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Small-area analysis and projections of social housing change

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Acronyms and abbreviations used in this report

ABS	Australian Bureau of Statistics
ACT	Australian Capital Territory
AHURI	Australian Housing and Urban Research Institute Limited
AIHW	Australian Institute of Health and Welfare
APM	Australian Property Monitor
ASGS	Australian Statistical Geography Standard
ATO	Australian Tax Office
CBD	central business district
CHO	community housing organisation
CPI	consumer price index
CRA	Commonwealth Rent Assistance
FOI	feature of interest
HAFF	Housing Australia Future Fund
NSW	New South Wales
NT	Northern Territory
OECD	Organisation for Economic Co-operation and Development
OSM	OpenStreetMap
POI	points of interest
Qld	Queensland
SA	South Australia
SA2	Statistical Area 2
SEIFA	Socio-Economic Indexes for Areas
SOMIH	state-owned and managed Indigenous housing
SUA	significant urban area
Tas	Tasmania
Vic	Victoria
WA	Western Australia

Glossary

A list of definitions for terms commonly used by AHURI is available on the AHURI website ahuri.edu.au/glossary.

Executive summary

Key points

- Historical patterns of social housing influence current stock numbers, location, estate form, condition and dwelling type, and reflect different jurisdictional policies over time.
- Social housing in New South Wales, Victoria, Western Australia and Queensland (and Australia as a whole) is below 5 per cent of total housing stock. While there has been an increase in social housing dwellings over the last 15 years, urban centres' share has declined.
- Moreover, at least 70 per cent of high-amenity areas in New South Wales, Victoria, Western Australia and Queensland contain less than 5 per cent social housing. To achieve 5 per cent social housing across all states and territories in the next decade would require 25,000 new units annually.
- Medium-density housing is over-represented in social housing stock by a factor of 2:1 compared to private housing. With high-density housing growing rapidly, it is becoming a typical typology for social housing.
- There is evidence of asset disposal in areas of high social housing concentration, but there is no link to new supply within areas of high local amenity. There is also evidence of divestment in high value, low-density areas and delivery in lower value areas.

Key findings

This research demonstrates the need for more social housing with good access to local amenities. It looks at recent trends in social housing provision and develops a locational amenity index to assess the current degree of fit between social housing and access to amenities in cities and significant urban areas throughout Australia. The sub-metropolitan analysis is premised on the assumption that different locations can have different outcomes for residents, and can require different investment, divestment and redevelopment strategies.

A note of caution is necessary here. Social housing provision should not be driven solely by opportunities for asset leveraging in capital cities. Attention needs to be given to the housing requirements and potential opportunities for social housing provision in regional areas, many of which, post-Covid-19, are experiencing growth equivalent to capital cities. A recent AHURI project concluded that there is a need for government action to 'unfreeze' rural and regional housing markets for social and affordable housing driven by a national urban and regional strategy (Beer, Baker et al. 2025).

Percentage of social housing households

Data from the Productivity Commission (2024) and the Australian Institute of Health and Welfare (AIHW) (2024a) show that, between 2011 and 2023, the number of social housing households in Australia grew from 404,000 to 423,000, while the total number of households increased from 8.4 million to 10.3 million. Despite this growth in absolute numbers, the proportion of social housing households relative to all Australian households declined from 4.8 per cent in 2011 to 4.1 per cent in 2023.

This reduction in social housing households is evident across all state capitals (e.g. Sydney −0.8%, Melbourne −0.6%, Perth −0.7%) and many rural centres (e.g. Mildura −1.7%, Albury–Wodonga −1.9%). While much of this is due to the rate of private construction exceeding social housing construction, it also points to a significant reduction in the capacity of the sector to provide for a growing population.

Some state capitals are close to or above the current national average of social housing households (i.e. 4.1%), but several are lagging, namely Melbourne (2.1%), Perth (2.7%) and Brisbane (3.1%). These figures vary at the state level (Vic 2.2%, WA 3.2% and Qld 2.8%), showing, variously, an alignment between rural and urban social housing in Victoria, the significant provision of rural social housing in Western Australia and Queensland's urban focus. The national average should not be seen as a benchmark, as it is well below most OECD countries and is also well below the national household poverty rate (13.4%). The latter provides some guidance as to the scale of difference between social housing dwelling provision and household need.

Optimisation of land assets

Despite the abundance of detached dwellings in Australia, social housing is over-represented in medium-density housing (defined here as townhouses and one- to three-storey units) by a factor of 2:1 compared to private housing in all major centres and most rural ones. This points to an optimisation of land assets for denser products.

This optimisation can also be seen in the rise of high-density (four-plus-storey) stock, which is particularly evident in Sydney, Melbourne and Brisbane. Ninety per cent of high-density stock in these cities has been developed since 2006: currently, 14 per cent of Sydney's social housing stock is high density; in Melbourne and Brisbane, these figures are 18 per cent and 6 per cent, respectively.

Brisbane and Sydney are divesting detached dwellings in favour of higher density units. Melbourne continues to invest in separate housing but is divesting medium-density units in favour of higher density ones. Analysis of ABS (2023) data has shown that all major cities are reporting similar densification trends. In relation to housing transfers, rural areas, particularly in New South Wales (Kempsey, Bowral, Coffs Harbour, Muswell and Nowra), are losing public (state) housing, either to community housing or to private sale, to the point where state-owned (or run) public housing will be depleted in 30 years.

Location of amenities

As part of this research, we created a nationwide amenity index to show the different levels of access to services at a neighbourhood level. This will enable policy makers and housing providers to explore the locational attributes of social housing and determine where it should, and should not, be located if best practice is to be followed.

While social housing investment appears to be moving to higher density areas, there is little indication that stock investment is moving to higher amenity areas. Arguably, this is the challenge for market and social housing: how to ensure that residents in areas of new development or redevelopment have access to quality amenities.

Recognition of this challenge has given rise to the concept of the '15-minute city' – that is, the idea that a resident's key amenity needs should be able to be met within 15-minutes, either by walking, riding a bike or using public transport (Moreno, Allam et al. 2021). Achieving anything close to this within Australia's low-density, rapid-growth cities is problematic. For social housing tenants, many of whom may not have a car, easy access to amenities can be especially important, particularly for those with complex needs who may require access to medical and other support services.

Our research indicates not only the need for more social housing but also that such housing must have good access to amenities. Increasing the availability of social housing provides opportunities to house more people in need. Ideally, the level of social housing would be such that a household requiring access to social housing within a defined area could be appropriately housed immediately.

Target

For this research, we assumed a relatively modest aspirational target of 5 per cent social housing as a proportion of total housing stock. Based on AIHW data for 2023 and estimating total housing stock levels, New South Wales, Victoria, Queensland and Western Australia fall below this target.

To achieve 5 per cent social housing in these states would require an additional 137,600 units at an estimated cost of A$69 billion. Meeting this target over the next decade would require investment to deliver 25,000 social housing dwellings per annum, assuming modest growth in private sector housing. Further, according to our research, 70 per cent of Statistical Area 2 (SA2) locations of high amenity have less than 5 per cent social housing. Therefore, there is a clear opportunity to increase supply in locations that would be most beneficial to tenants.

State and territory governments have invested significant funds to boost social housing numbers in recent years, but such efforts have not kept up with population growth. Divesting low-density social housing and leveraging the proceeds from private sale is one way to achieve growth, particularly in medium- and high-amenity locations where prices allow the leveraging of social housing.

Modelling

Our modelling shows how high-value, high-amenity SA2 areas could increase the total social housing supply by 20 per cent by selling 30 per cent of their low-density social housing to the private sector and redeveloping a further 30 per cent to medium-density social housing. Retaining social housing in high- and medium-amenity areas is preferable to the disposal of dwellings and delivery of new social housing in low-amenity areas. Our model is most appropriate for areas of high value uplift. A different model would be required for redevelopment or new development in low value uplift areas.

Data limitations

A national analysis of Australian social housing stock is hampered by inconsistent and insufficient data on both the volume and location of housing stock. AIHW and ABS data show considerable variation in relation to social housing. State-based features of interest and federal Australian tax records also fall short, particularly in terms of national coverage when compared to the non-government OpenStreetMap dataset for amenities. In the current data environment, and without federal datasets for both housing and amenities, a national assessment of location and trends will not be as accurate as working with state and community housing authorities, using state-specific amenity and service data, to assess current and future housing locations.

Policy development options

This research shows that social housing is not evenly distributed across, or within, states and territories and is not concentrated in areas of high amenity – that is, in areas with good access to public transport, schools, medical services, employment opportunities and leisure activities.

Currently, a large proportion of social housing assets exist in low-density, low-socio-economic areas. Because of the history of social housing provision, many of the current locations (formerly urban fringe) are now relatively high-amenity areas. There has been a degree of disinvestment of social housing in such areas, but relatively little investment in social housing in low-amenity areas.

Disinvestment of social housing in high-amenity areas makes sense in terms of maximising the development outcomes from the sale of existing assets; however, it does not make sense from the point of view of tenant wellbeing or future housing need.

Should agencies sell ageing assets, leverage assets in denser areas or wait for gentrification/densification to arrive?

Our research examined the currently popular, though contested, practice of leveraging greater stock increases by selling public housing assets in high-value areas to the private sector, and redeveloping social housing using the sale proceeds and funding from the federal government. This leveraging of existing public assets works best in high-amenity, high-value areas. Such areas are not (necessarily) the preferred locations for social housing investment (although appropriate future infrastructure policies could address that).

Our research suggests that medium-value areas could leverage around 20 per cent more social housing. Indeed, it is only low-value, low-amenity areas where such redevelopment would not work for this model. Of course, there are a number of issues with social housing redevelopment, not least of which is the temporary displacement of existing residents. Our analysis only looked at the redevelopment of low-density social housing; however, we believe it provides sufficient evidence to persuade policy makers to explore how to use existing assets to leverage new assets.

Our research shows that the strategic disposal of assets in higher value areas can result in an increase in social housing in lower amenity, generally lower value locations. While this may be strategic from a value proposition, relocating social housing tenants from high- to low-amenity areas is not strategic from a tenant wellbeing perspective, particularly in relation to the loss of community and existing relationships with support services.

Best-case scenario

The ideal situation would be one in which the disposal of low-density public housing assets delivered an increase in social housing assets of greater density *in the same location*. While this would involve temporary tenant displacement, any inconvenience would be offset by tenants ending up back in their original community.

As high-amenity locations increase in value, the opportunity to leverage existing low-density public housing also increases. Further, as such locations increase in density, the opportunity to redevelop low- and medium-density social housing into high-density options will likewise increase. These higher density options offer alternative social housing products, such as one- and two-bedroom dwellings, rather than low-density, detached dwellings.

The study

This study examined the changing patterns of social housing relative to urban context, typologies and ownership. It sought to provide insight into the locational aspects of social housing and the potential for utilising existing assets. Specifically, the research explored the neighbourhood characteristics of housing stock nationally using local attributes to indicate relative access to services, surrounding density and localised urban form.

The research used ABS data at the SA2 level (containing on average 10,000 people) to capture a neighbourhood. This was done for all significant urban areas across the country, including all state capitals, second-tier cities and regional centres. Additionally, an amenity index was created to show access to services locally. House price medians were used to calculate the potential value of local assets, the potential income from the sale of such assets and the cost of redevelopment across a range of scenarios.

Noting that there is an uneven distribution of social housing, and an ongoing reduction in market share, the research also assessed the volume of housing needed across all neighbourhood areas, particularly in areas of high local amenity, to increase and maintain a 5 per cent share of social housing.

1. Introduction

- **The volume of social housing stock in Australia is low by international standards, dropping in terms of market share and inconsistent across jurisdictional boundaries.**
- **The volume and location of social housing is changing due to divestment in older, high-maintenance stock; transfer to the community sector; rise of mixed-tenure models; leveraging of assets; and intentional stock reduction.**
- **Assessment of the strategic outcomes of these changes—across location, typology and volume—is necessary to plan for redevelopment in the future.**
- **The available data for social housing from the Australian Bureau of Statistics and the Australia Institute of Health and Welfare—especially covering urban areas at the national level—is inconsistent and contains errors.**
- **This report focuses on areas where social housing assets could be strategically leveraged, particularly in relation to local area attributes (such as access to services) and how these attributes vary across locations within Australian cities.**

This research explores net change in social (public) housing at a neighbourhood scale. It examines trends, concentrations and density of social housing relative to localised amenity and service access, showing how such assets could be used for redevelopment now and into the future to achieve better located dwellings. The analysis combines asset location data, median house price data and a new metric for local amenity, and performs a neighbourhood-scale review of all Australian urban areas to provide an overview of the distribution, access and value of social housing stock. The findings illustrate the uneven distribution of social housing stock across small areas (referred to as SA2 [Statistical Area 2]) in most cities, and the potential to utilise existing assets to deliver new stock in better located areas with a more even distribution than is currently the case.

1.1 A brief history of social housing

The bulk of Australia's social housing stock was built in the period 1946 to 1995. By 1996, there were approximately 362,000 social housing dwellings in Australia. Over the next three decades, only an additional 84,000 units were added, bringing the total to 446,000 in 2023–24 (AIHW 2024b).

Indicative of this legacy is the fact that, as of June 2023, the majority of social housing dwellings were separate houses (37%) or semidetached houses, townhouses and similar structures (27%). Despite the substantial disinvestment in lower density stock that has occurred in Australia in recent decades, flats, units or apartments account for only 35 per cent of current social housing stock (AIHW 2024b).

1.1.1 Jurisdictional differences

A sizeable minority of high-rise and walk-up apartments were built in Victoria and New South Wales; however, most social housing stock in these and other states took the form of low-rise estates of detached or semidetached housing. During the main period of social housing construction (i.e. 1946–95), the population of Australia was much lower than today: for example, Melbourne had 2.6 million people in 1971 compared to 5.3 million in 2024–25. Consequently, urban areas were much smaller. Social housing dwellings that were built on Melbourne's urban fringe are now located in built-up areas. The same is true of South Australia, where much social housing was built around Adelaide. In New South Wales, by contrast, social housing was built beyond the fringe (e.g. Liverpool) and it is only in recent years that such areas have become integrated into urban Sydney.

Most of the social housing stock built in the immediate postwar period was not designed for 'complex needs' households, but for low-income working families. This explains the location of social housing 'estates' in expanding manufacturing centres and regional areas that were also experiencing growth – for example, Victoria's La Trobe Valley (see Hayward 1996; Troy 2011). A noteworthy legacy of this history is that a good proportion of all social housing stock in Australia is now in high- to relatively high-value areas.

1.1.2 Advantages of early social housing

The early era of social housing provision (almost all public stock) had two great advantages over the present. First, the government played a proactive role in land ownership and land banking, which ensured that land was available for public housing. Second, much of the inner-urban areas of cities where public housing construction took place were run down, meaning that property acquisition was not expensive. The same areas today are prime locations with high amenity and property value, as evidenced by the increases in population and amenity through infill and consolidation policies (Glackin, Moglia et al. 2024).

1.2 Social housing target

In this report, we model the potential costs to achieve a target of 5 per cent social housing within local neighbourhoods. The figure of 5 per cent was chosen on the grounds that:

a. the scale of low-income housing need is so great that the current national average of 4 per cent and declining must be arrested

b. higher rates do not seem financially feasible in the current national and international context.

Achieving a target of 5 per cent social housing would require significant policy and funding reforms, including dedicated long-term funding mechanisms, such as the Housing Australia Future Fund (HAFF), that are not subject to electoral cycles. Additional measures may include:

- streamlined planning processes for social housing developments to accelerate delivery
- value capture mechanisms to help fund new acquisitions in areas experiencing rapid appreciation
- continuing partnership models with community housing providers to leverage their borrowing capacity.

The economic and social rationale for increasing existing social housing levels is compelling, with Nygaard and Kollmann (2023) estimating that 50,000 new social and affordable houses would create an additional A$5.4 billion in social and economic benefit over the next 22 years, including:

- reduced financial burden for individuals and families
- increased levels of support
- reduced risk of harm
- improved physical and mental health
- improved infrastructure of care for tenants/households with long-term complex needs (Muir, Powell et al. 2020; Nygaard and Salari 2025; Taylor, Johnson et al. 2023).

Social housing can be understood as providing a meaningful buffer and promoting community resiliency. At 5 per cent, it would enable government to better respond to economic shocks and housing stress while providing sufficient scale for efficient asset management. This figure would also enable a more strategic approach to urban renewal and place-based disadvantage to be developed, moving beyond isolated interventions to achieve broader community benefits.

Current stock disposal patterns appear to be working against this goal by reducing the level of social housing in established areas where land values and existing amenities are highest. A more nuanced approach that considers both immediate financial returns and longer term strategic value, particularly in locations showing early signs of gentrification or increasing amenity, is needed.

To this end, this research explores the ramifications of current investment/divestment business models at the neighbourhood level for the whole of Australia, and examines whether social housing is relocating to areas of better amenity, as best practice would advise.

1.3 Research questions

Four research questions drive the analysis:

- **RQ1:** What has been the small-area net public housing volume, form and locational change across capital cities and regional centres for 2006–21?
- **RQ2:** What is the current profile of public housing in terms of built form and location, in relation to amenity, socio-demographics and land value, and how has this changed in 2006–21?
- **RQ3:** What would be the locational and stock volume implications of adopting a uniform 5 per cent social housing target?
- **RQ4:** What can be expected in terms of land value, density and amenity across the cities and regions at a neighbourhood scale, and what are the optimised sell-off and retention rates to maximise benefit for the future?

1.4 Policy context

Australia's social housing sector, which is made up of public housing (historically the most important part) and community housing, is relatively small compared to other OECD countries, representing around 4 per cent of total housing stock. This contrasts with nations such as the Netherlands, Austria and Denmark, where social housing constitutes over 20 per cent of the housing sector, and the UK, where it accounts for 16.4 per cent of total stock (OECD 2024).

However, such direct comparisons may not be appropriate due to the distinct historical, social and political contexts that have shaped each country's housing policies (Pawson, Milligan et al. 2019). The volume of social housing has declined in 18 out of 25 OECD countries over the past decade, partly due to limited new construction and policies discouraging the provision of social housing, such as tenant purchases or conversions to market-rate rentals. However, countries like Iceland and Korea have increased their social housing stocks, and others, such as Scotland, Spain and France, are also rebuilding (OECD 2024).

Social housing policy in Australia operates within a framework of shared responsibility between federal, state and territory governments. State and territory governments are primarily tasked with delivering social housing services, either directly through public housing and/or state-owned and managed Indigenous housing (SOMIH), or by funding community housing providers (Productivity Commission 2024).

Social housing was initially designed to help low-income working families. It follows that it was *not* designed to meet the complex housing needs of today's social housing tenants. Various federal and state housing agreements have been reached over the years (e.g. Commonwealth State Housing Agreement, National Affordable Housing Agreement, National Agreement of Social Housing and Homelessness); however, these have not reflected the changing nature and role of social housing. Instead, the agreements have been structured to provide capital funding for new growth and recurrent funding to provide for day-to-day administrative costs, including program maintenance. The need for long-term maintenance – repairs, upgrades and replacement – has largely been neglected.

