	6.5%	7.6%	6.9%	12.9%	7.6%	6.0%
Labour force participation rate	75.8%	58.3%	68.0%	45.8%	65.1%	65.6%
<u>Need for Assistance</u>						
With Need for Assistance	9.8%	6.5%	8.1%	6.9%	8.2%	4.9%
No Need for Assistance	84.1%	88.0%	87.4%	87.1%	86.2%	88.7%
Need not stated	6.1%	5.5%	4.5%	6.0%	5.6%	6.4%

Table 3 Population forecasts for the study area to 2036

Population	2016	2021	2026	2031	2036	Change (2021-2036)
Primary	9,700	12,500	16,200	18,400	19,400	+6,900
Secondary North	3,900	4,500	5,200	5,700	6,000	+1,500
Secondary South	9,000	11,000	12,000	13,000	14,000	+3,000
Secondary West	5,900	6,800	7,300	11,300	16,000	+9,200
Total Study Area	28,400	34,800	40,700	48,400	55,400	+20,600
Average Annual Change		2016-21	2021-26	2026-31	2031-36	Change (2021-2036)
Primary	-	+570	+740	+440	+200	+460
Secondary North	-	+110	+150	+100	+50	+100
Secondary South	-	+400	+200	+200	+200	+200
Secondary West	-	+180	+100	+800	+950	+610
Total Study Area	-	+1,270	+1,190	+1,540	+1,400	+1,370
Average Annual Growth %		2016-21	2021-26	2026-31	2031-36	Change (2021-2036)
Primary	-	5.3%	5.3%	2.6%	1.1%	3.0%
Secondary North	-	2.8%	3.2%	1.9%	0.9%	1.9%
Secondary South	-	4.1%	1.8%	1.6%	1.5%	1.6%
Secondary West	-	3.0%	1.4%	9.1%	7.3%	5.9%
Total Study Area	-	4.1%	3.2%	3.5%	2.7%	3.1%