

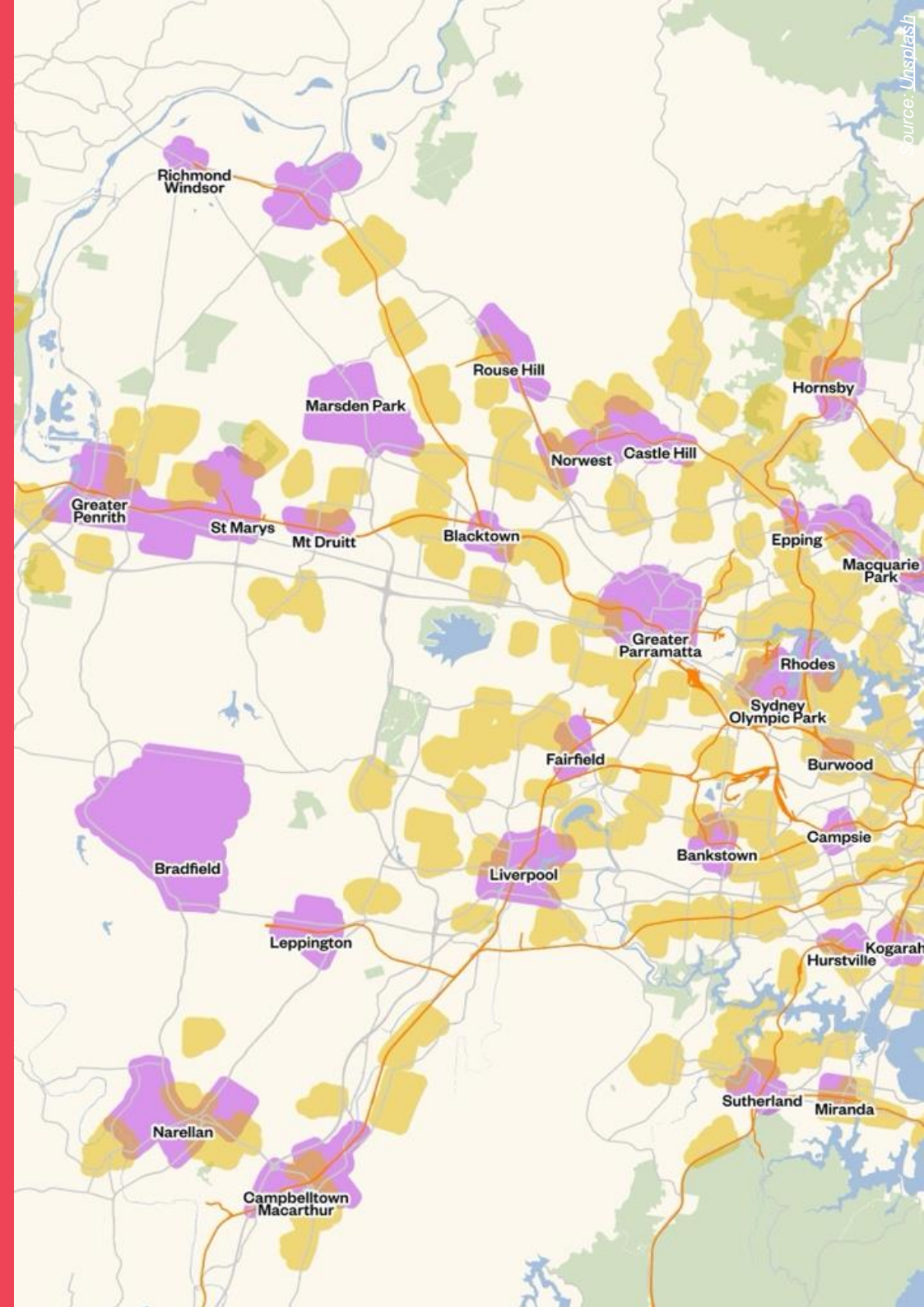


# Sydney's Polycentric Advantage: Leveraging Centres for Housing Solutions

November 2023



Committee  
for  
Sydney



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# Acknowledgement of Country

We acknowledge Aboriginal and Torres Strait Islander peoples as the Traditional Custodians of our land – Australia.

We pay our respects to their Elders both past and present. We recognise that sovereignty was never ceded. This was, and always will be, Aboriginal land.

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## Introduction

We know that housing unaffordability is a threat to the future potential of Sydney, and it's deeply impacting every single one of us.