Tenant rents were meant cover a large proportion of recurrent funding. However, as tenant composition has altered over the years, rental income has fallen. Nearly all social housing tenants today are high-need, low-income households. At the same time, tenant costs have risen, and housing agreement funding has been diverted from capital funding to recurrent, including the cost of renewal and upgrades. Consequently, new growth in the sector has contracted to cover recurrent deficits (see Hall and Berry [2004] for more on the history of social housing funding).

The introduction of Commonwealth Rent Assistance (CRA) in the early 1980s compounded the public housing problem by providing CRA for community housing but not public housing. As a result, public housing agencies transferred stock to the community sector, making it the preferred provider for new social housing.

1.4.1 Housing crisis

The Australian Government has recognised that there is a housing crisis. Its preferred solution is to increase overall supply, primarily in the area of private market housing. The National Housing Accord has set a target of 1.2 million dwellings over five years from mid-2024 (The Treasury n.d.-a; n.d.-b). The vehicle of delivery, the HAFF, includes 20,000 new social homes and 10,000 affordable homes over five years, and prioritises vulnerable groups such as women and children fleeing domestic violence and veterans at risk of homelessness (Housing Australia n.d.-a). Other programs, such as the National Housing Infrastructure Facility, the Affordable Housing Bond Aggregator and the National Agreement of Social Housing and Homelessness Plan, along with state-funded social builds and redevelopment projects, will result in increased social housing. These programs employ different approaches and delivery schedules for reporting their housing plans, complicating efforts to create a comprehensive and comparable national overview. Notwithstanding these difficulties, Table 1 provides an assessment of the current status.

Table 1: Programs and the number of social homes/dwellings planned in Australian states and territories

State/territory	Programs and number of social homes/dwellings planned	Source
NSW	Aboriginal Housing Office programs: approx. 470 new social homes for First Nations residents by 2028 Community Housing Innovation Fund projects: approx. 530 social homes by 2026 Together Home Transition Program: 256 new social homes for rough sleepers by 2026 Social and Affordable Housing Fund: 156 social homes by 2024* Land and Housing Corporation major projects: 2,103 new social homes delivered by 2038–39 Regional homes: 100 new social homes by 2026 Social homes: 400 new social homes by 2026 Community housing provider partnerships: 350 new social homes by 2028 Social Housing Accelerator:1,500 social dwellings	The Treasury (n.d.-a)
Vic	Big Housing Build: 12,000 social and affordable homes over a four-year period from 2020 (9,300+ social homes) Social Housing Growth Fund: around 1,700 new social homes Regional Housing Fund: 1,300 new social and affordable homes in regional areas Social Housing Accelerator: 692–769 social dwellings Retiring and redeveloping all of Melbourne's 44 ageing high-rise public housing estates by 2051; currently, there are 10,000 inhabitants, and it is estimated that, after redevelopment, around 30,000 people will live across these sites	State Government of Victoria (2024), The Treasury (n.d.-a)
Qld	QuickStarts Queensland: 3,265 new social homes, all projects to be commenced by mid-2025 Housing Investment Fund: 5,600 social and affordable houses, all projects to be commenced by 2027 Queensland's Big Build: 2,000+ social homes, on average, every year from 2028: 53,500 new social housing homes by 2046 Social Housing Accelerator: 600 social dwellings	Queensland Government (2024), The Treasury (n.d.-a)
NT	Our Community. Our Future. Our Homes: 2,700 new homes in remote Aboriginal communities by 2034; 35 additional social housing dwellings by 2025 Social Housing Accelerator: up to 100 new social dwellings	Morgan (2024), Northern Territory Government (2019), The Treasury (n.d.-a)
WA	2,600 new social homes by 2030 (6% net increase) 2024–25 state budget: 4,000 social homes by 2027 Social Housing Accelerator: 598 social dwellings	Government of Western Australia (2023a; 2023b), The Treasury (n.d.-a)
SA	Social homes projected for completion by 2026: 1,025 Total commitments to public housing: 4,817 homes by 2026, including major updates and upgrades to existing homes Social Housing Accelerator: 230 social dwellings	Government of South Australia (2024), The Treasury (n.d.-a)
Tas	Additional 10,000 social and affordable homes by 2032 (2,000 by 2027) Social Housing Accelerator: 116 social dwellings	State of Tasmania (2023), The Treasury (n.d.-a)
ACT	Social and affordable dwellings per annum: 630 Social Housing Accelerator: 55–65 social dwellings	ACT Government (2018), The Treasury (n.d.-a)

Source: Complied by authors from sources identified in the Table.

**Note: This program commenced in 2023 and showed immediate gains for the following year (2024). No public data is available that provides an update on current status.*

As of June 2023, Australia had approximately 446,000 social housing dwellings (AIHW 2024b). These were predominately public housing (67%), followed by community housing (26%), Indigenous community housing (4.3%) and SOMIH (3.1%) (AIHW 2024b). The distribution of these dwellings largely reflects the population's geographic patterns, with most public and community housing situated in major cities. SOMIH and Indigenous community housing were more prevalent in very remote areas, highlighting the tailored approaches to addressing regional housing needs (AIHW 2024b).

Most social housing stock is concentrated in key metropolitan areas. Regions such as Melbourne's inner city and Sydney's Parramatta and inner south house the highest numbers of social dwellings (AIHW 2024b). These urban-centric trends reflect the emphasis on accessibility to services and amenities for tenants, with 91 per cent of National Social Housing Survey respondents reporting satisfaction with their housing's location in 2023 (Productivity Commission 2024).

Since the mid-1990s, the volume of social housing stock in Australia has fallen as a proportion of all housing stock, with the public sector experiencing both absolute and proportional decline (Groenhart and Burke 2014). Social housing stock reduced from 4.9 per cent of total stock in 1981 to 3.8 per cent in 2021, with a net gain of only around 122,000 public and community housing dwellings compared to 4.6 million private dwellings over the 20-year period (AHURI 2022). This contraction in the proportion of social housing stock is a product of reduced state and federal capital investment, and a related redirection of subsidies to demand-side assistance (Hall and Berry 2004; Pawson, Martin et al. 2016; Pawson, Milligan et al. 2013).

The volume of community housing has increased as a proportion of the sector, and the sector has diversified into new modes of leveraged development, such as mixed-tenure; however, the sum effect is a deficit of social housing relative to need that has been estimated at between 550,000 and 730,000 to 2036 (AHURI 2023; Troy, van den Nouwelant et al. 2019) and 940,000 to 2041 (van den Nouwelant, Troy et al. 2023).

1.4.2 Sector growth

Where growth has occurred over the last two decades (2006–21, the period of this research), it has been of a different form to earlier periods. Arthurson (1998) provides an in-depth analysis of the redevelopment of Australian public housing estates, focusing on the strategies used to address concentrated disadvantage and the implications for existing and future tenants. Arthurson (1998) highlights how redevelopment projects, often involving joint ventures with the private sector, have shifted the focus from new construction to the renewal of ageing stock. Thus, whereas the bulk of earlier growth was in reasonably large estates – whether high-rise, walk-up or detached – more recent provision has been by:

- spot purchase of individual dwellings
- redevelopment of smaller estates that are considered life expired
- redevelopment of what are seen as underutilised larger estates
- donations (e.g. community sector lands) or existing ownership by related organisations (e.g. church-owned land).

Overall, with the exception of some community housing examples, most growth has been on ageing – or what is sometimes called underperforming – public sites: in other words, sites with low densities and the ability to provide more housing stock.

There is now a sizeable literature on each of these forms of redevelopment. The key themes emerging from this literature are discussed below.

1.4.3 Social policy v. economic policy

Compared to the current period, the wave of redevelopment beginning in the mid-1990s and 2000s was more about social policy than economic viability – that is, it sought to minimise social housing concentration and disadvantage and create greater social mix by relocation and dispersal of tenants. Through intensified development of new stock, it also sought to change the tenure mix, including more ownership and private rental.

'Social mix' was a policy fashion of that era. It has somewhat fallen out of fashion as a rationale, most likely because the research literature suggests that socially motivated projects do not substantially reduce disadvantage. While, in the past, such policies produced some physical improvement in the housing stock, tenants were displaced, resulting in increased hardship and the loss of social connectedness (Arthurson 1998; Arthurson, Levin et al. 2015a; Hulse, Herbert et al. 2004; Stevens 1995). Some tenants felt disempowered; they had no voice and were not consulted in any meaningful way – a process that continues today (Arthurson, Levin et al. 2015b; Darcy and Rogers 2014; Wynne and Rogers 2020).

1.4.4 De-concentration

Consistent with early social policy objectives and later economic ones, virtually all redevelopment projects have resulted in the de-concentration of public housing estates. De-concentration is a relative concept. It does not necessarily mean a loss of actual stock. Rather, as redevelopment includes the provision of market housing, it means that the concentration of social housing tenants relative to other housing types and tenures is less concentrated. The inevitable outcome is no substantial social housing stock increase from the redevelopment process.

For the de-concentration process to effectively re-profile a site or estate, demolition and replacement of stock may be necessary. Sisson and Ruming (2024) critically analyse the system-wide impacts of such estate renewal on social housing supply in New South Wales. They develop a 'social housing accommodation deficit' to quantify the negative effects of tenant relocations and demolitions during estate renewal projects. Using case studies, they demonstrate that the redevelopment process often results in significant short- to medium-term deficits in social housing availability, despite eventual net increases in supply. Their work critiques the reliance on mixed-tenure models and calls for alternative approaches, such as prioritising early delivery of social housing units and exploring non-demolition-based renewal strategies.

1.4.5 Shift to value uplift

Social housing redevelopments in the 1990s to 2000s did not necessarily rely on value uplift as a driver. Given that they had social policy objectives as much as economic ones, many redevelopments were in locations of relatively poor amenity and value, for example, Campbelltown and Macquarie Fields in New South Wales, or West Heidelberg in Victoria. However, as Nygaard and Pinnegar (2021) observe, successive renewal programs from the 2000s began a gradual evolution to policies that emphasised an 'unlocking' of site-specific value tied to changes in land values.

Nygaard and Kollmann (2023) point to the central role of land value in policy making, noting that public housing urban renewal is increasingly driven by asset-based viability considerations and reduced government exposure to risk. This means that other social and economic objectives, as well as those relating to urban form, may be undervalued. One of these is arguably the need for greater public engagement – that is, the involvement of tenants and the wider public in decision-making around projects. Another is the disjuncture between supply driven by uplift, and supply required by need.

Many of the areas of greatest social housing need are in outer-urban and regional areas, which have limited value uplift and poor amenity. Australia is not unique in this regard. Morrison (2017) examines asset disposal strategies within English housing associations, categorising organisations based on their approach to selling or retaining high-value properties. While asset disposal generates financial flexibility, Morrison raises concerns about socio-spatial inequalities and the potential erosion of social housing stock.

1.4.6 Public private partnerships

Related to the greater dependence on value uplift, the use of public private partnerships (PPPs) has become central to redevelopment and development. The first social housing PPP in Australia (Bonnyrigg NSW) was a failure, with the private developer going into receivership. In addition to issues of private risk, PPPs are problematic for a number of other reasons, including their limited ability to increase social housing numbers. Social housing PPP redevelopments rarely exceed a 10 per cent increase in social housing (and sometimes result in a loss of bedrooms), meaning that the bulk of additional stock will be full market housing. Such schemes come with a loss of public land to the private sector, closing down options for further growth on such sites (Taylor 2017, Wynn, Ruming et al. 2022, Porter, Kelly et al. 2023).

A further criticism concerns the apparent privatisation of public stock and land associated with PPPs when the developer is a community housing provider (CHP) or consortium led by a CHP. Some lobby groups have never accepted not-for-profit (NFP) CHPs or associated consortia as legitimate providers of social housing, and argue that the loss of stock to them via transfer or PPP is privatisation. This is despite CHPs using the same or similar waitlists, eligibility criteria and household rent settings as other providers (Shaw 2017, Porter, Kelly et al. 2023).

Privatisation concerns would be relevant if the PPP meant that the title was being transferred to the CHP; however, this is negated, as in the case in Victoria, by the development of ground lease partnerships, whereby NFP providers or consortia are responsible for the financing, design, construction and operation of any development, including tenant and asset management for 40 years, after which the land, and all homes, revert to public ownership. This means that there is no sale or long-term loss of public land (Homes Victoria 2024).

Milligan, Hulse and Davison et al. (2013), in an exploration of the leadership and organisational strategies of NFP housing providers in Australia, draw attention to the increasing reliance on market-oriented approaches and raise questions about social outcomes; however, any such criticisms also apply to public agencies intent on capturing site value.

While mixed-tenure and urban renewal programs are part of the suite of novel approaches to contemporary social housing delivery, limited client decanting capacity, community preservation and the need for housing options in all areas of the city means that most stock remains static or is simply sold or transferred to community housing organisations.

The majority of social housing properties are ageing and are in established suburbs. As the emphasis on value uplift illustrates, this fact has long been recognised by existing redevelopment programs. Keating (2000) critiques the displacement and socio-economic impacts of redevelopment projects, emphasises the importance of meaningful resident participation in planning processes and advocates for retaining public housing assets to avoid exacerbating social inequalities.

1.5 Research methods

Data for this project were drawn exclusively from:

- the Australian Bureau of Statistics (ABS) – to show public and private housing volume and typology change
- OpenStreetMap (OSM) – to show access to services and levels of local amenity
- Australian Property Monitors (APM) SA2 aggregated median valuation data collected via the Australian Urban Research Infrastructure Network (2024) – to explore valuations
- Australian Institute of Health and Welfare (AIHW) – to provide greater accuracy on social housing supply.

A brief by AIHW (2024c) on the quality of ABS data, particularly as they relate to social housing, stated that issues such as self-reporting, incomplete data and incompatible data categories creates considerable disparity between AIHW and ABS data. The brief also noted disparities and inconsistencies in AIHW's own data, which are supplied by state and community organisations – namely that they are often partial and recorded differently in each jurisdiction.

It follows that there is no national dataset that is absolutely accurate. As discussed in Chapter 6 of this report, AIHW figures, which are considered the industry standard and of superior quality to ABS figures, are roughly 20 per cent higher than ABS figures. However, AIHW figures lack the granularity needed for local area assessment of access to services. By contrast, ABS figures do allow for this and are also consistent across all cities and significant urban areas (SUAs), making them more practical for a national assessment of housing and geography.

While not perfect, ABS data show concentrations of social housing and were previously used to create a virtual dataset of social housing locations for a separate AHURI project (Khor, Taylor et al. 2023) that was validated as accurate by housing authorities in Melbourne, Sydney and Brisbane. Therefore, ABS data are used for geographical analysis and to show trends of change in this research. Although such figures may be underreported, they nevertheless show proportional difference per location and time.

To show the rate of change in housing stock (public and private), as well as the change in housing typologies, the research used census data from the ABS. The time series was limited to the census periods that are completely digitised and available on the ABS online TableBuilder system (ABS 2023) – that is, 2006–21. The focus was on counting dwellings.

The variables selected from each census included:

- dwellings structure – a classification of the built form, including separate dwellings, detached dwellings and townhouses
- landlord type – a classification of the tenure, including private ownership, private rental, public (state-owned) rental and community housing provider rental, the last two being social housing.

When combined, these tables show the volume and number of dwellings of different built forms, plus the share of social housing (public and community) for each typology.

To capture a national perspective, the ABS geography of SUAs was used as the first tier of analysis. This geography covers all urban areas in the nation, including state capitals, second-tier cities and large regional towns. However, while providing a high-level assessment of each city and town, it does not provide the level of detail required to show movement of stock in larger cities.

The ABS geography of SA2s – that is, areas that have an average population of roughly 10,000 people and represent 'a community that socially and economically interacts' (ABS 2024b) – was used to dive deeper into the data to capture local area changes in the urban fabric and social housing over the study period. Due to population change between 2006 and 2021, SA2 boundaries have changed. To accommodate this, all data were captured in 2021 SA2 boundaries.

The locational assessment of housing was performed across three variables.

1. The ABS Socio-Economic Indexes for Areas (SEIFA) was used to show the relative socio-economic advantage and disadvantage of locations.
2. The density of the location was assessed as a key indicator of access to services. This variable used ABS dwelling counts per SA2 and their change over 2006–21 to show existing and changing contexts.
3. The creation of an amenity index using OpenStreetMap. The full methodology and rationale for this data choice is discussed in Chapter 4.

The analysis of property price trends across SA2 regions used APM Timeseries Property Data (March 1994 – July 2024) – that is, monthly aggregated property data organised using Australian Statistical Geography Standard (ASGS) 2016 SA2 boundaries.

The data underwent multiple processing steps, including:

- mapping SA2 regions to SUAs
- adjusting for inflation using capital city consumer price index (CPI) data (based on 2024 figures)
- interpolating missing values
- removing implausible entries.

To align with other data assets used in the analysis, the ABS's 2016–21 ASGS Correspondences were applied, converting property data from 2016 to 2021 SA2 boundaries using appropriate scaling ratios. The processed data enabled longitudinal analysis across census years (2006–21), with SUA-specific quintiles calculated using Jenks natural breaks methods for robust cross-regional comparisons.

To assess the distribution of social housing across SA2s, we used ABS data combined with the amenity index to identify the proportion of social housing in high-, medium- and low-amenity SA2s. We assessed the distribution of social housing stock and social housing growth over time against the benchmark of 5 per cent, identifying SA2s where social housing was well above and below the benchmark. We were then able to assess at a state and SA2 level the volume of social housing required per annum over a 10-year period to meet the 5 per cent benchmark.

The research also examined how SA2s can leverage low-density social housing to deliver additional social housing dwellings. As detailed in Chapter 6, we analysed how much additional social housing could be generated through the disposal of a proportion of existing, low-density social housing stock and the development of new, medium-density social housing. To do this, we relied on ABS data on social housing stock and type, APM data on house prices and made assumptions around construction costs and available funding subsidies.

2. The spatial and structural characteristics of social housing

- **There have been modest increases in social housing across most major centres, but the market share of public to private is dropping.**
- **Melbourne, Perth and Brisbane have low proportions of social housing.**
- **Medium-density housing is significantly over-represented in social housing in all cities, but higher density (four-plus-stories) social housing is growing.**

This chapter provides an overview of social housing volume, form and locational change across capital cities and regional centres in the period 2006–21. Data for this chapter are presented for all significant urban areas (SUAs), as defined by the Australian Bureau of Statistics (ABS).