The struggle to afford suitable housing in the right locations is real. The Committee's paper 'Chronically Unaffordable housing' found that it's costing Sydney's talent, innovation and productivity more than \$10bn per year.

Density is a big part of Sydney's housing solution, but we must do it well.

One of the key indicators of density done well is that it's in well-located, walkable, connected and mixed-use environments, what planners would refer to as 'centres'.



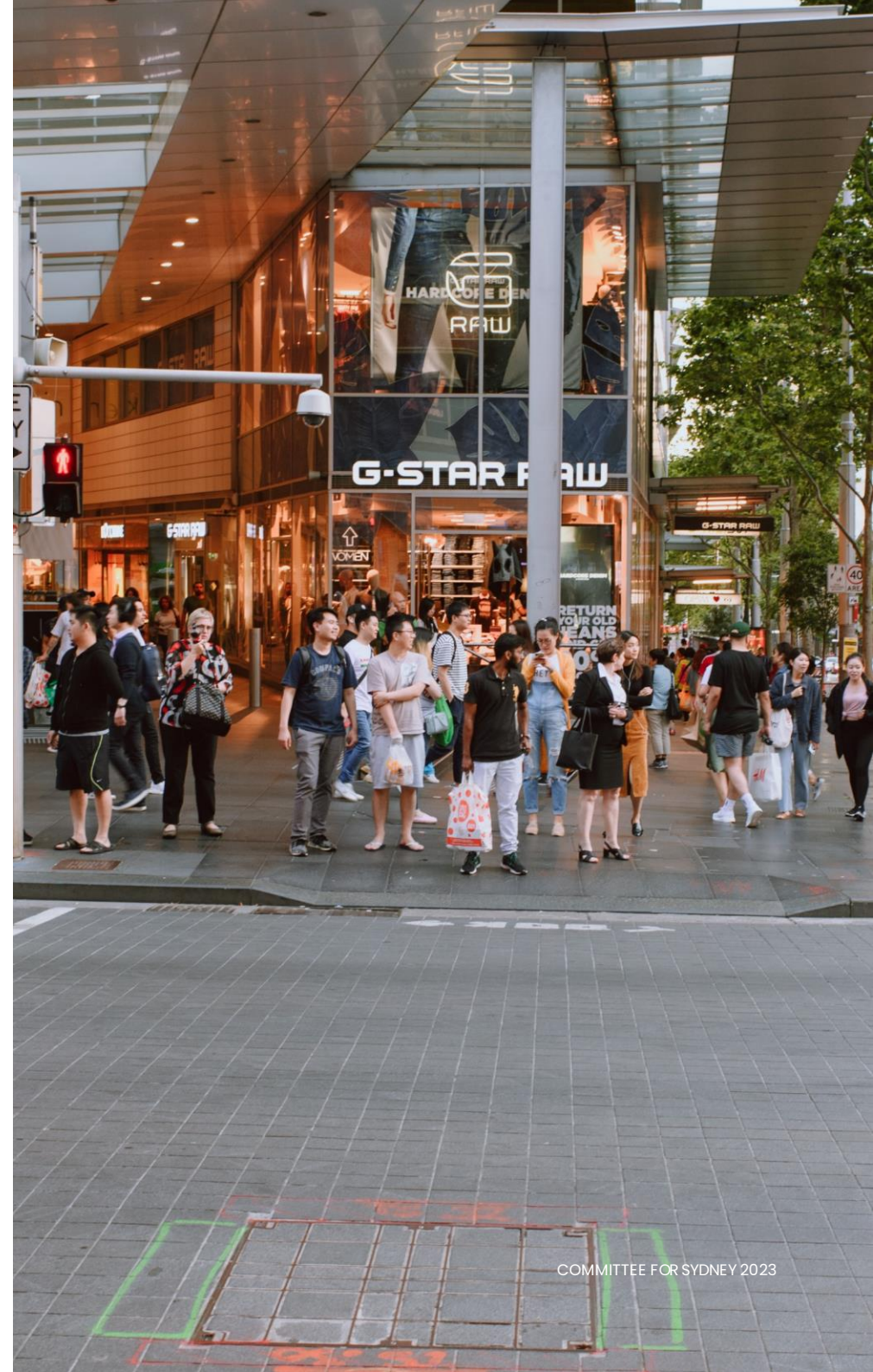
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Centres are often the heart of communities, they are where you can access the shops, cafes, bars, medical centres, childcare, libraries and more. They're also great places to live if you want to be able to access your everyday necessities within a short walking distance.