2.1 The national context

Between 2011 and 2023, the number of social housing households in Australia grew from 404,000 to 423,000 (AIHW 2024b), while the total number of households increased from 8.4 million to 10.3 million (Productivity Commission 2024). Despite this growth in absolute numbers, the proportion of social housing households relative to all Australian households declined from 4.8 per cent in 2011 to 4.1 per cent in 2023 (AIHW 2024b). From June 2014 to June 2023, the proportion of social housing households varied across states and territories (AIHW 2024b). In 2023, the share of social housing was below 5 per cent in the four largest states:

- New South Wales: 4.6 per cent (down from 5.0% in 2014)
- Victoria: 2.8 per cent (down from 3.5% in 2014)
- Queensland: 3.6 per cent (down from 3.8% in 2014)
- Western Australia: 4.1 per cent (down from 4.4% in 2014).

From 2006 to 2023, the number of public housing dwellings decreased by 43,000, while community housing stock nearly quadrupled, rising from 30,100 to 114,000 dwellings (AIHW 2024b). This shift in housing tenure is partly attributed to policy changes, with some public housing stock being transferred to the community housing sector, which is growing through partnerships with governments and the private sector to increase affordable housing supply (Productivity Commission 2024).

Geographically, social housing is predominantly located in urban centres, with 76 per cent of public housing and 66 per cent of community housing in major cities. Indigenous housing is more likely to be found in very remote areas, with 33 per cent of state-owned and managed Indigenous housing and 47 per cent of Indigenous community housing located in these regions (AIHW 2024b).

In terms of dwelling types, public housing is most commonly made up of separate houses (37%), flats, units or apartments (35%), and semidetached houses (27%). Over the past decade, the number of flats, units and apartments in community housing has more than doubled, from 25,600 in 2012 to 53,800 in 2023. Public housing dwellings tend to have two or three bedrooms, while community housing and Indigenous community housing are more likely to be one- or two-bedroom dwellings (AIHW 2024b).

Location-related needs of tenants have largely been met, with high satisfaction reported across access to public transport, parks and schools from public housing tenants, and access to hospitals, parks and shops for community housing tenants (AIHW 2024d). Indigenous housing tenants also report high satisfaction with access to schools, hospitals and recreational facilities (AIHW 2024d).

Despite these positive outcomes, the sector faces significant challenges, including growing waiting lists and the ongoing redevelopment of estates, which reduces the immediate availability of public housing. This has contributed to a perception of public housing estates as deteriorating, often reinforced by media and policy narratives that stigmatise tenants and justify urban renewal (Porter, Davies et al. 2023). The dynamics of urban land value play a critical role in these changes, influencing patterns of gentrification and displacement (Pawson and Pinnegar 2018; Slater 2018).

2.2 Social housing volume analysis

This section sets out the SUAs of each state separately. Social housing refers to both public and community organisations that are then broken down into their separate categories. This represents a high-level picture of housing volumes that, particularly in the larger cities, will mask the movement of assets. This will be dealt with at the finer level of work as the research moves into Statistical Area 2 (SA2). All data in this section show partial SUA tables for each state.

Table 2 shows select SUAs in New South Wales, their existing social, public and community housing, and the rate of change. The proportion of social housing to total housing across New South Wales varies considerably. While Sydney sits close to the national average (3.9%), some areas, such as Nowra (7.5%) and Wollongong (6.1%), have far higher volumes, and some areas, such as Camden (0.8%) and Morisset (0.9%), have far less market share.

In terms of change over the 2006–21 census years, less than half of the state's urban areas showed social housing increases. Notable percentage increases were Broken Hill (21.8%), the Central Coast (10%), Forster (12.4%), Morisset (24.7%), Port McQuarrie (15%) and Ulladulla (25.2%). Other than the Central Coast, these were all from a low base, with volume increases being in the larger cities: Central Coast (+407), Newcastle (+248) and Sydney (+355). The largest percentage losses were in Dubbo (–8.4%), Griffith (–11.7%), Kempsey (–19.8%), Medowie (–49.1%) and Wagga Wagga (–18%), with the biggest volumetric decreases being Wagga Wagga (–245) and Wollongong (–254).

In terms of the division across public and community housing, all but two areas showed decreases in public housing, typically with increases across the community sector, indicating transfers accompanied by additional community housing development/purchasing. However, some areas saw a deficit between reductions in public and increases in community housing (Kempsey, Wagga Wagga, Wollongong), indicating significant volumes of stock either reaching the end of their useful life or land sales.

As expected from an environment where private housing volumes are increasing at a far higher rate than public/community housing, the market share of social housing dropped in almost every urban area, the exception being Broken Hill, which increased its share by 0.2 per cent. The areas with the highest reductions in market share generally still maintained a share above the national average. Some areas remained unchanged, due to changes in social stock being accompanied by low volumes of new private development.

Table 2: New South Wales social housing in select SUAs

	2021				2006–21 change				
Significant urban area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Armidale	510	5.0	309	201	44	9.4	–83	127	–0.4
Bowral	504	2.8	230	274	43	9.3	–153	196	–0.5
Broken Hill	190	2.0	119	71	34	21.8	3	31	0.3
Camden	70	0.8	32	38	4	6.1	–12	16	–0.1
Central Coast	4,491	3.0	3,365	1,126	407	10.0	–228	635	–0.1
Coffs Harbour	1,253	4.0	789	464	–31	–2.4	–369	338	–1.1
Dubbo	762	4.6	580	182	–70	–8.4	–165	95	–1.9
Forster	362	3.0	180	182	40	12.4	–41	81	0.0
Griffith	376	4.7	289	87	–50	–11.7	–71	21	–1.9
Kempsey	360	6.0	166	194	–89	–19.8	–151	62	–2.6
Medowie	29	0.5	16	13	–28	–49.1	–10	–18	–0.6
Morisset	106	0.9	57	49	21	24.7	29	–8	0.0
Muswellbrook	305	5.6	230	75	–51	–14.3	–109	58	–2.7
Newcastle	10,116	4.8	8,087	2,029	246	2.5	–1,165	1,411	–1.0
Nowra	1,179	7.5	626	553	31	2.7	–373	404	–1.7
Port Macquarie	872	3.7	361	511	114	15.0	–278	392	–0.4
Sydney	73,731	3.9	58,099	15,632	3,555	5.1	–6,105	9,660	–0.8
Ulladulla	259	2.8	107	152	52	25.1	–53	105	0.0
Wagga Wagga	1,092	4.5	900	192	–245	–18.3	–379	134	–2.1
Wollongong	7,561	6.1	6,807	754	–254	–3.3	–626	372	–1.5

Source: Author derived from ABS Census data, landlord type, 2006 and 2021. Note on column headings: '2021' refers to census data date; 'Social' is the number of social (public and community) dwellings; 'Social %' is the market share social housing achieves in that SUA; 'Public' is state-owned housing; 'CHO' is community managed housing; '2006–21' is the difference between 2021 and 2006; 'Social share' is the difference in market share between those periods.

The future sustainability of stock transfers to incentivise community housing varies per locality. Taking the first location in Table 2, Armidale lost 20 per cent of its public housing over 15 years. If those rates continue, and assuming title transfers, this means that there is 60 years of stock transfers remaining before the supply of public land becomes zero. This is indicative of the potential scale of the issue, particularly when we look at areas like Kempsey, Bowral, Coffs Harbour, Muswell and Nowra, which have roughly 30 years of supply remaining.

The proportion of market share across all SUAs, shown in Table 3, is slightly more balanced in Victoria. However, Victoria's two largest cities (Melbourne 2.1%, Geelong 2.7%) have far less social stock as a proportion of the private market than their NSW counterparts (Sydney 3.9%, Newcastle 4.9%). The proportion of urban areas that have shown an increase in social housing in 2006–21 is also less than New South Wales, at just over one-third of locations, as opposed to half. While there appears to be a trend of transfer to the community sector, it is not as pronounced as in New South Wales. Further, the incidence of deficit between a reduction in state assets and increase in community is more pronounced, occurring in half of the SUAs, indicating sale of assets rather than transfer.

The reduced increase in the community sector could flow from the lack of leverage generated by reduced transfers. However, the increase in community housing in Melbourne, as a ratio of reduced public housing, is significantly higher, indicating that the community sector is potentially less reliant on transfer to deliver its new housing. As in New South Wales, there has been a general reduction in market share due to the variation between public and private investment, potentially due to dramatic population increases over the period.

Table 3: Victoria social housing in select SUAs

	2021				2006–21 change				
Urban area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Albury-Wodonga	1,835	4.3	1,577	258	−188	−9.3	−322	134	−1.9
Ballarat	1,774	3.6	1,421	353	58	3.4	−127	185	−1.3
Bendigo	1,724	3.9	1,362	362	−1	−0.1	−97	96	−1.4
Geelong	3,407	2.7	2,624	783	158	4.9	−144	302	−0.9
Melbourne	41,988	2.1	34,013	7,975	2,924	7.5	−1,293	4,217	−0.6
Mildura	895	3.9	692	203	−127	−12.4	−184	57	−1.7
Moe	544	5.2	456	88	−32	−5.6	−56	24	−0.5
Shepparton	1,040	4.8	820	220	21	2.1	−74	95	−1.3
Traralgon	775	3.9	617	158	−94	−10.8	−179	85	−1.2
Wangaratta	436	4.8	367	69	−45	−9.4	−56	11	−1.7
Warragul	297	1.7	266	31	10	3.5	−12	22	−1.0
Warrnambool	704	4.4	574	130	−5	−0.7	−54	49	−1.2

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

As with Victoria, the largest city in Western Australian (from Table 4) has lower than the national average market share (Perth 2.7%), though the state also contains some of the highest rates of social housing, particularly in the north (Broome 13.9%, Port Hedland 9.7%). The share of community housing is roughly the same as in New South Wales (22.1%) and Victoria (19.2%), at 18.3 per cent. Only four of the 10 areas have seen reductions in social housing, with significant increases (10–45%) in the others. Only two areas (Geraldton and Kalgoorlie), show a significant deficit in public housing decreases to community increases. Due to the reduced level of decreases in public housing, the data could indicate that sale and/or transfer is not as common in Western Australia, potentially indicating a more stable market or one focused on retaining stock and new development, rather than redevelopment. However, the significant divestment in Geraldton and Kalgoorlie shows there are exceptions, and each locality may present its own particular strategic approach.

Table 4: Western Australian social housing in SUAs

	2021				2006–21 change				
Urban area	Social	Social %	Public	CHO	Social	Social%	Public	CHO	Social share
Albany	870	5.5	600	270	175	25.2	2	173	-0.2
Broome	812	13.9	730	82	174	27.3	124	50	-3.0
Bunbury	1,214	3.8	915	299	343	39.4	111	232	-0.1
Busselton	579	2.8	489	90	60	11.6	-7	67	-1.3
Esperance	250	4.4	198	52	-30	-10.7	-43	13	-2.0
Geraldton	644	3.8	532	112	-169	-20.8	-237	68	-2.6
Kalgoorlie	611	4.9	539	72	-114	-15.7	-127	13	-1.5
Karratha	482	6.7	459	23	-7	-1.4	-21	14	-4.5
Perth	23,143	2.7	18,859	4,284	2,129	10.1	-274	2,403	-0.7

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

The proportion of social housing to total housing market share across Queensland, in Table 5, is shown to vary greatly, and is particularly lacking in tourist areas, such as Airlie Beach (1.9%), the Gold Coast (1.8%) and the Sunshine Coast (1.8%). The community housing share is slightly lower than in New South Wales, Victoria and Western Australia, at 16.5 per cent. Queensland shows near universal social housing increases, with Kingaroy as the only exception. The areas with highest increases are generally in tourist areas with low-market share, though Bundaberg (24.3%) and Cairns (14.3%) also show considerable growth. As with Western Australia, public stock appears to be more static, though the second-tier cities of Gladstone, Rockhampton and Townsville do appear to be going through reasonably major stock transfers to community housing.

Table 5: Queensland social housing in select SUAs

	2021				2006–21 change				
Urban Area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Airlie Beach	105	1.9	73	32	47	81.0	33	14	0.5
Brisbane	29,679	3.1	25,179	4,500	2,413	8.8	293	2,120	-0.8
Bundaberg	1,211	3.8	977	234	237	24.3	101	136	0.0
Cairns	2,338	3.6	1,917	421	293	14.3	39	254	-0.4
Gladstone	829	4.1	645	184	33	4.1	-76	109	-1.3
Gold Coast	5,476	1.8	4,309	1,167	731	15.4	258	473	-0.2
Hervey Bay	656	2.5	514	142	116	21.5	63	53	-0.4
Kingaroy	119	2.6	99	20	-4	-3.3	-1	-3	-1.3
Mackay	1,377	3.9	1,153	224	10	0.7	-18	28	-1.2
Rockhampton	1,360	4.1	1,050	310	17	1.3	-57	74	-0.9
Sunshine C.	3,020	1.8	2,569	451	476	18.7	249	227	-0.2
Toowoomba	1,526	2.6	1,266	260	221	16.9	100	121	-0.3
Townsville	3,009	4.0	2,594	415	165	5.8	-69	234	-1.1

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

Other than Victor Harbor, urban areas in South Australia (Table 6) all have a higher proportion of social housing than the national average, with Adelaide having 5.3 per cent of total stock, the second highest of all capital cities. However, again with the exception of Victor Harbour, all urban areas saw significant reductions in the number of social dwellings, from 13 per cent in Adelaide to 25.2 per cent in Port Augusta. This was evidenced by large reductions in public housing (–8,526 just for Adelaide), with only marginal transfers to community housing. Total reductions for state housing over the period were –9,799, compared to increases in the community sector of only 3,580, making for a considerable deficit. Though most likely a temporary policy change relating to asset optimisation, this also highlights that, at these levels of change, there are less than 60 years of transfers remaining. Irrespective, South Australia's community share of social housing is high, at 23.7 per cent.

Table 6: South Australian social housing in select SUAs

	2021				2006–21 change				
Urban area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Adelaide	30,597	5.3	22,666	7,931	–4,895	–13.0	–8,256	3,361	–2.0
M. Gambier	895	6.6	797	98	–270	–23.2	–280	10	–3.9
Murray B.	553	6.7	479	74	–146	–20.9	–199	53	–4.5
Port Augusta	675	10.9	611	64	–228	–25.2	–229	1	–5.2
Port Lincoln	524	7.1	478	46	–124	–19.1	–142	18	–3.4
Port Pirie	631	9.2	569	62	–125	–16.5	–165	40	–3.2
Victor H.	261	1.4	101	160	59	29.2	–7	66	–0.1
Whyalla	1,554	14.2	1,508	46	–490	–24.0	–521	31	–6.2

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

All Tasmanian urban areas (Table 7) have above national average share of social housing. Other than Launceston (–4.2%), all areas have increased, though Burnie only marginally. Devonport is the only area to show increases in both public and community housing, and one of the few nationally to actually increase market share. The only deficit in public to community transfer occurred in Launceston. Community organisations hold a 23.9 per cent share of the social housing market.

Table 7: Tasmania Social Housing by SUA

	2021				2006–21 change				
Urban area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Burnie	1,029	7.9	817	212	1	0.1%	–153	154	–1.4
Devonport	1,266	8.9	1,019	247	236	22.9%	36	200	0.2
Hobart	5,567	5.8	4,362	1,205	433	8.4%	–311	744	–0.7
Launceston	2,105	5.3	1,371	734	–92	–4.2%	–692	600	–1.1
Ulverstone	405	6.0	321	84	28	7.4%	–48	76	–0.1

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

With only three major cities between them, the Northern Territory and the Australian Capital Territory have been combined into Table 8. Both cities in the Northern Territory have above the national average share of social housing, with Darwin having the highest of all Australian capital cities at 5.8 per cent of all stock. Alice Springs saw an increase in social housing over the period, while Darwin saw a decrease. Public housing expanded in Alice Springs and contracted in Darwin, while the reverse occurred in community housing, indicating two quite distinct contexts: one increasing market share by 0.4 per cent, which is rare; and the other reducing it by 2.8 per cent, which is a very high proportion for a capital city. While this presents an overview of housing in the Northern Territory, given the high volume of rural social housing this should be taken as an overview of the urban assets only. The community organisation share of urban assets is the lowest nationally at 10.8 per cent.

Canberra's above average market share of social housing (11.6% community organisation share of social housing) appears to be growing via stock transfers and leveraging of new stock. Canberra's market share dropped by 2 per cent over the 2006–21 period.

Table 8: Northern Territory and Australian Capital Territory social housing by SUA

	2021				2006–21				
Urban area	Social	Social %	Public	CHO	Social	Social %	Public	CHO	Social share
Alice Springs	959	9.3	819	140	131	15.8	182	–51	0.4
Darwin	2,931	5.8	2,647	284	–248	–7.8	–370	122	–2.8
Canberra	10,432	5.2	9,222	1,210	87	0.8	–729	816	–2.0

Source: Author derived from ABS Census data, landlord type, 2006 and 2021.

2.3 Typology analysis

This section explores changes in the typologies of social housing. The aim here is to illustrate how stock is changing, to see if social housing is becoming denser, to locate where this is occurring and to begin creating areas for research focus – that is, to identify areas of potential stock and valuation increase to leverage sectoral growth. Unlike the previous section we will only use partial tables, indicating types of change.

Data for this section have been categorised to show separate dwellings, attached dwellings and units up to three storeys, and apartments of four stories or greater. This has been done to both accommodate methodological changes on typology capture within the ABS for the period 2011–16 and to show indicators of low, medium and high density.

Table 9 has been sorted by the proportion of high-density units and then medium-density units. Only areas with 1 per cent or greater of higher density units have been included, indicating at least modest market acceptance of apartments and showing where less dense social stock could be optimised or leveraged. Areas with less than 1 per cent are, for this research, deemed not viable for higher densities in the near future. However, and as an indicator of sectoral leadership in urban consolidation, Bachus Marsh (Vic), while only having 0.2 per cent (n = 22) apartments greater than four stories, shows all 22 to be public housing.

The first finding from this section is the over-representation of medium-density housing (attached, semidetached and units less than four storeys) in social housing, indicating that an asset optimisation process has been ongoing. The vast majority of urban areas show roughly twice, in some instances three times, the number of medium-density social dwellings than is typical for that area.

Taking some examples from Table 8 as an illustration, Sydney has 20 per cent medium-density dwellings, but the social housing proportion is 58 per cent, 2.05 times greater than is typical. The Gold Coast is exactly double at 32 per cent private and 64 per cent social, while Perth is triple at 20 per cent private and 60 per cent social.

Rural urban environments also show this trend, including Balina (27% private, 62% social) and Rockhampton (27% private, 62% social), with the issue being even more pronounced in some areas, such as Albany (WA, 9% private, 39% social) and Gisborne (7% private, 57% social). This not only illustrates social land optimisation, but also raises issues relating to tenure blindness, particularly in rural areas, with this typology being overly associated with government and community rent.

Table 9: Housing and social housing by typology

		Total housing				Social housing			
State	SUA	No.	Sep. %	Unit <4 st %	Unit 4+ st %	No.	Sep. %	Unit <4 st %	Unit 4+ st %
NSW	Sydney	1,879,048	52	28	20	73,402	28	58	13
NT	Darwin	50,674	59	26	15	2,898	45	47	8
Qld	Gold Coast	297,691	53	32	14	5,452	28	64	8
ACT	Canberra	201,592	61	27	12	10,376	51	47	3
Vic	Melbourne	2,005,216	65	25	10	41,821	33	49	18
NSW	Forster	11,927	58	33	9	363	20	80	1
NSW	Nelson Bay	16,076	61	30	8	215	14	77	8
Qld	Brisbane	971,554	71	21	8	29,554	45	49	6
Qld	Sunshine C.	166,191	70	22	7	3,015	33	60	7
NSW	Port Macq.	23,284	65	28	7	871	29	62	9
NSW	Wollongong	124,128	70	24	6	7,526	46	50	4
WA	Karratha	7,230	75	20	5	479	75	18	8
WA	Perth	869,301	76	20	4	23,067	36	60	3
Qld	Cairns	64,967	68	28	3	2,324	45	53	1
Qld	Yeppoon	8,946	81	15	3	203	23	77	0
Qld	Townsville	74,698	78	19	3	2,989	52	46	2
NSW	Central C.	149,360	77	20	3	4,467	36	60	3
WA	Port Hed.	7,107	64	33	3	674	76	24	0
Qld	Gladstone	20,085	81	17	3	831	58	42	0
NSW	Newcastle	210,388	79	18	3	10,077	45	52	3
SA	Adelaide	582,312	73	24	2	30,483	40	59	1

Source: Author derived from ABS Census data, landlord type and dwelling structure, 2006 and 2021. Note: SUAs sorted by the proportion of high-density units and then medium-density units. Only areas with 1 per cent or greater of higher density units have been included. Note on column headings: 'Total housing' refers to all permanent housing, public and private; 'Social housing' is all state (public) and community housing; 'N' is the number; 'Sep %' is the percentage of detached dwellings; 'Unit < 4st %' is the number of semidetached and attached townhouses and units less than four stories; 'Unit 4+st%' is the percentage of units in buildings four stories or higher.

Social housing in higher densities (four-plus-storeys) varies according to local context. Sydney is slightly under-represented in higher densities (20% of private, 13% of public), Melbourne is slightly over-represented (10% of private, 18% of public), while Darwin (15% of private, 8% of public), the Gold Coast (8% of private, 14% of public) and Canberra (12% of private, 3% of public) show a significant disparity, all of which is related to local policies and development regulations, historical social housing trends, housing markets, funding mechanisms, the age of the build and so forth. To rule out historical effects and to show, irrespective of jurisdictional regulation, what has changed recently, we need to examine the rate of change in these typologies.

Table 10 has been sorted by volume increase in units of greater than four storeys between 2006 and 2021 as an indicator of change in typology and increase in density of housing over time. It is again limited to areas with higher density units. A number of points can be taken from this table. The first is the phenomenal growth of higher density social housing typologies, with Sydney showing a 13-fold increase (1,331%) of stock in four-plus-storey buildings, Melbourne a 15-fold increase (1,573%) and similarly high increases in other capital cities. Hobart and larger non-capital cities (e.g. Newcastle, Sunshine Coast) showed even higher percentage gains, but starting from a lower base point, in some instances having zero apartments in four-plus-storey buildings in 2006. This is the second point from this table – namely, that higher density social dwellings are not limited to capital cities and will likely continue to grow as this becomes typical practice in the regions.

The third point speaks to decreases in other typologies. While Sydney showed gains in higher density stock, it also showed high (–17.5%) divestment in separate dwellings, which was replicated, though to a lesser degree, in most NSW urban areas and also in many rural areas nationwide. Brisbane (–8,3%), Canberra (–10.1%), Darwin (–20.8%) and Adelaide (–8.6%) also showed significant divestment in separate dwellings. Counterwise, Melbourne increased the number of separate dwellings by 13.5 per cent, as did Hobart (7.9%) and, to a lesser extent, Perth (1.5%). What this indicates is that, and allowing for regional variation, some jurisdictions are promoting divestment with minor commitment to reinvesting in higher density units (SA, NT); some are looking at major divestment in separate dwellings and moving to significant investment in higher density dwellings (NSW, Qld, ACT); and some are aiming for a more balanced portfolio, increasing stock in separate dwellings as well as increasing investment in higher density dwellings (Vic, WA, Tas).

Table 10: Social housing in 2021 and change in 2006–21 by typology

	Social 2021 (n)			Social 2006–21 (n)			Social 2006–21 (%)		
Urban area	Sep	Unit <4 st	Unit 4+ st	Sep	Unit <4 st	Unit 4+ st	Sep	Unit <4st	Unit 4+ st
Sydney	20,653	42,928	9,821	−4,381	−95	9,135	−17.5	−0.2	1,331
Melbourne	13,747	20,610	7,464	1,635	−4,152	7,018	13.5	−16.8	1,573
Brisbane	13,234	14,543	1,777	−1,194	2,429	1,613	−8.3	20.1	983
Perth	8,382	13,952	733	124	1,809	554	1.5	14.9	309
Gold Coast	1,546	3,466	440	56	495	399	3.8	16.7	973
Newcastle	4,550	5,206	321	−603	593	312	−11.7	12.9	3,466
Wollongong	3,449	3,745	332	−520	9	312	−13.1	0.2	1,560
Canberra	5,257	4,825	294	−589	467	261	−10.1	10.7	790
Darwin	1,310	1,359	229	−345	−165	229	−20.8	−10.8	new
Adelaide	12,158	17,970	355	−1,147	−3,389	225	−8.6%	−15.9	173
Sunshine C.	994	1,821	200	133	242	197	15.4	15.3	6,566
Central Coast	1,615	2,701	151	-93	510	148	−5.4	23.3	4,933
Hobart	3,218	2,164	130	235	64	127	7.9	3	4,233
Port Macq.	254	536	81	−15	81	81	−5.6	17.8	new
Townsville	1,548	1,371	70	−154	276	67	−9.0	25.2	2,233
Coffs Harbour	570	643	41	−57	12	41	−9.1	1.9	new
Karratha	358	84	37	17	−53	37	5	−38.7	new
Geelong	1,945	1,409	23	56	148	23	3	11.7	new

Source: Author derived from ABS Census data, landlord type and dwelling structure, 2006 and 2021. Note: Table ordered by volume increase in units of four-plus storeys, 2006–21. Note on column headings: 'Social 2021 (n)' is the number of social (public and community) per SUA at 2021 census; 'Social 2006–21 change (n)' refers to the volume change over 15 years; 'Social 2006–21 change %' is the proportional change over that time; 'Sep' refers to separate, detached, housing; 'Unit <4st' refers to townhouses and units in buildings of one to three stories; 'Unit 4+st' refers to units in buildings of four stories or greater.

However, these gains in higher density need to be tempered with an overview of portfolios, which are represented in Table 11, and again sorted by greatest change in proportion of higher density units. As can be seen, though the growth rate has been significant, it has largely come from a low base. At most, higher density stock only accounts for 16.7 per cent of all social housing stock in Melbourne and 12.4 per cent in Sydney, showing that it is still a minority typology. Interestingly though, and supporting Table 10, there have also been considerable gains to this typology outside of major centres, with it being upwards of 5 per cent of all stock in many areas, which is *not* a reflection of that typology being the majority one in those SUAs. The Gold Coast and Sunshine Coast, for example, still have 53.4 per cent and 70.4 per cent separate housing, respectively. Table 11 also reinforces the volume of medium-density housing that makes up a significant share of portfolios.

Table 11: Social housing portfolios and change 2006–21

	2021 %			2021–06 Change %		
SUA	Sep	Unit <4st	Unit 4+st	Sep	Unit <4st	Unit 4+st
Melbourne	32.9	49.3	17.8	0.4	–17.1	16.7
Sydney	28.1	58.5	13.4	–8.3	–4.1	12.4
Port Macq.	29.2	61.5	9.3	–8.0	–1.3	9.3
Nelson Bay	14.4	77.2	8.4	–6.7	–1.7	8.4
Bacchus M.	55.9	35.9	8.1	–15.8	7.7	8.1
Darwin	45.2	46.9	7.9	–6.9	–1.0	7.9
Karratha	74.7	17.5	7.7	3.4	–11.1	7.7
Gold Coast	28.4	63.6	8.1	–4.7	–2.4	7.2
Sunshine C.	33.0	60.4	6.6	–2.3	–4.2	6.5
Brisbane	44.8	49.2	6.0	-9.2	3.8	5.4
Wollongong	45.8	49.8	4.4	–5.6	1.4	4.2
Central C.	36.2	60.5	3.4	–7.6	4.3	3.3
Coffs Har.	45.5	51.3	3.3	–4.4	1.1	3.3
Newcastle	45.2	51.7	3.2	-7.6	4.5	3.1
Canberra	50.7	46.5	2.8	–6.4	3.9	2.5
Perth	36.3	60.5	3.2	–3.8	1.5	2.3
Hobart	58.4	39.3	2.4	–0.3	–2.0	2.3
Townsville	51.8	45.9	2.3	–9.0	6.8	2.2
Forster	19.6	79.6	0.8	–3.3	2.4	0.8
Adelaide	39.9	59.0	1.2	1.6	–2.4	0.8
Cairns	45.1	53.5	1.4	–9.3	8.5	0.7
Geelong	57.6	41.7	0.7	–2.4	1.7	0.7

Source: Author derived from ABS Census data, landlord type and dwelling structure, 2006 and 2021.

We have established that social housing typologies are shifting to higher densities as well as the significance of this shift. The final part of this section explores the market share of these changes across public and community housing sectors. The aim is to examine what typologies are owned, managed or even driven by the community sector to determine if the community sector is being burdened with older stock (as some of the rationale for transfer implies) or is part of the densification process.

Table 12 shows levels of community housing stock in urban areas, sorted by percentage of ownership/management of units in four-plus-storey buildings. It shows, for example, that, in Adelaide, 24.1 per cent of separate stock, 26.3 per cent of attached medium-density units and 63.1 per cent of higher density stock is community owned/managed. While the additional higher density units acquired over the 2006–21 period are low (133) compared to separate housing stock (1,661), it does show that the community housing sector is working in this space.

Taking just the capital cities, the lowest is Darwin at 10 per cent community owned/managed higher density stock; however, as we have shown above, Darwin is atypical in terms of community housing, having far lower rates of community housing than other capitals. The second lowest is Melbourne, which shows an 18.5 per cent share of higher density units, not as high as the proportion of medium-density units (21.7%) but still far higher than the proportion of separate units (15%). It also shows that the increase in community management/ownership in this typology has been the highest (237%), which was also the case in Adelaide, Hobart, Brisbane, Sydney and many second-tier cities. This indicates that community housing organisations are either driving higher order development to deliver increased density or administering new developments at a higher rate than old, detached stock.

Table 12: Community housing typologies, share and change 2006–21

	2021 Community share (%)			2006–21 Change (n)			2006–21 Change (%)		
SUA	Sep	Unit <4 st	Unit 4+ st	Sep	Unit <4 st	Unit 4+ st	Sep	Unit <4 st	Unit 4+ st
Adelaide	24.1	26.3	63.1	1,661	1,803	133	131	62	146
Geelong	17.7	29.0	60.9	107	181	14	45	80	0
Central C.	22.7	24.5	58.3	238	338	85	184	104	2,833
Gold Coast	12.6	20.6	55.5	105	251	203	117	54	495
Port Macq.	55.5	61.2	53.1	117	241	43	488	277	0
Hobart	18.0	24.7	50.8	443	230	63	328	76	2,100
Brisbane	8.1	18.1	41.6	611	1,096	585	132	71	380
Newcastle	16.7	21.5	40.5	602	736	127	381	192	4,233
Sydney	13.3	21.3	36.4	1,647	5,620	2,890	149	160	421
Sunshine C.	12.5	14.9	30.0	77	144	57	164	113	1,900
Townsville	8.8	18.1	30.0	82	146	18	152	143	600
Perth	14.6	20.2	29.6	1,006	1,443	72	461	105	50
Canberra	8.2	14.4	24.5	321	472	39	292	212	118
Wollongong	5.9	12.6	19.6	71	274	49	53	140	306
Melbourne	15.0	21.7	18.5	1,369	2,206	971	197	98	237
Darwin	11.9	6.8	10.0	39	56	23	33	151	0

Source: Author derived from ABS Census data, landlord type and dwelling structure, 2006 and 2021. Note: Table ordered by percentage of ownership/management of units in four-plus-storey buildings. Note on column headings: '2021 Community share %' is the proportion of each typology owned or managed by the community sector (as opposed to the public sector) per SUA at 2021 census; '2006–21 Change (n)' refers to the volume of change over the 15 years; '2006–21 Change %' is the proportional change over that time; 'Sep' refers to separate, detached, housing; 'Unit <4st' refers to townhouses and units in buildings of one to three stories; 'Unit 4+st' refers to units in buildings of four stories or greater.

2.4 Policy development implications

Though there have been increases in social housing volume in almost all urban and regional centres, the market share of social to private housing is dropping nearly universally. This is evident in all state capitals (e.g. Sydney –0.8%, Melbourne –0.6%, Perth –0.7%) and many rural centres (e.g. Mildura –1.7%, Albury–Wodonga –1.9%). As discussed earlier, much of this is the result of private construction occurring at a far greater rate than social housing provision. This reflects the weak financial position of state housing agencies and the failure of Commonwealth–state funding arrangements to create viable funding arrangements that capture the changed client base of public housing agencies and changed cost structures related to capital maintenance and renewal. Not surprisingly given the estate redevelopment model of public housing de-concentration, such development has had minimal impact on volume.

On the presumption that the proportion of the total population needing housing services will remain reasonably consistent, this points to a significant reduction in the capacity of the sector to provide for this growing population. Given the volume of private investment, and the treasury funds gained from this investment, it would seem appropriate that some of this private development be leveraged to simultaneously increase the capacity of the social housing sector, so both can grow in step.

While some state capitals are close to or above the national average, some are clearly lagging. Melbourne (2.1%), Perth (2.7%) and Brisbane (3.1%) are all below the national average and have some way to go to achieve it, particularly given the above illustrated increase in private dwellings and loss of market share. Given their large populations, projected population increases and access to services, these cities, in particular, should focus on increasing their market share. To restate an earlier point, the national average should not be seen as a benchmark of achievement, hence the 5 per cent target used later in this report.

Particularly in regional centres, there is evident a limit to the rate of transfers and divestment, with some areas having only 30 years of transfers remaining. Even in some capital cities, Adelaide in particular, the rate of divestment is so great that, at current trends, public housing will largely be depleted in 50 years. This shows that, where asset sales are being used to prop up state budgets, this is not sustainable in the long term. However, where the community sector is taking over assets, particularly in regional areas, it may show that good policy is being followed, especially where community housing organisations, who are closer to the needs of the community, are administering the housing services locally.

The over-representation of middle-density and attached housing, particularly when taken with general divestment in single housing, shows that optimisation of assets is occurring and that, with the assumption that attached housing generally has higher land value associated with higher amenity areas, these dwellings are better located than single units. However, an assessment of quality, actual location and tenure blindness would need to be undertaken to completely validate this, as the over-representation could also indicate poorer quality housing.

There has been a considerable increase in high-density (four-plus-storeys) dwellings in the sector in recent years. Again, using the assumption that higher density units are in areas of higher land value and amenity, this would indicate a move to better located units. When combined with previous findings, this also indicates that the future of social housing will be far denser and more compact than it has been to date, meaning that assets will largely be housing units and not land per se, which may alter the leveraging of assets for redevelopment purposes going forward. The growth of this sector has been particularly strong in the community sector, showing a maturing of the sector and, though it would require an assessment of the development role of the sector, the potential to deliver (or at least manage) higher density units and large-scale products.

3. Changing urban context of social housing

- **Cities and urban areas are densifying and the ring of densification is spreading.**
- **Medium-density typologies are becoming typical throughout the established suburbs of cities and higher density is associated with activity centres outside of city centres.**
- **Social housing is increasing in denser areas, illustrating both the ongoing densification of locations and divestment of low-density assets for higher density ones.**
- **There has been a significant divestment in lower density and lower Socio-Economic Indexes for Areas (SEIFA) locations. However, most assets remain in low-density, low-SEIFA locations, raising questions about the optimum level of investment and divestment.**

This chapter explores the locational attributes of social housing stock and the changing nature of cities as they increase in density due to compact city agendas and market-led infill. The aim is to illustrate where stock exists in relation to density (as a proxy for increased demand-led services) and to show how areas that are currently low density will become higher density and, with good planning, provide increased service provision.

3.1 Existing research

All capital cities have projections for population increase, with these increases often being the major theme for macro planning policies, such as 'Melbourne at 5 Million' (Victorian Government 2013), which has now been superseded to Melbourne at 8.5 million, and 'Perth and Peel at 3.5 Million' (Western Australian Planning Commission 2018). Even when figures are not directly quoted in the title, urban growth is a consistent theme across these documents (Department of Environment, Land, Water and Planning 2017; Government of South Australia 2022; Greater Sydney Commission 2018).

While substantial population expansion is always an element of these policies, the compact city agenda (Breheny 1992) has, particularly over the last 30 years, informed many of these plans, with urban consolidation becoming a critical aspect. A key aspect of this has been 'infill targets', in which targets for the proportion of new housing to occur within the established boundaries of cities are set, varying between 47 per cent and 70 per cent for state capitals (Newton and Glackin 2014). The larger policies, aimed at delivering mixed-use, precinct-scale development, and, often, transport-oriented development, typically remain as state-level policies articulated through local governments and development partnerships. Smaller-scale infill occurs through the redevelopment of private individual land parcels as these are subdivided into marginally denser units – typically townhouses and small apartments (Newton, Newman et al. 2022).

Both large-scale and small-scale infill, as well as market popularity for townhouses and units and the growth of the sector to deliver them, contribute to the ongoing densification of our cities, which new federal and state housing delivery policies (Victorian Government 2023) will no doubt intensify.

Significant in terms of this study is that some of these plans, such as that of metropolitan Melbourne, formally seeks to embed a 20-minute neighbourhood concept into major infrastructure projects, helping to create and connect neighbourhoods that enable people to meet most of their everyday needs within walkable catchments of their home. This has implications for new social housing provision if, given the recent failures of infrastructure provision in outer-urban growth areas, such infrastructure provision can be achieved. This is more likely to be achieved in outer-urban growth areas if they too can be made to achieve greater levels of densification, not just in existing build up areas.

The impact of this densification is not just limited to housing. Density has been shown to be one of the more significant elements of local liveability (Glackin, Moglia et al. 2022), as it supports higher levels of local commercial activity, and, where residential density is low but access to services is high, it attracts density through its additional amenity. Therefore, we can assume that, particularly when properly planned for, density increase is a corollary of better access to services (Glackin, Moglia et al. 2024). This is supported by densification business models, which rest on land value increase/optimisation and the trade-off between land/dwelling size and local area attractors.