As Sydney densifies to meet our housing targets, we need to build more social, affordable and market housing in, or within walking distance to centres.

But creating new centres is not always easy. It requires substantial initial investment in basic utilities, transport connections and other critical amenities to flourish. Attracting businesses and residents can be challenging, as new centres often lack the immediate conveniences and services available in established locations.

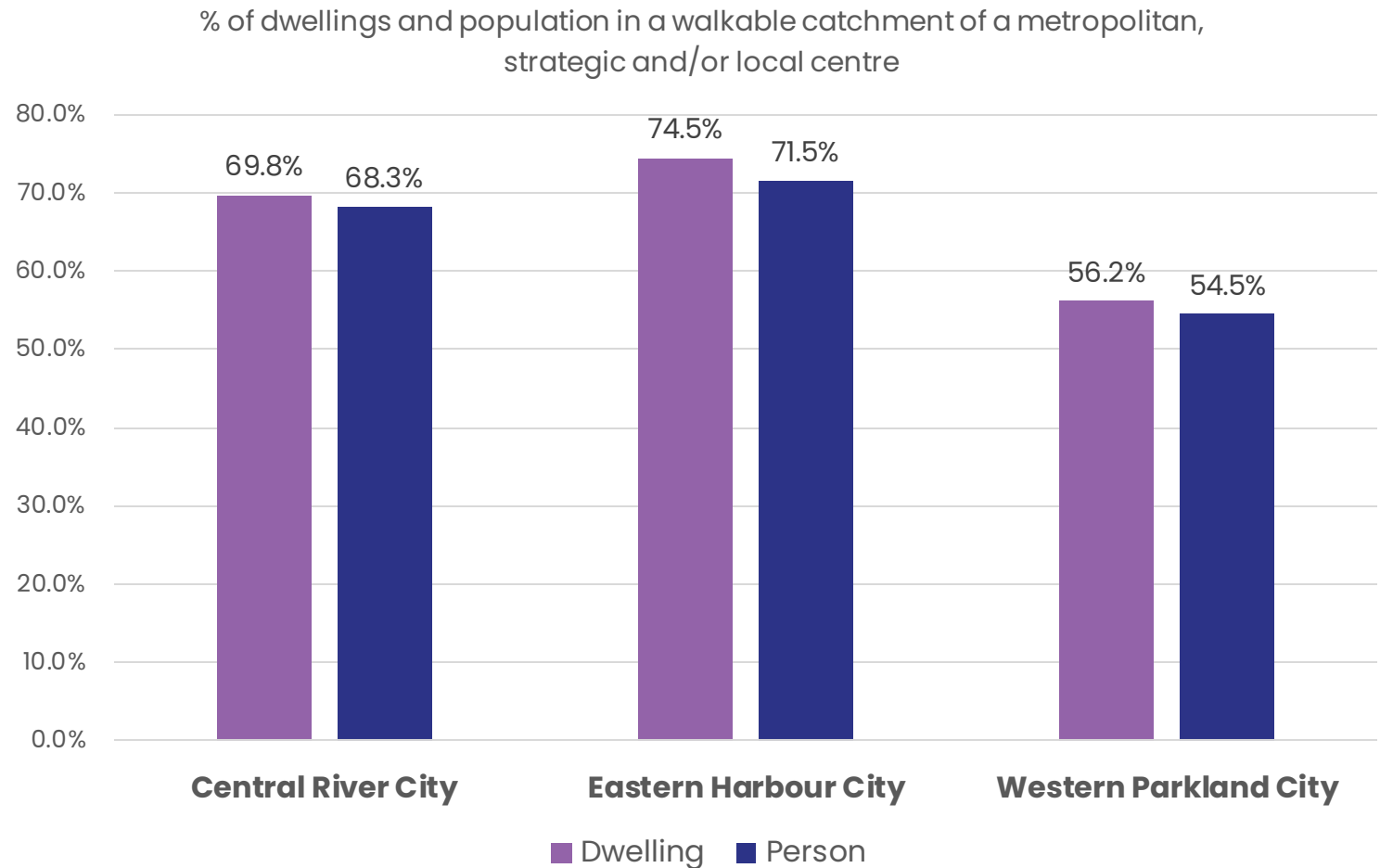
The good news is that Sydney already has the backbone for walkable mixed-use neighbourhoods with good access to open space, jobs and services.