The implications for social housing are twofold. First, infill offers the capacity to optimise assets (see Khor, Taylor et al. 2023; Murray, Bertram et al. 2015). Second, infill promotes built form change. In this research, we are focused on the second implication and how it impacts the locational aspects of social housing, particularly the correlation between increased density and increased access to services, resulting in (potentially) better outcomes for tenants. This research is based on existing densification patterns within existing urban areas. Outer-urban areas at present have little evidence of densification.

As a comparator, the ABS Socio-Economic Indexes for Areas (SEIFA) will also be analysed to see if there has been any change in terms of the location of social housing. As SEIFA is an index, it necessarily includes some areas of lower value; however, analysing across census periods allows us to compare the locational attributes of areas and the outcomes of policies that aim to better situate social housing.

To be clear, we are attempting to measure the change in locality, not necessarily the movement of social housing in relation to divestments, transfers and new development, though these changes will be partly reflected in the outcomes. The aim is to show the impact of internal migratory patterns on areas as populations move and as socio-demographics change. For this section we will use Statistical Area 2 (SA2) data and focus only on major cities.

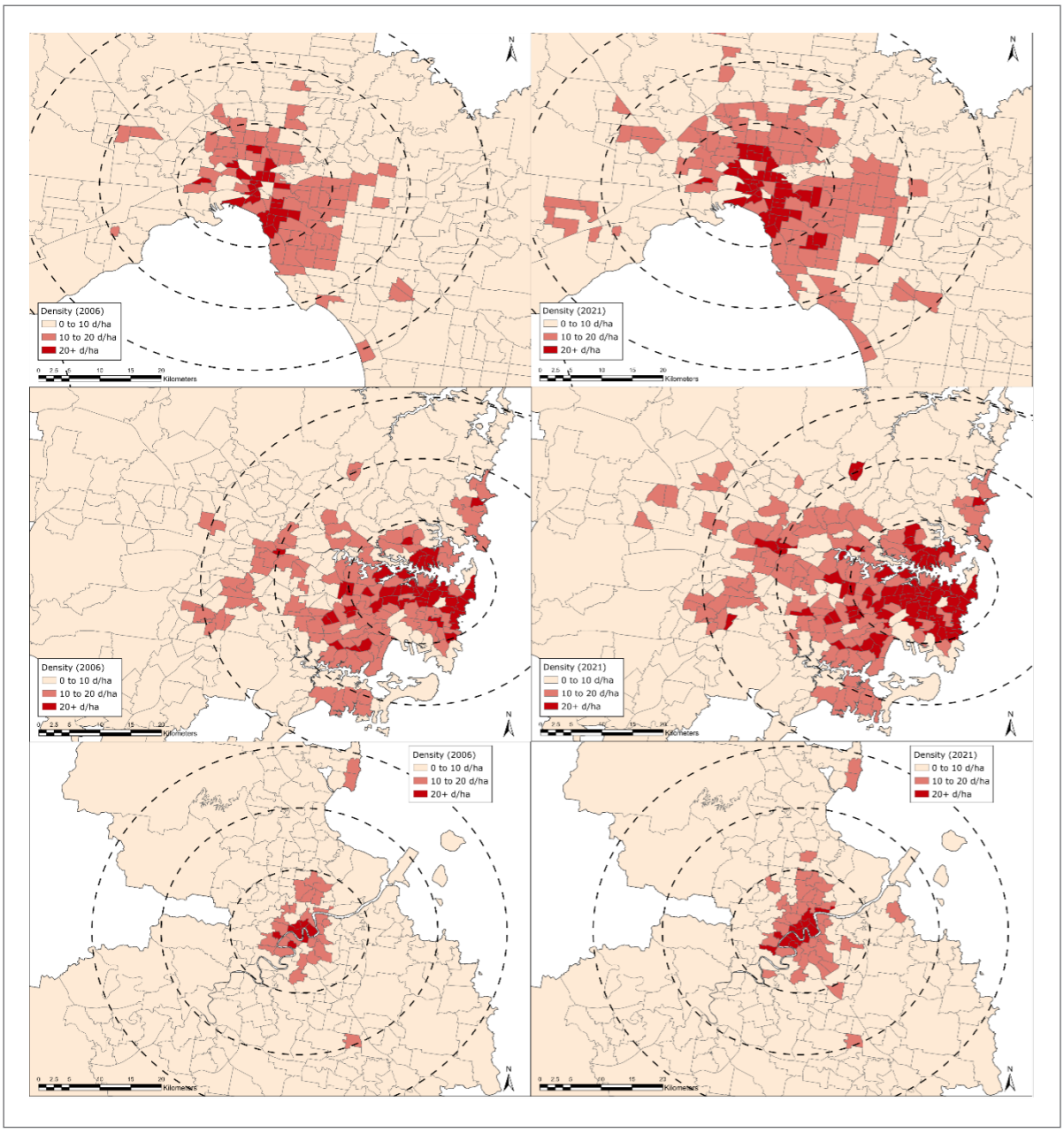
3.2 Density and social housing

Here we explore the changing densities of SA2s in the period 2006–21. Gross density assumes that parkland and roads remain unchanged for the period. For the sake of simplicity, figures 1 and 2 show density in three categories of dwellings per hectare (d/ha): <10d/ha, 10–20 d/ha, >20d/ha. This is not an indicator of walkability or liveability; however, these densities have been linked to higher levels of both walkability and liveability. The lowest category represents typical suburban form; the middle category represents more of an urban character, proximate to a high street with some apartments; and the highest category represents inner-urban form, with high-rise and major activity centres. In short, the lightest shade represents single-lot detached built form, the next tier represents modest infill and townhouses/walk-ups, while the darkest tier represents high-rise as a norm throughout the area.

In Figure 1 we can see how density is increasing in many inner- and middle-ring SA2s across Melbourne, Sydney and Brisbane. This is occurring in all state capitals and some higher order, non-capital cities to varying degrees. It shows the result of market pressures and, to a lesser degree, planning practices, which increase the volume of housing in areas as land values respond to changes to market acceptance of denser housing – resulting, effectively, in a creeping densification expanding out from the central business district (CBD) as land parcels become undercapitalised and are redeveloped.

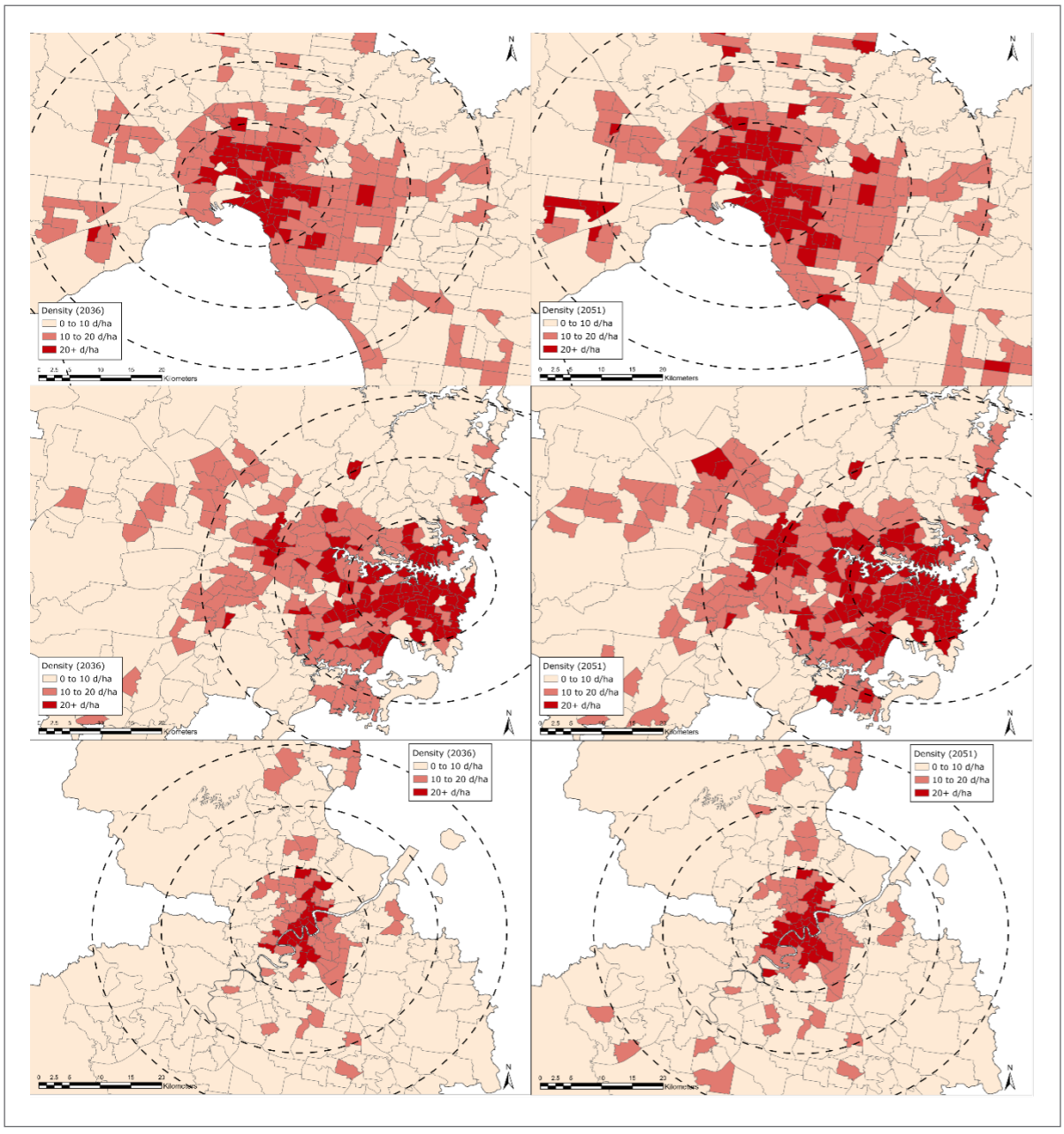
Illustrating future densification, Figure 2 shows projections based on density change rates for Melbourne, Sydney and Brisbane in 2036 and 2051. These do not include strategic planning for areas and may overestimate new suburbs where there has been significance change in 2006–21. However, they do show how denser living and CBD-like environments will extend well beyond their current limits.

Figure 1: Increasing densities across Melbourne, Sydney and Brisbane, 2006–21, by SA2 categories <10d/ha, 10-20d/ha, 20d/ha+



Source: Author derived from ABS Census data, dwelling structure, 2006 and 2021.

Figure 2: Density projections for Melbourne, Sydney and Brisbane, 2036 and 2051, based on trends between 2006 and 2021



Source: Author derived from ABS Census data, dwelling structure, 2006 and 2021, and ongoing projections at the current rate of change.

Table 13 shows that, in all state capitals (except Hobart), the volume of social housing is decreasing in lower density areas and increasing in higher density areas. This may be due, in part, to changes in the location of stock to higher density areas, which would fit well with the trend of reducing the asset management burden of older buildings and reinvesting in newer buildings with denser form. Alternatively, it could be a reflection of infill practices making areas denser by increasing the density around existing assets. This needs to be explored further; however, we assume, given the low net increases nationally, plus the change in volumes at the SA2 level, that it is a product of both. Older dwellings are divested for newer ones, which, as infill practices push up local densities almost universally, are replaced with newer, denser units, either in the form of marginally denser townhouse/apartments or units in high-rise developments.

Table 13: Distribution of social housing across areas of lesser and higher density

	2006			2021			Change		
d/ha	<10	10–20	20+	<10	10–20	20+	<10	10–20	20+
Adelaide	31,144	4,346	0	20,455	10,140	0	−10,689	5,794	0
Brisbane	22,260	4,141	855	20,646	7,252	1,735	−1,614	3,111	880
Canberra	9,363	0	0	8,777	1,394	0	−586	1,394	0
Darwin	3,106	71	0	2,442	500	0	−664	429	0
Hobart	5,134	0	0	5,481	95	0	347	95	0
Melbourne	20,904	8,906	9,249	16,288	14,740	1,0971	−4,616	5,834	1,722
Perth	17,312	3,703	0	16,733	5,890	533	−579	2,187	533
Sydney	35,867	22,414	11,878	26,437	30,048	17,141	−9,430	7,634	5,263
Gold Coast	3,744	0	0	2,956	2,282	0	−788	2,282	0
Wollongong	6,899	913	0	6,673	922	0	−226	9	0
Cairns	1,705	341	0	1,974	353	0	269	12	0
Sunshine C	2,115	425	0	2,612	435	0	497	10	0

Source: Author derived from ABS Census data, dwelling structure, 2006 and 2021.

3.3 SEIFA and social housing

SEIFA is an ABS product that ranks areas according to advantage and disadvantage across composite census variables. As an index, it makes the score relative to other areas, such that, if one area goes up, it may push another area down the index. This relativity means that, while it is reasonably stable, it will shift, particularly as areas increase in land value and gentrify or, conversely depopulate or fall into decline. There is also a significant urban/rural divide, with state capitals generally over-represented in the upper SEIFA scores.

In Table 14, Sydney, Melbourne and Adelaide show upwards trends in terms of social housing location, moving up the scale from 1 to 5, indicating a better socio-economic location. This is due to increased higher density dwellings and to the shifting nature of the index as established areas improve.

In Adelaide, where social housing volumes fell significantly, the volume of dwellings in quintile 3 (Q3) went up, showing gentrification of areas, not investment. However, the divestment occurred in lower SEIFA areas, potentially indicating a move towards better located stock – a trend that is evident in most cities. Hobart appears to either be adding stock to lower quintile areas or the areas where housing exists are dropping in SEIFA score. Canberra, a city with consistently higher-than-average annual incomes, is over-represented with higher SEIFA scores and shows no dwellings in the lower quintiles.

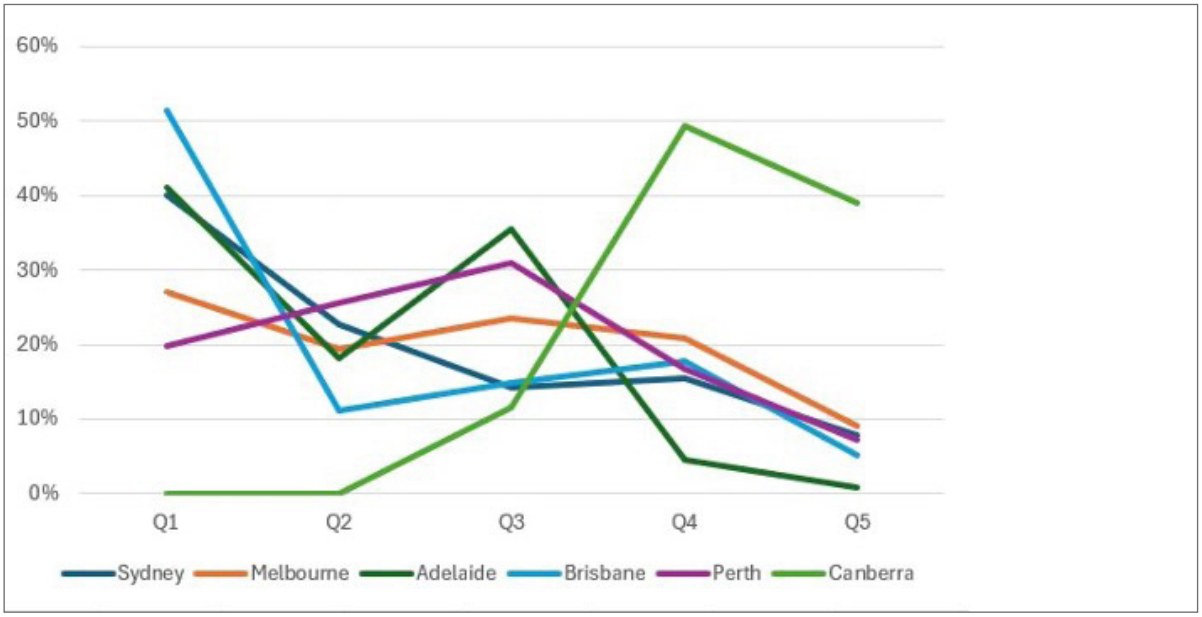
Table 14: Distribution and change of social housing across SEIFA quintiles

	Social housing 2021 %					% Change 2006–21				
	Q1	Q2	Q3	Q4	Q5	Q1	Q2	Q3	Q4	Q5
Sydney	27	17	10	20	26	−4	1	−11	5	13
Melbourne	15	11	17	30	27	−7	−4	−2	6	15
Adelaide	36	16	34	10	4	−7	−23	17	−2	1
Brisbane	36	11	13	24	16	4	-1	−2	3	5
Perth	19	19	24	24	14	7	−1	1	2	1
Canberra	0	0	9	44	46	0	0	−2	12	−9
Newcastle	29	25	32	7	7	−4	−6	9	0	4
Wollongong	33	22	24	21	1	−14	11	−14	15	0
Hobart	59	10	15	13	3	2	4	2	0	0

Source: Author derived from ABS Census data, Socio-Economic Indexes for Areas, 2006 and 2021. Note: The change between 2006 and 2021 will not sum to 0 due to additional units. As such, this change should be seen as areas of investment and disinvestment, as well as the effect of SEIFA changes as areas respond to social and economic factors.

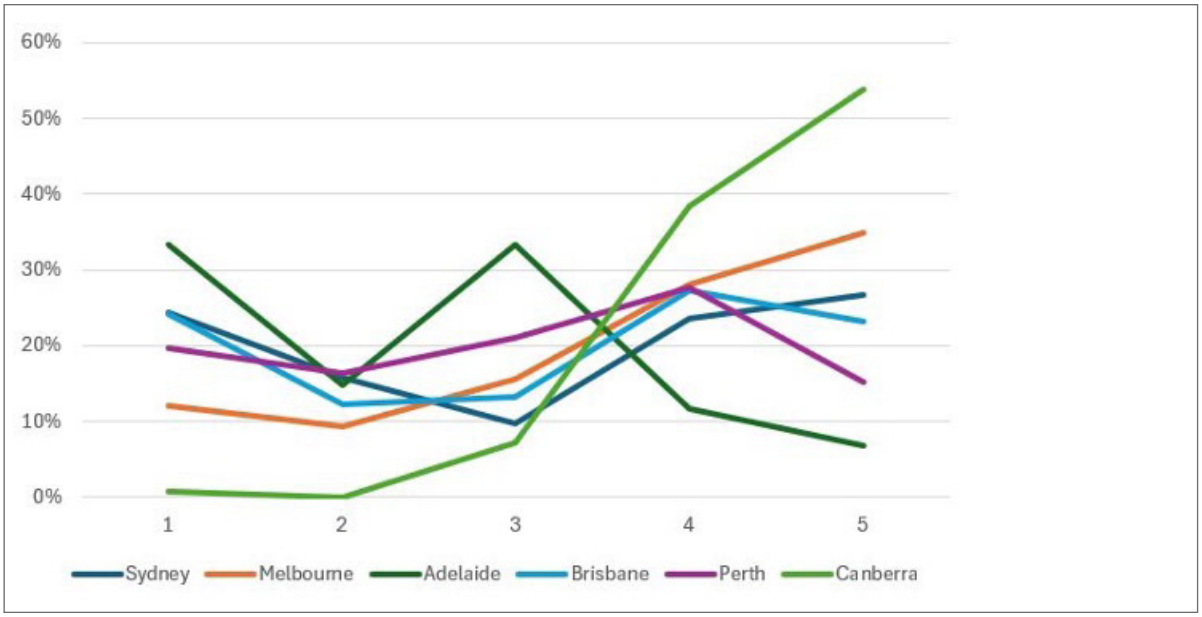
In terms of typologies, and with the exception of Perth and Canberra, all major cities had the majority of separate housing stock in areas with the lowest quintile. Medium-density stock (outside of Canberra) is reasonably evenly distributed while higher density stock is typically in the higher quintiles, which is expected in terms of land value and development options, as well as the higher density surrounding built form that this creates. The distribution of the three categories of housing and their SEIFA quintile for each capital city is visually represented in Figures 3, 4 and 5.