## Almost 70% of Sydney's dwellings already fall within walking catchment of a centre

It may not always feel like it, but Sydney is a polycentric city. The diversity and distribution of Sydney's strategic and local centres is a significant advantage for the city. More than 75% of Sydney's strategic centres already benefit from rail access.

Mecone's research has found that almost 70% of Sydney's dwellings already fall within the catchment of a centre. Strategic and metropolitan centres, which are the highest order centres, accommodate just under 30% of Sydney's population within a walkable catchment.

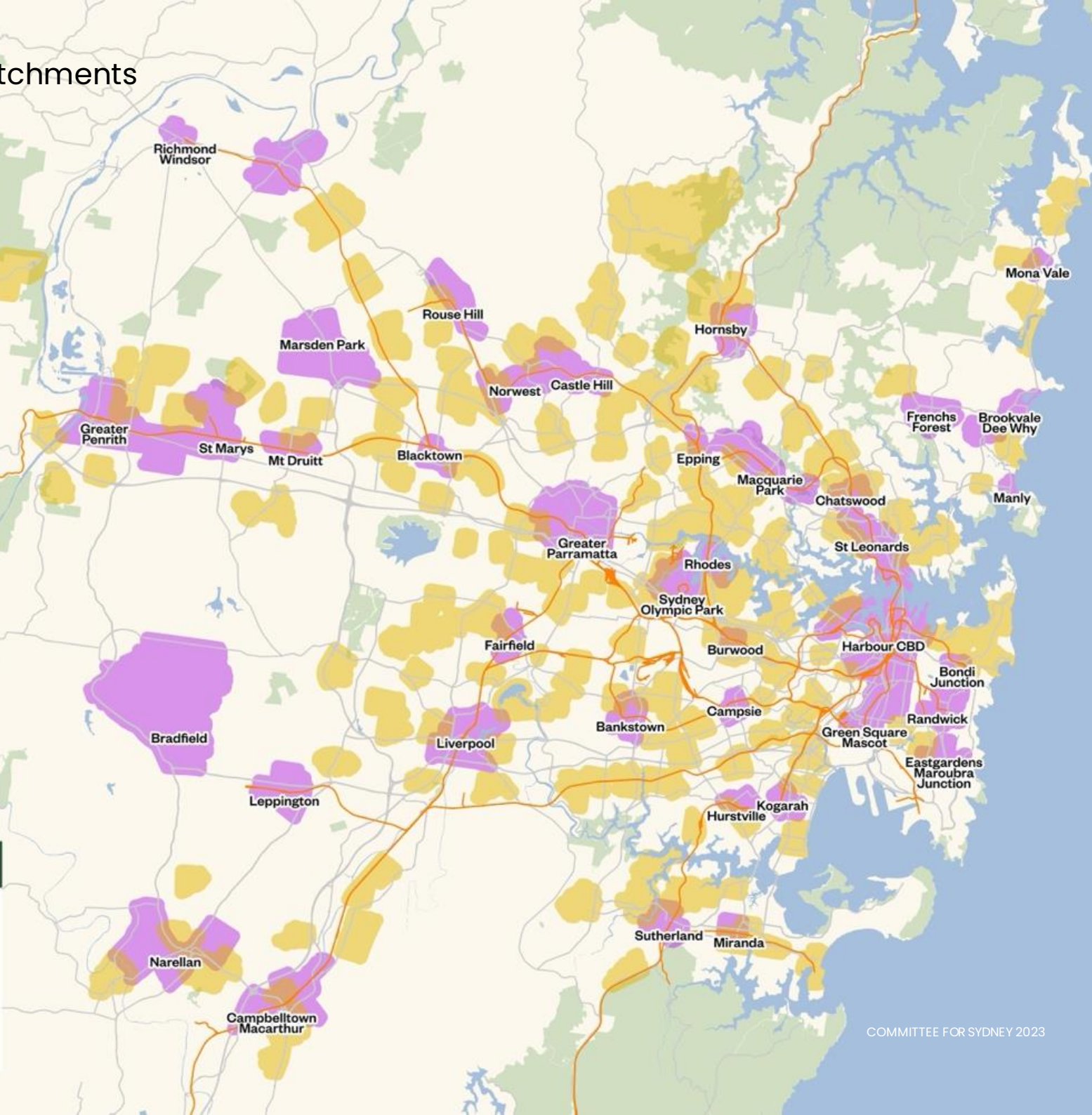


Source: Mecone Analysis, using ABS 2021 census data

# Greater Sydney's centre catchments

**LEGEND**

- Local Centres - 400m Catchments
- Strategic Centres - 400m Catchments
- National Parks
- Railways
- Roads



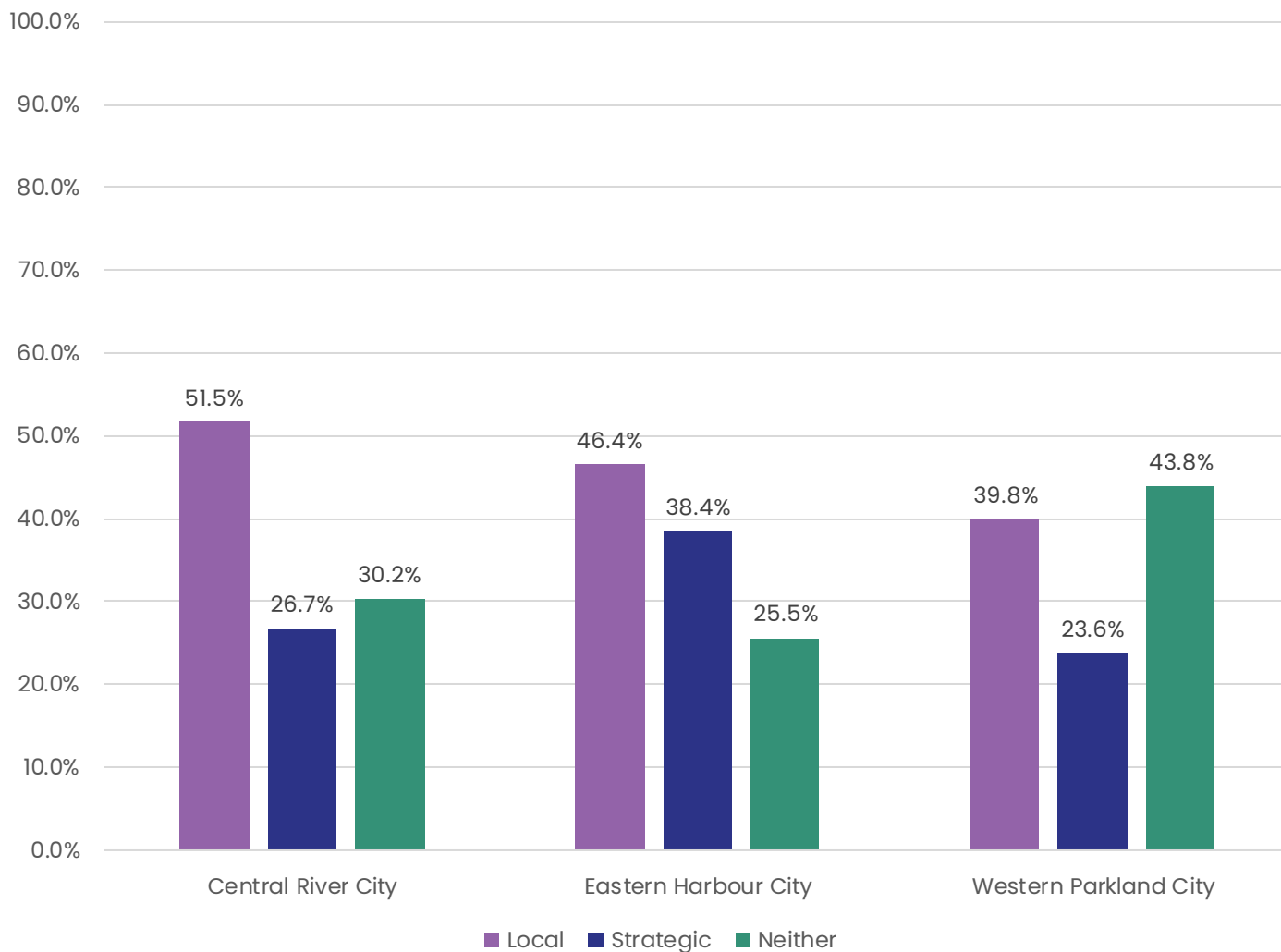
Source: Mecone

## However, this level of access isn't even across Sydney's three cities.

Low-density suburban sprawl in Sydney's west has meant that only 54% of Western City residents are within a walkable catchment of a centre. Denser development in the Eastern and Central Cities accommodate around 70% of population within centres.