Figure 3: Distribution of separate housing to SEIFA quintile



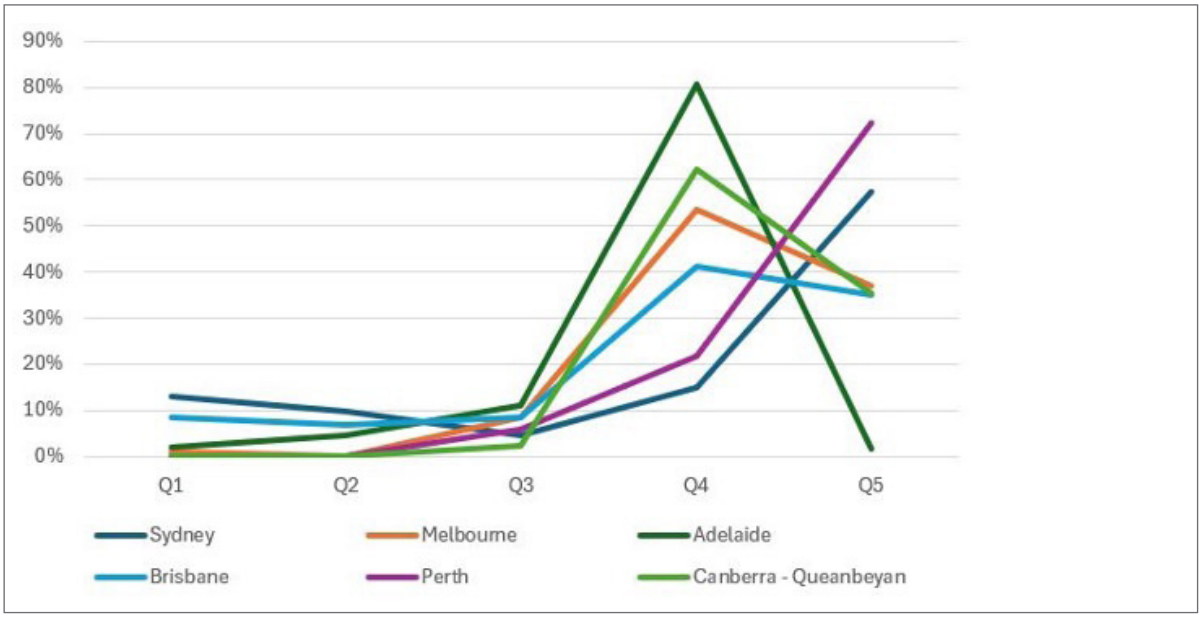
Source: ABS Census data, Socio-Economic Indexes for Areas 2021, dwelling structure and landlord type.

Figure 4: Distribution of medium density to SEIFA quintiles



Source: ABS Census data, Socio-Economic Indexes for Areas 2021, dwelling structure and landlord type.

Figure 5: High-density distribution to SEIFA quintiles



Source: ABS Census data, Socio-Economic Indexes for Areas 2021, dwelling structure and landlord type.

A key point from these figures is that lower density social housing, particularly in Sydney, Brisbane and Adelaide, is not generally well positioned socio-demographically. These cities also show a higher proportion of medium-density housing in lower quintile areas, indicating that, in terms of socio-demographic mix, there is greater potential for social housing clustering.

Given the over-representation of medium-density dwellings in social housing generally, other than redeveloping detached social units into medium-density social units, and on the presumption that higher SEIFA values attract a premium (which is clearly indicated in the final figure and the significant bias towards higher density in higher SEIFA areas), this shows little potential for financially leveraging these separate dwellings for new dwellings elsewhere. They are effectively 'stuck assets' and will remain so until density and land values around them change. While redevelopment is an option, this would only increase the over-representation and clustering of fully public funded social housing in lower SEIFA areas. However, it would also go some way to address the reduction in market share discussed above.

Other than Perth, the socio-demographic positioning of separate social housing falls with increasing SEIFA, which is to be expected, and generally we can see that as SEIFA increases, so does the density of social housing, indicating a price premium and an optimisation of land.

3.4 Policy development implications

All cities are densifying and the ring of densification is spreading outwards. Medium density is becoming more typical throughout the established suburbs of all cities, and high density, particularly in the larger cities, is moving well outside of city centres, with pockets showing up in established suburbs and transit centres. This presents an opportunity for assets that are within this creeping band of density increase to leverage land that has, to date, not had the value, or the surrounding context, to redevelop to higher densities.

There is evidence of significant divestment in lower density areas within the existing urban form and investment in medium- and high-density areas, particularly in Sydney but also in Melbourne and other capitals. This will party be a product of ongoing infill, as areas increase in density. However, the short timeframe of the analysis (15 years) would not produce the changes we can see from the data. Therefore, we can presume that there is a degree of strategic policy at work, and that housing organisations are moving to provide denser products in denser areas.

At one level, it could be argued that the housing sector is following aspects of best practice by positioning assets in areas that, if properly planned for, should have better access to services. At another level, it could be interpreted as an outcome of opportunistic policy to build whatever is possible in underperforming estates of high-value uplift. This alludes to the reduction in land assets and greater investment in units, which, again, concurs with previous data.

Similarly, there appears to be a divestment in lower SEIFA areas and investment in higher ones, particularly in Melbourne and Sydney. Again, this may be, in part, a result of local area improvement and outward growing gentrification/densification; however, the data would suggest that housing authorities are following 'salt and pepper' policies in terms of creating a good social mix. This may simply be an output of optimising maintenance budgets or offloading older stock, but, again, it shows a leaning towards higher density in better located areas.

4. The amenity index

- **An amenity index at a neighbourhood level for all significant urban areas in Australia is an effective method for assessing the locational attributes of social housing and where to better locate it. It can also indicate where to divest if location is a significant consideration.**
- **There is a lack of consistent data across all jurisdictions to show points or features of interest and amenity/access to services at a locally contextual level. A nationally consistent dataset should be constructed to address this.**
- **The relationship between amenities and housing prices is not uniform, varying according to geography, housing type and market segment.**
- **There is a strong correlation between access to amenities and house prices within inner-urban areas of capital cities, but this relationship does not hold for regional areas.**
- **Areas that combine relatively low house prices with high-amenity scores could offer optimal locations for social housing.**

This chapter continues the assessment of locality of social housing but uses a new tool, an amenity index, which was created for this report. This index shows level of access to services at a neighbourhood scale and, combined with valuations data, will be used to dig deeper into the distribution of social housing within cities and towns to provide geographical data to policy makers about where to retain, redevelop and divest social housing, depending on jurisdictional strategic policy.

The term 'amenity' is used in alignment with the authors' prior work, where it refers to local services and attractors, a concept commonly adopted in urban planning disciplines and land use legislation (Glackin, Moglia et al. 2022). Access to urban amenities is crucial in enhancing the liveability and functionality of social housing. Research highlights that place-based amenities, such as education, healthcare, recreational services and transport infrastructure, contribute significantly to the wellbeing of residents (Duranton and Turner 2012; Miles 2015; Vij, Ardeshiri et al. 2022). For instance, education facilities play a critical role in improving neighbourhood quality and residential satisfaction, particularly in social housing contexts where access to schools and recreational places have been shown to support physical and mental health, promoting overall community cohesion (Deller, Tsai et al. 2001; Gehring 2006).

Public transport accessibility is particularly vital for social housing residents, who are more likely to face financial constraints, health challenges and limited access to private vehicles, leading to transport inequity (Russell, McKerchar et al. 2024). Dodson, Gleeson et al. (2007) argue that proximity to public transport is essential for social inclusion, economic participation and access to community services, with considerable implications for employment opportunities and mobility.

The availability of food outlets and retail services also contributes to neighbourhood liveability. Witten, Blakely et al. (2011) show that access to local food shops fosters physical activity and social cohesion, making these amenities indispensable in urban planning. This aligns with broader considerations of urban wellbeing, which include walkability, access to essential services and overall quality of life.

The integration of amenities such as transport, education, food outlets and retail services into social housing planning underscores their role in creating equitable and liveable urban environments.

4.1 Method

4.1.1 Data, complexity and universality

Spatial datasets that aim to qualify aspects of a location vary by disciplinary focus. Some aim to assess walkability, some focus more on access to nature, some on access to services; however, all are pluralistic and aim to capture a range of spatial points around which to assess the quality of areas. When examining municipal features or points of interest (FOI/POI), datasets are regularly used. These typically include parks, education centres, sports and recreation centres, administration centres and centres of commercial activity, as well as any other local features that are deemed 'of interest' to the general public. They are often also used as an internal geospatial layer for strategic planning. These data layers are quite specific to the municipality and can vary greatly in terms of what is counted and how it is coded, making cross-municipal comparisons difficult without significant efforts in data collection, manipulation and harmonisation. Cross-jurisdictional assessment requires a state or regional dataset that is consistent across municipal boundaries, thus making an assessment of place much more consistent.

However, the same issue applies to state-based FOI/POI datasets. The objects they record vary, the counting method varies (some count buildings and other discrete points) and the categories that objects are placed into are also not consistent, compromising attempts to rank places across state lines. While some studies have managed to combine datasets of Sydney and Melbourne (Glackin, Moglia et al. 2022), as well as Brisbane and Perth (Khor, Taylor et al. 2023), these were limited to the boundaries of major cities only, and required separate, though methodologically comparable, assessment per city. Given that this study aims to capture not only all cities, but also all major regional areas (which typically have poor data coverage), FOI/POI were found to be infeasible given time and budget limitations.

Another candidate dataset is the Australian Business Register. This record holds the address of each business in Australia, be it commercial or otherwise. While it reduces the dataset to purely taxable points, excluding parks and other natural assets, it holds addresses for all shops, services, administrative centres, education centres and all other entities requiring a business name to operate. These are categorised according to the Australian and New Zealand Standard Industrial Classification, allowing for the removal of non-relevant businesses (such as heavy industry) and development of a suite of categories typical of a geospatial place assessment dataset (e.g. education, services, shops, recreation, night-time economy, sports, administration), which could be applied to every urban and regional centre nationally.

While initially promising, several issues were found with this dataset. First, some organisations had different mailing addresses and operational addresses, creating some confusion over where the business was located. In some instances, this issue crossed state boundaries. Second, many businesses had central offices controlling all locations, making it impossible to know the physical placement of actual business. Third, many businesses were duplicated, some as many as 20 times, interfering with the accurate counting of business locations. There were also many instances of business data being out of date. While these data issues could potentially be resolved through time-intensive analysis and data linkages with the Australian Tax Office (ATO), this approach was ultimately deemed infeasible given the project's budgetary and time constraints.

The final approach was to test OpenStreetMap (OSM), a global crowdsourced open geodata platform containing up-to-date geocoded and categorised points of interest for all areas. While this dataset showed some areas of poor coverage, it provided comparable data for all cities and regions, allowing for a national comparison.

4.1.2 Construction of the amenity index

OSM is a free, open geographic database maintained by volunteers through surveys, aerial imagery tracing and data imports from other sources (OSM 2022). Licenced under the Open Database Licence, it is widely used for electronic maps, navigation, humanitarian aid and data visualisation.

OSM node data were used to map amenities and services (see Table 15 for details) across all SA2s in significant urban areas (SUAs) in Australia. The data were accessed on 10 July 2024, which, at the time, was the most recent version of the dataset available to researchers. While some changes in the level of services are to be expected, the analysis presumed that the core activity centres comprising transport, education and commercial services would remain reasonably stable.

Accessing open data via OSM offers numerous benefits, including well-documented formats, ease of transfer across regions and automatic processing. Regular updates ensure that models based on these data remain current. Further, the transparency of open data allows for reproducible results, eliminating the 'black box' issue associated with purchased data.

OSM data are often more up to date than public authority data due to continuous volunteer maintenance. However, the quality of OSM data vary by region, depending on the number of active volunteers. Areas with more volunteers tend to have better data coverage compared to those with fewer volunteers (Klinkhardt, Woerle et al. 2021). A small number of rural centres had poor data that was unusable for this research. Due to the small area of these centres, and the lack of variance within localised amenity and access to services, this was not deemed a significant limitation to the research, as the main point of the index was to illustrate differences in larger conurbations.

Table 15: Data and categorisation from OpenStreetMap

TP	OSM class	OSM layer
Public transport stops	Tram stops, railway stations, ferry terminals	gis_osm_transport_free_1 (nodes)
Cafes, bars, pubs, restaurants	Restaurant, pub, café, bar, food court, bakery	gis_osm_pois_free_1
Community places	Place of worship, library, playground, theatre, cinema, museum, arts centre, community centre, public building, sports centre, swimming pool, stadium, dog park, pitch	gis_osm_pofw_free_1 gis_osm_pois_free_1
Shops	Supermarket, convenience store, greengrocer, butcher, beverages, marketplace, newsagent, kiosk, chemist/pharmacy, mall, clothes, shoe shop, jeweller, department store, toy shop, do-it-yourself, furniture shop, outdoor shop, sports shop, bicycle shop, stationery, gift shop, bookshop, mobile phone shop, computer shop, florist, garden centre	gis_osm_pois_free_1
Services	Post office, bank, atm, clinic, doctors, dentist, optician, hospital, beauty shop, hairdresser, laundry, veterinary, travel agent	gis_osm_pois_free_1
Education/childcare	School, kindergarten, college, university	gis_osm_pois_free_1* *Duplicate data was removed

Source: Authors.

Each instance of each category was summed per SA2, creating a count of public transport centres, cafes and bars, community places, shops, services and education centres for each SA2. Each of these scores were normalised per SUA, giving a category score of 0–1 for each urban area. These scores were then summed and again normalised per SUA, creating a 0–1 total score for each SA2 within the SUA. Due to the variance in data across SUAs, the Jenks 'natural break' method was used to construct quintiles of the index that were locally appropriate, as they showed, per location, where the break points were in the data. The product of this was a quintile (1–5) score for each SA2 within each SUA.

The product of this exercise yielded an amenity score for each SA2 within each SUA, the effect of which is to show, per urban area, accessibility to services. The distribution of amenity quintiles nationally is represented in Table 16. Amenity maps are shown in Appendix 1 and discussed in Section 4.3.

Table 16: Distribution of amenity quintiles

Amenity quintile score	% of SA2s	N of SA2
Q5 (high)	6	116
Q4	16	308
Q3	23	430
Q2	27	508
Q1 (low)	21	400
0 (not included, no data or not enough SA2s in the SUA)	7	130

Source: OSM (2022) and authors' calculations.

4.1.3 Connecting the amenity index to housing prices

The link between the location of amenities and house prices has often been discussed with an assumption that high prices are partly driven by access to certain amenities (Rosen 1974). Using the amenity index and house/unit prices we were able to explore that relationship.

To analyse property price trends and changes across SA2 regions over time and compare them to the amenity index, we utilised the Australian Property Monitor (APM) Timeseries Property Data (SA2), obtained via the Australian Urban Research Infrastructure Network (2024). This dataset provides monthly aggregated property data across Australia from March 1994 to July 2024. Each data point represents a 12-month aggregation, spatially organised using the Australian Statistical Geography Standard (ASGS) 2016 Statistical Area Level 2 (SA2) boundaries. The dataset includes information on properties listed for sale, listed for rent and sold.

The valuation data were processed in several stages. First, we mapped SA2 regions to SUAs obtained from the ABS. Next, consumer price index (CPI) data on housing for each capital city were processed, with June values chosen to represent the calendar year. CPI values were subsequently adjusted to a 2024 base year, enabling inflation-adjusted comparisons of historical median and mean detached and unit property prices. Missing values in the pricing data were interpolated linearly, while implausible values, such as extremely low prices, were corrected or removed. The data were then reshaped for longitudinal analysis across census years (2006, 2011, 2016 and 2021).

To align the APM housing data with updated geography standards, we used the ABS 2016–21 ASGS Correspondences. These included a conversion column, which allowed for geographical alignment between 2016 and 2021 SA2 codes. Historical property price data from APM are based on 2016 boundaries, while our analysis employs 2021 SA2 boundary definitions. Therefore, conversion ratios were applied to scale and redistribute property prices, ensuring consistency across datasets and time periods. The data were aggregated by SA2 region and outliers or implausible values were excluded to maintain quality.

For comparative analysis, SUA-specific quintiles of property medians and means were calculated for each census year using the Jenks natural breaks method. We discuss the outcomes of the analysis in Section 4.4.