Analysis undertaken by Mecone indicates that the proportion of new housing in greenfield areas of Sydney has more than doubled over the past 5 years. In 2022-23, around 47% of Sydney's new homes were built in greenfield areas. Of all these, only 3% were within the walkable catchment of a train station. Relying on greenfield areas to continue to supply Sydney's housing needs is not sustainable.

### Percentage of homes in walkable vs non-walkable catchments



Note: Some local and strategic centres catchments overlap.

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## We need to focus housing supply in the 70% of developable Sydney that is already within walking distance to a centre.

Sydney's strategic and local centres present significant opportunities for growth. This is where we should be focusing on building new housing supply. While a lot of focus has been on growth in the outer or inner city rings, this research also shows that the Central River City offers a lot of potential if sites were to be unlocked for higher density housing. Understanding how much feasible capacity for development is available in Sydney's centres helps us determine the type of planning interventions required to unlock growth.





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## Not all centres are created equal, but key to making them better is to have more people living nearby.

It's not fair to compare Chatswood to St Mary's, because Chatswood has a much higher population that it services, meaning the level of offerings (types of shops, cafes etc.) is much higher.

Sydney's centres vary significantly in the mix of uses, density and diversity of activity. Not all centres are created equal.

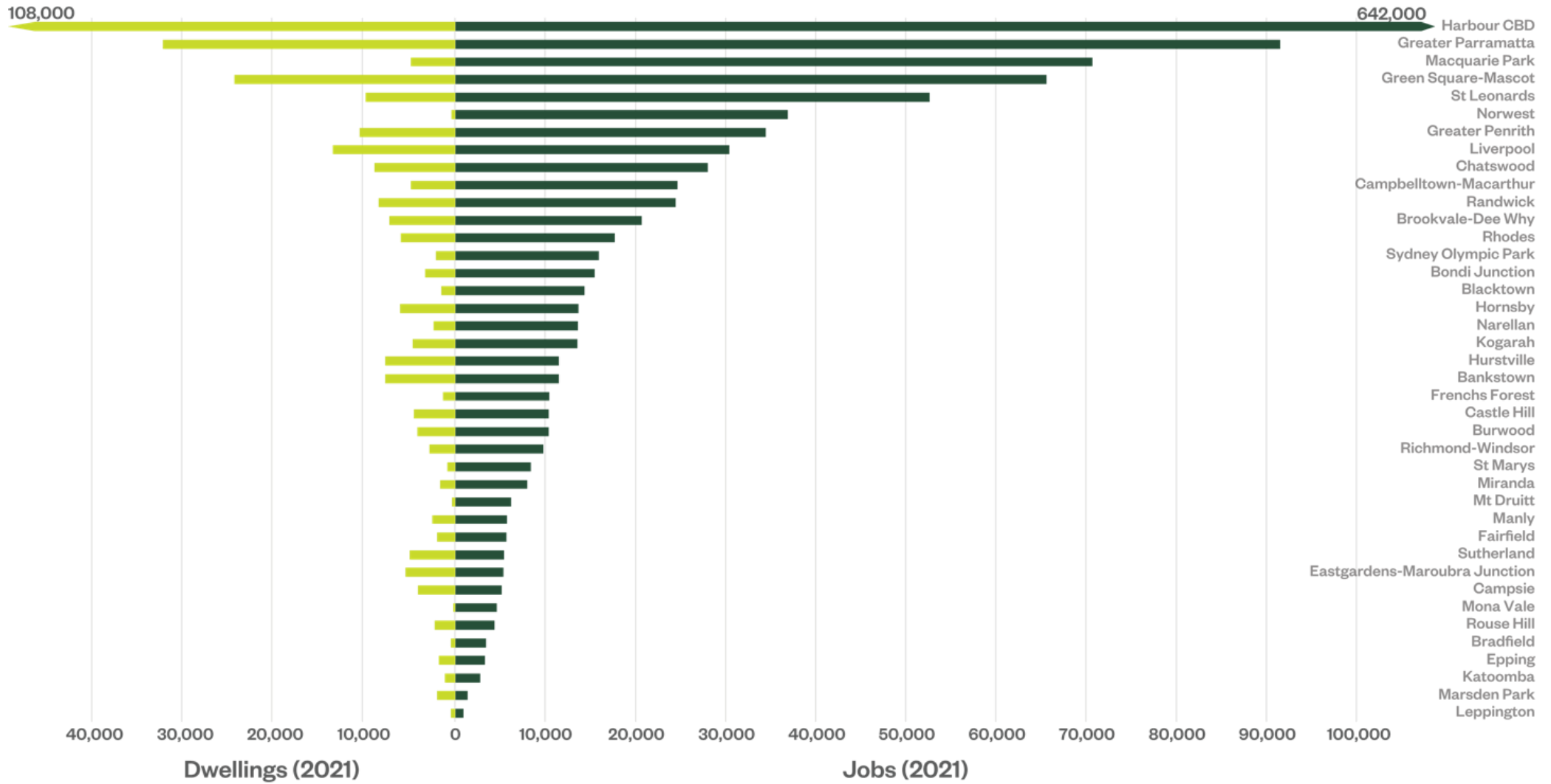
The key to better centres is to increase the number of people that can easily access them, ideally without needing to get in a car.

This can attract businesses and services that depend on a local customer base to succeed. Over time this can contribute to the vibrancy of centres and attract further investment in supporting public infrastructure.

It also generates jobs, providing more opportunities for more people to work closer to home.



## Balance of jobs and dwellings within the catchment of Sydney's strategic centres



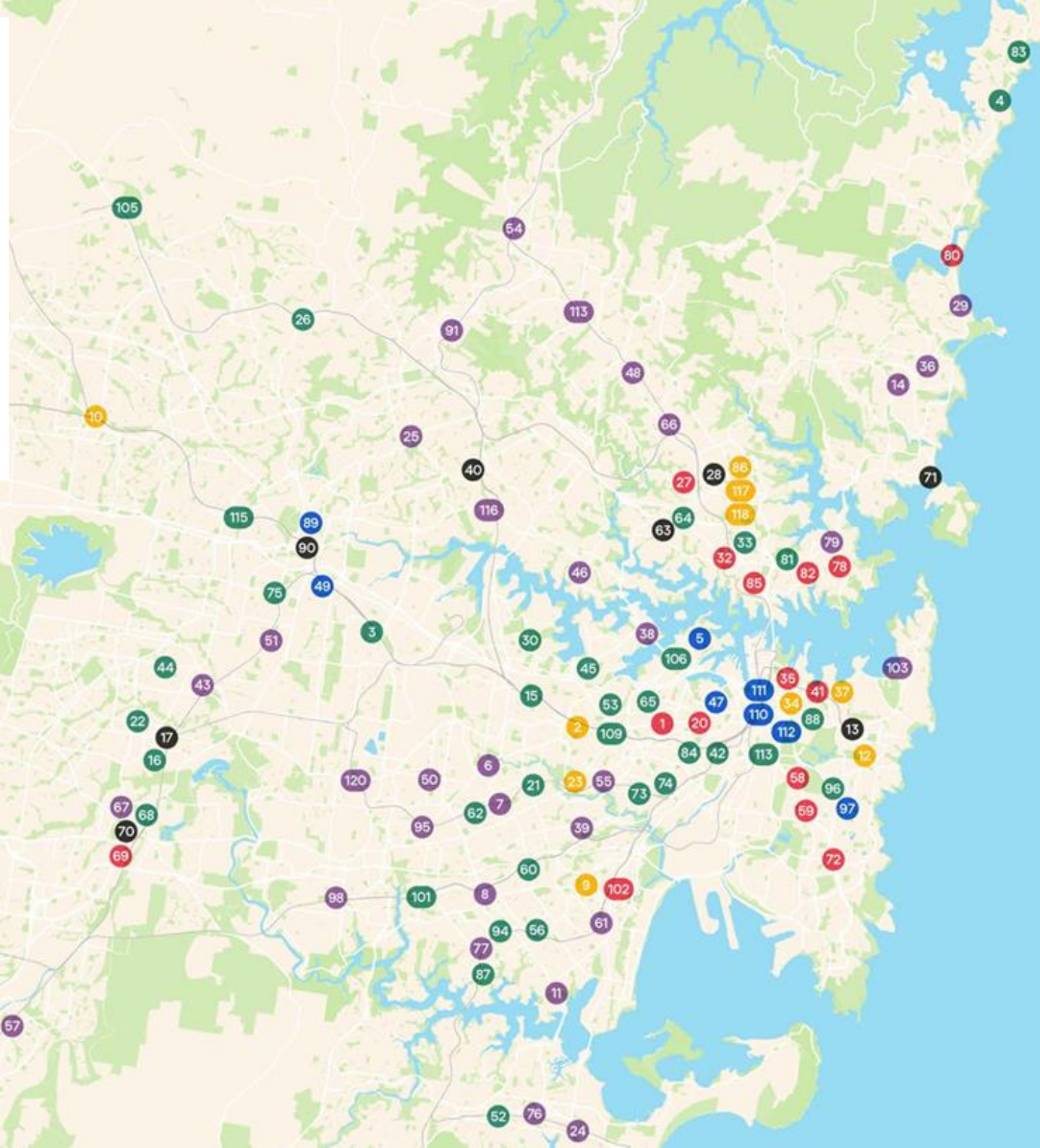
Source: Mecone analysis based on ABS 2021 census data