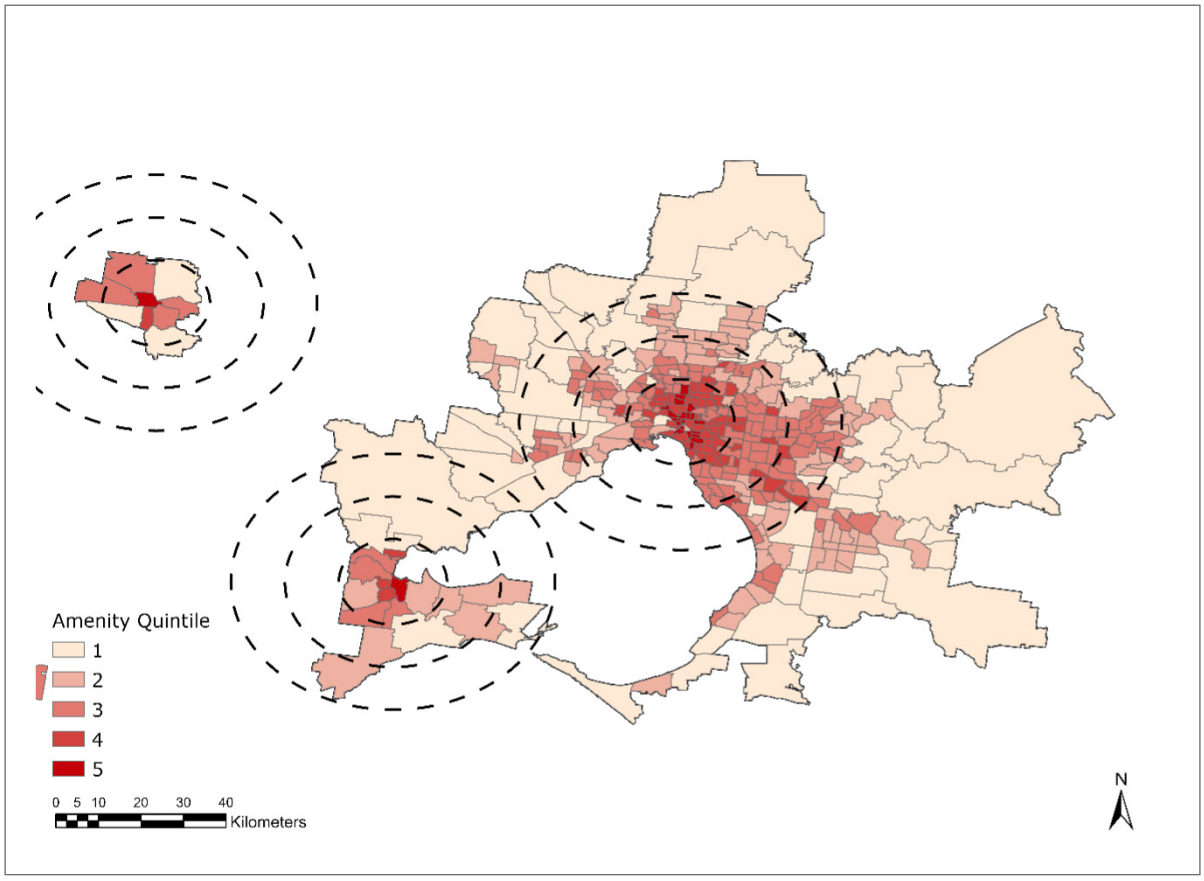
4.2 Trends within the amenity index

4.2.1 Melbourne, Sydney and Brisbane

The figures below show that each urban area, though in many instances contiguous, is distinct, having its own urban centre and relative scale of accessibility. A score of 5 (high amenity) or 1 (low amenity) will not necessarily be equivalent across cities or SUAs, as the range of services will be different per location. Instead, these refer to the SA2s within that urban area that have higher or lower amenity relative to that city (SUA). For the analysis, we excluded SUAs with fewer than five SA2s due to the lack of meaningful variation in the data. In these cases, we coded the amenity score as a 0.

In Figure 6 we can see the cities of Melbourne, Geelong and Ballarat, each being its own distinct market with its own categorisation of high and low amenity. The map reveals a distinct spatial pattern of amenity distribution across Melbourne's SA2s. The highest concentration of amenities (quintiles 4–5) is centred in the inner metropolitan area, with a noticeable distance–decay pattern as one moves towards the urban fringe. While there are some high-amenity corridors extending eastward and south-eastward from the centre, the western and northern fringes generally show lower amenity levels (quintiles 1–2), suggesting spatial inequalities in amenity distribution. This pattern reflects Melbourne's predominantly monocentric urban structure, though isolated pockets of higher amenities in outer areas indicate the presence of some suburban activity centres. Geelong and Ballarat are reflective of similar trends. Gisborne and Bacchus Marsh are excluded from the map as the large SA2s made it impossible to reliably estimate the amenity indexes within those SUAs.

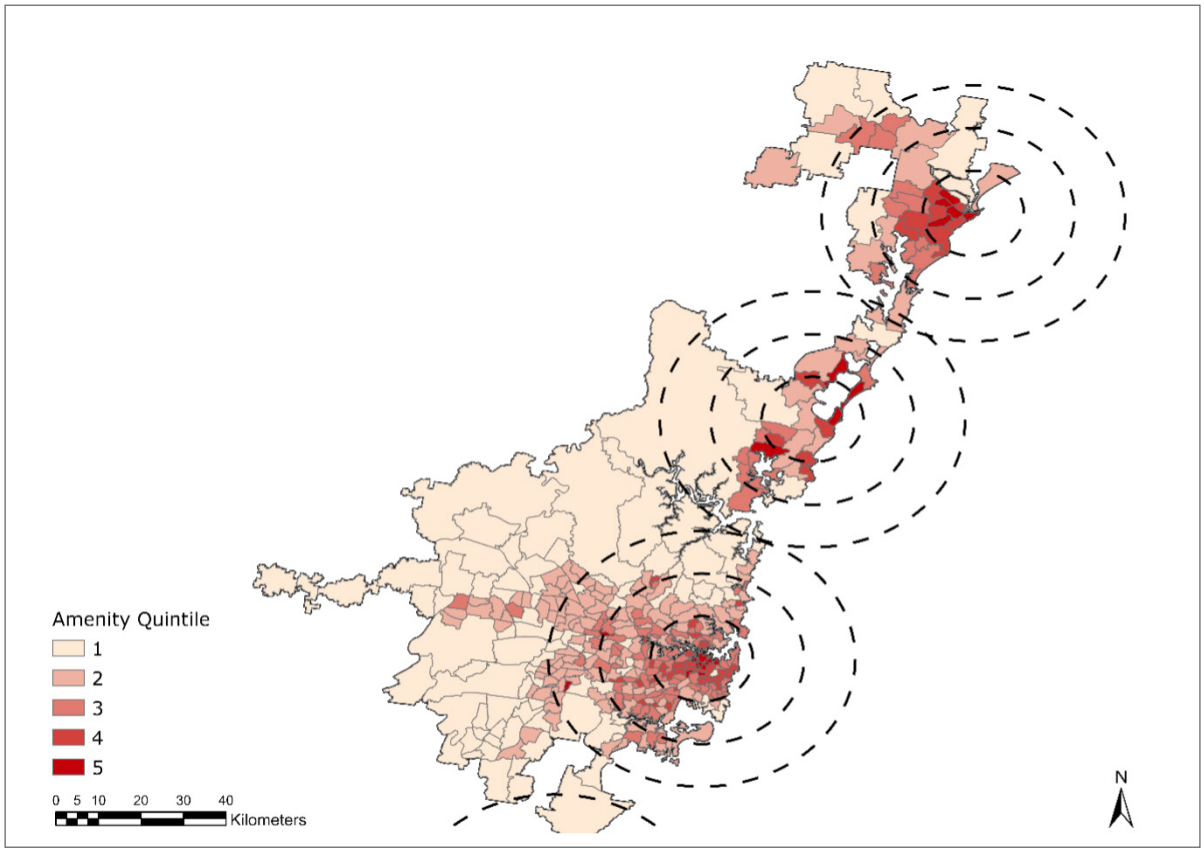
Figure 6: Amenity quintiles in Melbourne, Geelong and Ballarat



Source: OSM (2022) and authors' calculations.

The distinction between urban areas and levels of amenity can also be seen in Figure 7, which shows Sydney, Newcastle and the Central Coast, all of which are deemed to have distinct local levels of access and amenity. Sydney's highest amenity concentrations (quintiles 4–5) are clustered around its harbour and eastern suburbs, with a gradual decline westward. The pattern shows strong coastal orientation, with higher amenity levels following the coastline north through the northern beaches, pockets of the Central Coast, and intensifying again around Newcastle's urban centre. The western regions of Sydney and inland areas generally display lower amenity levels (quintiles 1–2), with some moderate-amenity corridors (quintile 3) extending into the middle-ring suburbs. This pattern reflects the historical development of these interconnected urban regions along NSW coastline.

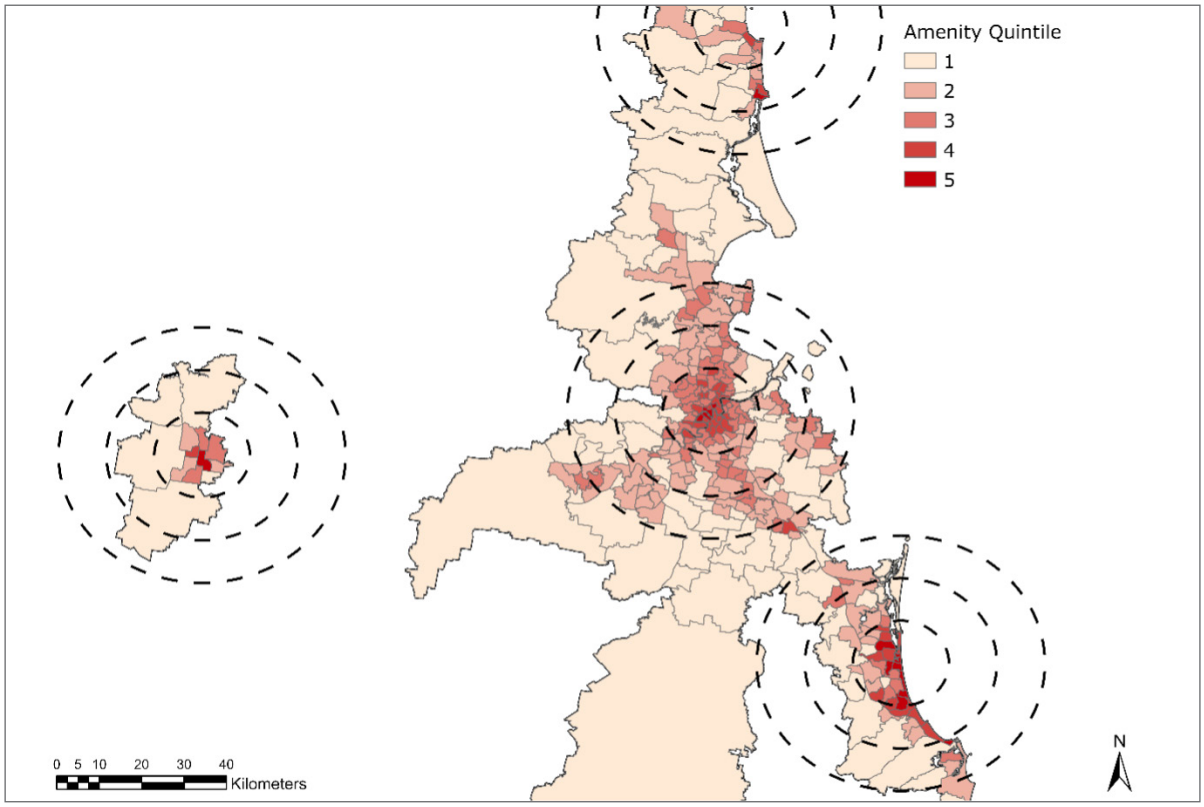
Figure 7: Amenity quintiles in Sydney and Newcastle



Source: OSM (2022) and authors' calculations.

Figure 8 likewise illustrates the distinction between Brisbane, the Gold Coast, the Sunshine Coast and Toowoomba, each of which has its own centre, hinterland and relative amenity. Warick and Killaroy are excluded in the figure, illustrating again that areas with a low SA2 count have no discernible distinction in amenity score. Brisbane's highest amenity areas (quintiles 4–5) are concentrated in its central business district (CBD) and inner suburbs, with a gradual decline toward the outer regions. The coastal regions show a clear linear pattern of higher amenities, particularly along the Gold Coast where there is a strong concentration of high-amenity areas following the coastline. A similar but less intense pattern is visible along the Sunshine Coast. The western and outer regions of Brisbane generally display lower amenity levels (quintiles 1–2), with some moderate-amenity areas (quintile 3) forming corridors along major transport routes.

Figure 8: Amenity quintiles in the Gold Coast, Brisbane, the Sunshine Coast and Toowoomba



Source: OSM (2022) and authors' calculations.

Analysis of amenity patterns across Australia's three largest metropolitan regions reveals both consistent spatial characteristics *and* distinctive regional variation. All three regions demonstrate strong concentrations of high-amenity areas (quintiles 4–5) in their traditional CBDs and inner suburbs, with a clear distance–decay pattern towards outer areas. However, each region shows unique geographical adaptations: Melbourne displays a relatively concentric pattern, with stronger corridors to the east and south-east; Sydney shows a harbour-centric and coastal orientation that extends north through to Newcastle; while south-east Queensland exhibits a polycentric structure, with high-amenity clusters in Brisbane's centre and along the coastal strips of the Gold Coast and Sunshine Coast. Common to all regions is the predominance of lower amenity levels (quintiles 1–2) in outer and western suburbs, suggesting persistent spatial inequalities in amenity distribution across Australia's major metropolitan areas. These patterns reflect both the historical development of these cities and their adaptation to local geographical features, particularly coastal influences in Sydney and south-east Queensland.

4.2.2 Extended assessment

With over 100 SUAs across Australia, a full visual assessment is not viable. Instead, a selection of maps of state capitals and selected regional cities are available in Appendix 1. These are referred in the section below.

State capitals

The analysis of Perth's amenities, available in Appendix 1, shows that the CBD and its surroundings, particularly to its north and west, score high. There is evidence of this high score following the train line to Fremantle. The index notes that the beachside suburb of Scarborough scores well and that the two SA2s to its south, renowned for having high land values, score low due to the lack of services in those areas. The university/hospital SA2 of Murdoch stands out as having a significant volume of services. On the negative side, areas such as Ellenbrook and Willagee appear to be scoring too high, which illustrates some of the issues covered above relating to problems with the dataset. Both areas do, however, have ample services, schools and health care services.

Melbourne also shows the CBD at its centre, with areas in and around the CBD that are underperforming having significant volumes of parkland. South Melbourne and the line from Richmond to St Kilda are clear, as is the ark out of the city into Flemington. Footscray, Moonee Ponds and Sunshine are well represented as western centres, as are Doncaster, Chadstone and Dandenong to the east. While there is some under-reporting in the Williamstown peninsula, this is a good representation of Melbourne's amenity rich and poor areas.

The analysis of Brisbane identified Ipswich and Redcliff and other service-rich areas. Some areas, such as Beenleigh, may be over-reported, but still have a good level of service access. The Darwin analysis also identified the CBD, northern beaches and Palmerston. The Sydney analysis captured the CBD, Newtown and the eastern beaches, Parramatta, Dee Why and Liverpool, but failed to capture other centres, such as Blacktown and, as such, is clearly not ideal. However, in terms of being able to access all cities with the same dataset, this method is reasonably consistent and provides a good overall assessment of cities and their contextually based access to services.

Second-tier cities

Moving to smaller cities, again available as maps in Appendix 1, the amenity quintiles of Townsville, Alice Springs, Newcastle, Wollongong (and surrounding towns), Albury and Bendigo clearly indicate a CBD, surrounding residential areas and hinterlands. The maps show that, though the dataset may be reduced in some areas, the method indicates a degree of difference per SA2, allowing it to be applied to smaller cities. It is worth pointing out that the level of amenity is relative to each city. A high score in Newcastle will not be the same as a high score in Ballarat; it simply means that, for the particular city (or SUA as defined by the ABS), it has the largest volume of services locally.

Regional towns

While many smaller towns could not be assessed using this method, as there were either too few data available or the SUA consisted of insufficient SA2s, some townships, such as Launceston, Gladstone and Rockhampton, could be assessed and showed good results. As with the second-tier cities, though to a lesser degree, these captured the CBD of each town and the reduction in services as one moves away from the centre. As there are fewer barriers to travel in these areas (assuming car ownership), and as they comprise single housing submarkets (to a large degree), there is less of a division of service access, meaning that amenity scores may be less useful regionally. However, our analysis shows that, even in smaller regional towns, there are quite significant distinctions between SA2s, allowing us to gauge the locational attributes of housing locally, though this would need to be tested in the field for human-scale accuracy.

4.3 Relationship between the amenity index and house prices

Urban economists have long recognised that housing prices are tied to local amenities (Rosen 1974). From public transportation and parks to shopping centres and community features, these elements play a crucial role in determining how much people are willing to pay for homes in different areas. While Rosen (1974) and Bartik (1988) established the foundational framework for evaluating housing characteristics, Albouy (2016) expanded this understanding by demonstrating how these relationships operate at a broader urban scale, incorporating both natural and constructed amenities in shaping not just housing prices but also overall urban quality of life. Mulley and Tsai (2017), Gunn, Saghapour et al. (2022), and Ghorbani and Meltzer (2024) have undertaken recent relevant research in this area.

Understanding the relationship between amenity distribution and property values is crucial for strategic social housing development, particularly when considering the conversion of existing low-density housing assets into higher density social housing in well-serviced locations. This section examines the spatial correlation between our constructed amenity index and house prices across Australia's major metropolitan areas, focusing on detached houses as a proxy for land prices. By analysing these relationships at the SA2 level, we can identify opportunities where lower priced properties in high-amenity areas might present viable opportunities for social housing redevelopment (see the analysis in Chapters 5 and 6). Our analysis reveals varying patterns between metropolitan and regional areas, as well as distinct relationships across different states and territories. We begin by examining detailed choropleth maps of the major metropolitan areas, followed by correlation analysis to quantify these relationships and identify potential areas for strategic intervention.

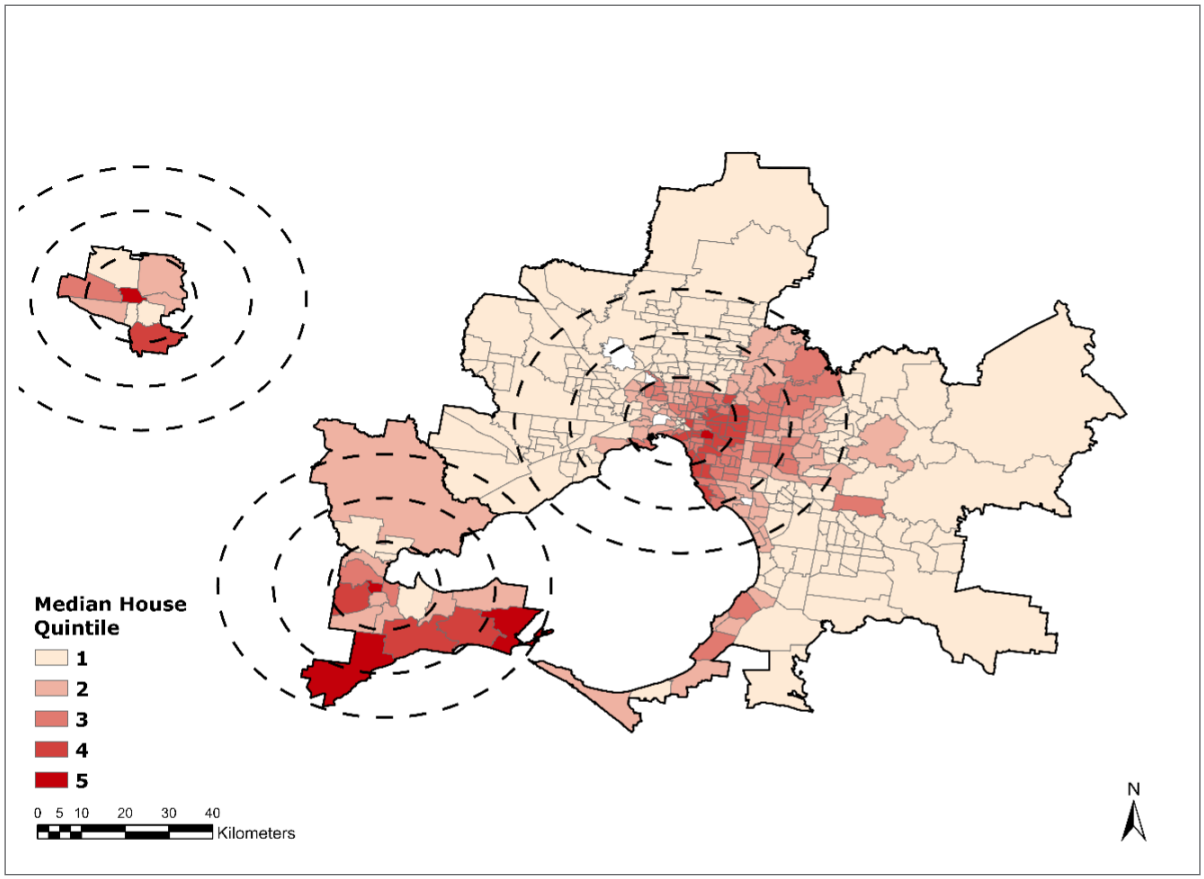
Our analysis examines the spatial distribution of SA2 median detached housing prices in 2021 across Australia's major metropolitan regions, comparing these patterns to the amenity quintiles discussed earlier.