## At the heart of a great centre is a great high street

As we densify these areas, its important we make the centre function as well as possible. The Committee's 2021 work Mapping High Streets identified which centres needed more investment to improve their central street, and proposed ways to fix them.

### Street quality guide

- Pedestrian-only
- Great
- Good
- Fair
- Compromised
- Highly degraded



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As Sydney's population continues to grow, and we grapple with environmental, social and fiscal challenges we face, the best thing for Sydney is to densify.

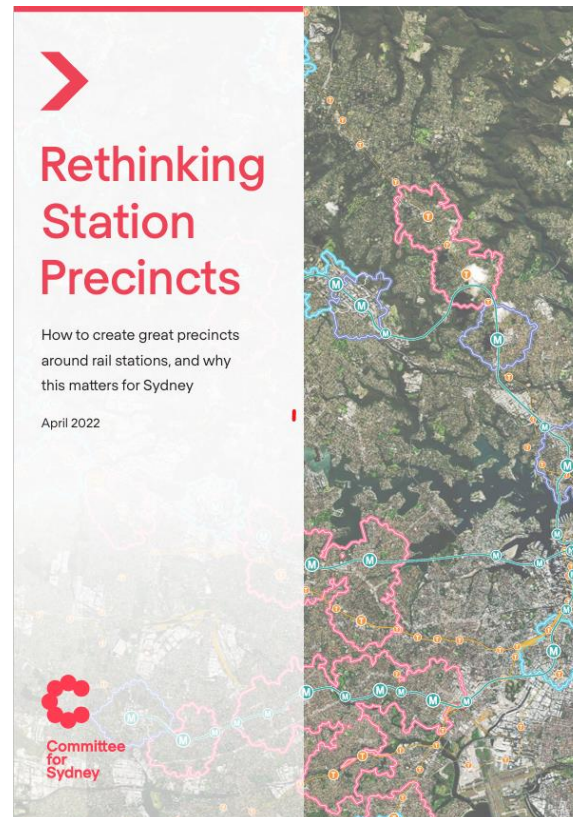
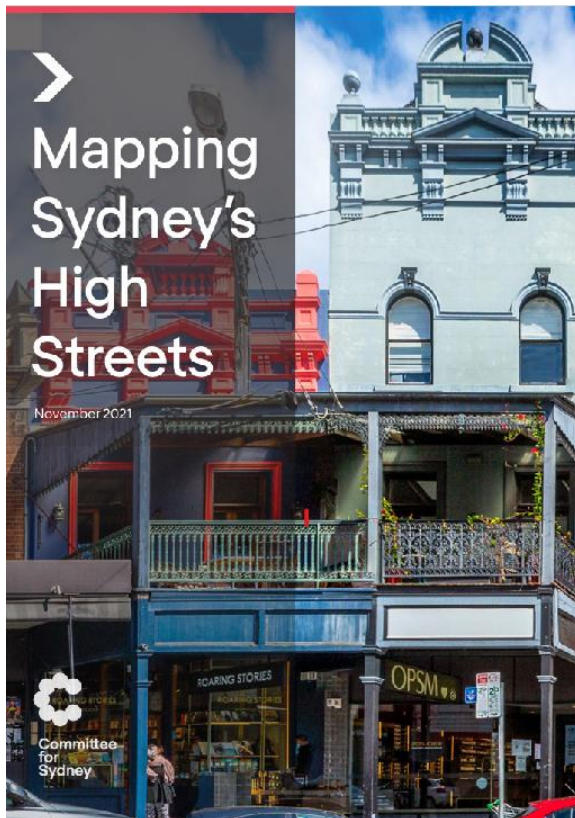
We need to focus on building more homes around all centres – both local and strategic, and not only around train stations.

In our 2016 Discussion Paper, *Density Done Well*, the Committee argued that Sydney can, and should, do density better.

We will continue to advocate for better density outcomes by examining the biggest barriers that get in the way of delivering highly liveable urban neighbourhoods.



## Further work from the Committee



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