4.3.1 Median house quintiles

The median house quintile map reveals an expected diffusion of housing prices across Melbourne's SA2s, with the highest quintiles (4–5) concentrated in the inner city and bayside regions, particularly through the eastern suburbs and along Port Phillip Bay. Lower quintiles (1–2) are predominantly found in the outer growth corridors and fringe areas, with notably lower values in Melbourne's north and west. Geelong and Ballarat display similar patterns, with higher values in their historic inner areas and waterfront precincts, surrounded by lower quintiles in their outer suburbs.

Comparing the housing and amenity maps shown earlier indicates a clear spatial correlation between high house prices and high-amenity scores, particularly evident in Melbourne's inner and eastern suburbs. However, some areas, notably in the outer east, maintain high house prices despite lower amenity scores, suggesting that other factors are influencing property values in these locations or that amenities are not as well correlated with those factors. Inner-city areas consistently score high on both measures, while outer growth areas typically show lower values across both metrics. This pattern is also reflected in Geelong and Ballarat, where central areas score higher on both measures compared to their peripheral suburbs.

Figure 9: Median house price quintiles in Melbourne, Geelong and Ballarat SUAs

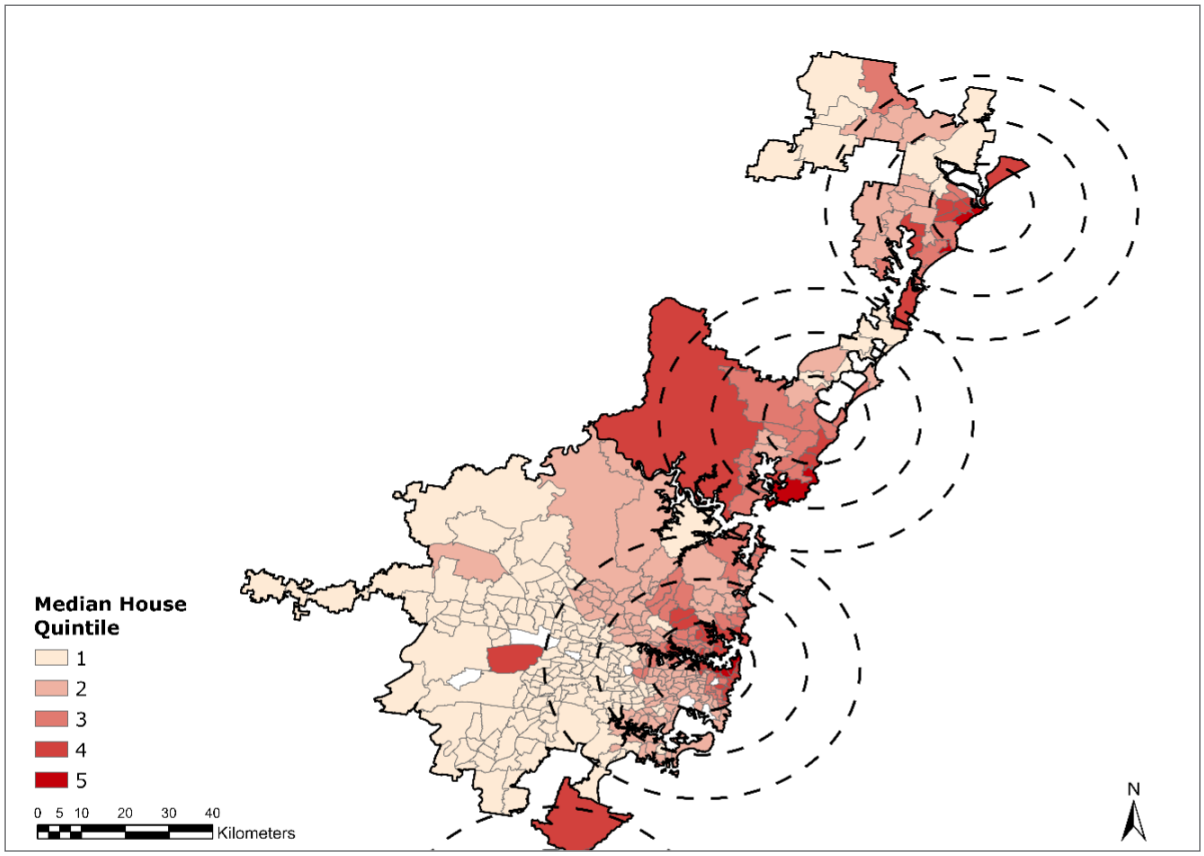


Source: APM (2024) and authors' calculations.

Like Melbourne, the median house quintile map for Sydney, Newcastle and the Central Coast reveals a distinctive spatial pattern. We see the highest housing price quintiles (4–5) concentrated along Sydney's harbourfront areas, eastern suburbs and northern beaches. The lower house price quintiles (1–2) are predominantly found in western Sydney and the outer-metropolitan fringe. Newcastle displays a similar coastal premium, with higher quintiles along its eastern beaches and lakefront areas, while the Central Coast shows moderate values (2–3) with some higher values along its coastal strip.

Comparing the housing and amenity patterns shows a strong alignment in Sydney's inner and eastern areas, where both house prices and amenity scores reach their highest quintiles. However, some affluent areas in Sydney's north shore maintain high house prices despite more moderate-amenity scores. The western regions consistently show lower values across both metrics. In Newcastle, there is a clear correlation between amenity and house prices along the coastal fringe, while the Central Coast demonstrates a more varied relationship, with amenity scores generally lower than house price quintiles would suggest, particularly in its southern areas.

Figure 10: Median house price quintiles in Sydney, the Central Coast and Newcastle SUAs

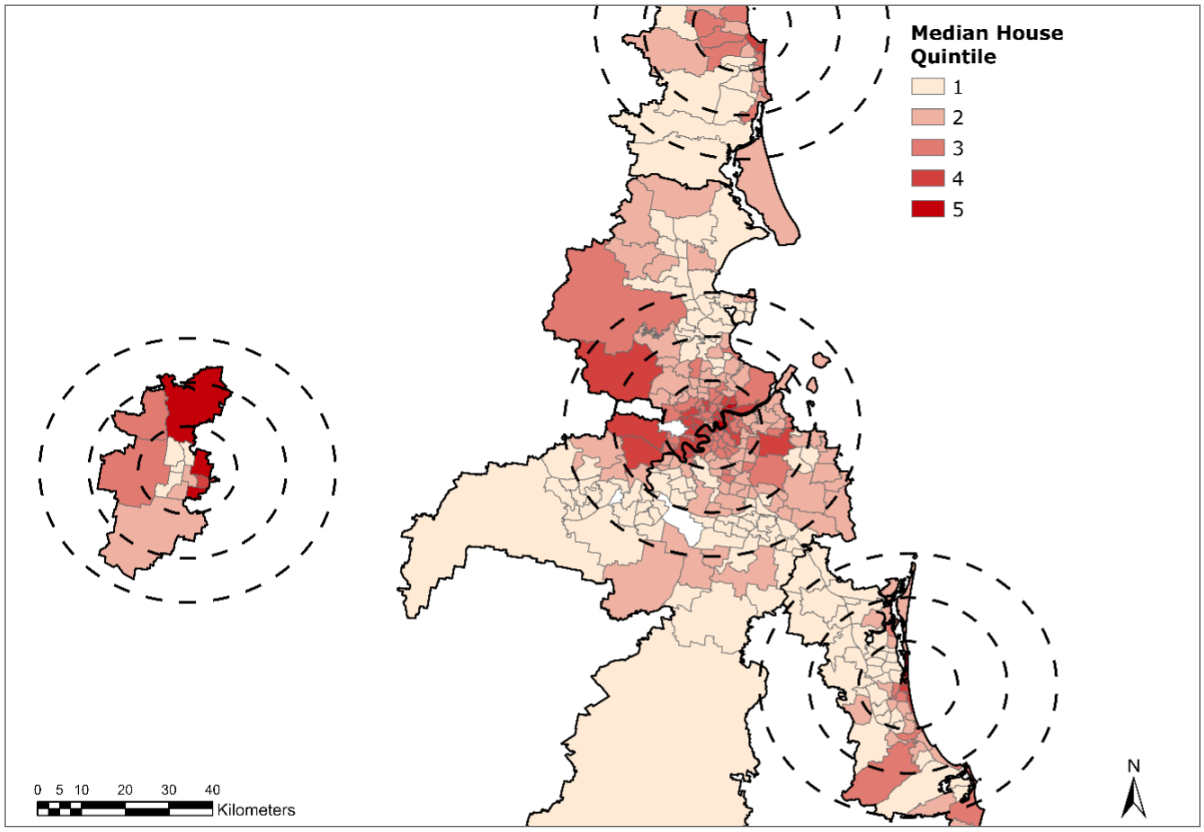


Source: APM (2024) and authors' calculations.

According to the median house quintile patterns across south-east Queensland, the highest quintiles (4–5) are concentrated in Brisbane's inner city and along desirable riverfront locations. The Gold Coast shows high values along its coastal strip, while the Sunshine Coast demonstrates moderate to high values (3–4), particularly in its coastal areas. Toowoomba displays higher values in its established eastern suburbs near the foothills, with lower quintiles in its outer regions. Lower quintiles (1–2) are generally found in Brisbane's outer western and southern regions, as well as in areas further from the coast, in both the Gold Coast and Sunshine Coast regions.

When comparing housing and amenity patterns, there is a notable correlation between high-amenity scores and high-house prices in Brisbane's inner city and along the Gold Coast's coastal strip. However, some high-value residential areas, particularly in Brisbane's outer north and parts of the Sunshine Coast, maintain elevated house prices despite more modest amenity scores. Toowoomba shows an interesting pattern in which amenity scores are concentrated in its CBD, while housing values peak in different areas, suggesting other factors are the predominant influence for property values in these regional markets. The outer areas of all four SUAs consistently show lower scores across both metrics, highlighting the relationship between distance from major centres and both house prices and amenities.

Figure 11: Median house price quintiles in Brisbane, the Gold Coast, the Sunshine Coast and Toowoomba SUAs



Source: APM (2024) and authors' calculations.

4.3.2 Correlations between prices and amenities

To quantify these observed spatial patterns and extend our analysis nationwide, we examine the correlation between property prices and amenity scores across all states and territories. This allows us to test whether the relationships observed in major metropolitan areas hold true across different geographical contexts and housing types. Table 17 presents these correlations, calculated using the SA2-level measures of amenity quintiles against median prices, and calculated separately for detached houses and units.

The first eight rows present these correlations for each state and territory. The final three rows show national figures: the overall Australian correlation, followed by correlations split between metropolitan areas (within capital city boundaries) and regional areas. The analysis reveals varying relationships across jurisdictions and housing types. South Australia and Victoria show the strongest positive correlations, particularly for houses (SA: 0.45, Vic: 0.40), while the Northern Territory shows negative correlations for both houses (−0.12) and units (−0.21).

Detached houses show stronger positive correlations with the amenity index compared to units across most jurisdictions, with the national average correlation for houses (0.25) being nearly double that of units (0.13). This is consistent with the above figures, which showed that units within Melbourne, Sydney and Brisbane were not as concentrated within the CBD and inner suburbs, thus were not typically co-located near the areas with the highest amenities. While some research (e.g. Cervero and Duncan 2002) notes that amenities play a role in driving multi-family housing, no research, to our knowledge, delves into the role that amenities play in relative price differences between detached and multi-family housing.

There is also a clear divide between metropolitan and regional areas. At the national level, we see moderate positive correlations in metropolitan areas between housing prices and amenities (houses: 0.36, units: 0.19) whereas we see slight negative correlations in regional areas (houses: −0.04, units: −0.06). These results may appear surprising given that there appeared to be a close correlation among the coastal cities in New South Wales and Queensland, yet those were largely the exceptions, not the rule. These metropolitan and regional differences suggest that the variations observed across states and territories largely reflect the degree of urbanisation in the SA2s where the amenity index was measured. In particular, given the relatively low density of regional areas, co-locating housing within the same area may not be as important.

Table 17: Correlation between median price quintiles and amenity index quintiles by region

	Houses	Units
NSW	0.34	0.20
Vic	0.40	0.21
Qld	0.15	0.08
WA	0.24	0.23
SA	0.45	0.35
Tas	0.14	−0.06
NT	−0.12	−0.21
ACT	0.20	−0.11
Australia	0.25	0.13
Metropolitan	0.36	0.19
Region	−0.04	−0.06

Source: House price data obtained via APM (2024); amenity index constructed using data obtained from OSM (2022); authors' calculations.

4.4 Policy development implications

With the creation of a national dataset, designed specifically to be based on local contexts and to rank small areas based on those contexts, a tool exists that allows for the locational aspects of housing to be assessed nationally at a neighbourhood level. Though purely focused on service access, this can be used to show good (or bad) locational context, which is important for locating social housing, particularly if best practice is to be followed, for example, regarding the placement of new units that ensure that tenants, especially those with reduced vehicular mobility, have access to services.

The tool also allows researchers to explore the existing context of social housing and to establish the areas that should be sold or redeveloped, on the assumption that properties in high-amenity areas should be maintained for redevelopment, and those in low-amenity areas should not. As the analysis is conducted at the SA2 or neighbourhood level, it allows the micro-locational attributes of social housing to be determined. Though the exact population of SA2s varies, the ABS puts the average at roughly 10,000 people, which largely discounts issues of resource competition locally. Moreover, the tool shows where services are – or are not – located within each SA2, making them good or poor choices for new social housing.

While the method has proved reasonably accurate, there are some issues of under- and over-reporting that raised or lowered the amenity ranking of some areas. Ideally, a federal body would work towards creating a constant dataset across state jurisdictions, aligning state-based features of interest so as to facilitate a seamless analysis of cities and regions. As these datasets already capture commercial sites, transport and administration centres, natural services and sites of social infrastructure (though to varying degrees of accuracy and content), their incorporation into a unified dataset is achievable.

In the face of inter-jurisdictional data discrepancy, it may be that a national perspective is not necessary and that existing state datasets, using real social housing data and not ABS approximations, may be the best approach.

The comparison between amenity levels and housing prices reveals potential strategic opportunities for social housing investment. Areas that combine relatively low-housing prices with high-amenity scores could offer optimal locations for social housing, maximising resident access to services and facilities while maintaining cost-effectiveness.

5. Amenity access and social housing: identifying strategic investment areas

- **There is a clear inverse relationship between initial social housing stock levels in 2006 and subsequent growth rates over the following 15 years that suggests some level of strategic disposal to reduce concentrations of social housing.**
- **There are no clear linkages between social housing growth and levels of amenity.**
- **Analysis suggests a systematic approach of selling detached social housing in high-value areas and reinvesting in higher density social housing in lower value areas.**

Chapter 5 explores the outcomes of using the amenity index to quantify the locations of social housing. Using select examples, it shows where social housing is well located and where it is not. In doing so, it provides insight into the distribution of social housing that may assist policy makers in identifying where social housing should be located in the future, acknowledging that not all housing can be well located.

5.1 Existing research

The relationship between social housing and amenities has evolved significantly in Australia, shaped by changing policy approaches and a growing understanding of their interdependence. Historically, early public housing estates suffered from poor amenity access, as documented by Arthurson (2008) in developments like Salisbury North in the 1950s and Doveton in Victoria (Bryson and Thompson 1972). This initial oversight of essential facilities contributed to social isolation and negative reputations. However, by the 1970s, policy had shifted towards smaller-scale estates and integration of social housing with community infrastructure, schools and other essential services.

Recent research has deepened our understanding of the significance of service access in multiple ways. Reid, Kraatz et al. (2024) developed a comprehensive framework that identifies the importance of place-based features and accessibility elements; however, they emphasise that implementation must be tailored to specific project contexts and community needs. The impact of social housing and amenity co-location varies significantly, as demonstrated by McCrea and Walters (2012) through their comparative study of Brisbane suburbs. They found that responses to densification and social housing varied markedly between inner-city West End and outer-suburban Wynnum. These differences were shaped by local identities, existing infrastructure and community values.

Research in Melbourne by Raynor, Panza et al. (2020) and Patulny and Morris (2012) reveals that proximity to community facilities plays a crucial role in fostering social integration. Social housing residents tend to rely more heavily on local amenities and services compared to private residents, with these institutional supports facilitating more diverse social networks. However, the research emphasises that mere physical co-location is insufficient – the quality of facilities and how they facilitate interactions matters more.

International research provides additional insights. Köberl, Wurm et al.'s (2024) analysis of German housing estates demonstrates how different planning paradigms affect amenity accessibility. Their findings highlight the importance of estate size and planning principles in determining service access, with 'urbanity by density' approaches showing superior outcomes compared to low-density developments.

Nygaard, van den Nouwelant et al. (2022) add an important economic dimension to this discussion. Their analysis of filtering processes in Melbourne and Sydney demonstrates that market mechanisms alone cannot address low-income housing needs, emphasising the continued importance of deliberate social housing policy. Their work supports mixed-tenure developments as a strategy for maintaining both housing affordability and amenity access in high-cost areas.

This body of research reveals that the relationship between social housing and amenities is bidirectional and complex, with historical planning approaches continuing to influence contemporary outcomes. Successful integration requires attention to both physical infrastructure and social dynamics, while local context significantly shapes the effectiveness of co-location strategies. Policy frameworks must balance multiple considerations, including market forces, social integration and community needs to create sustainable and equitable housing solutions.

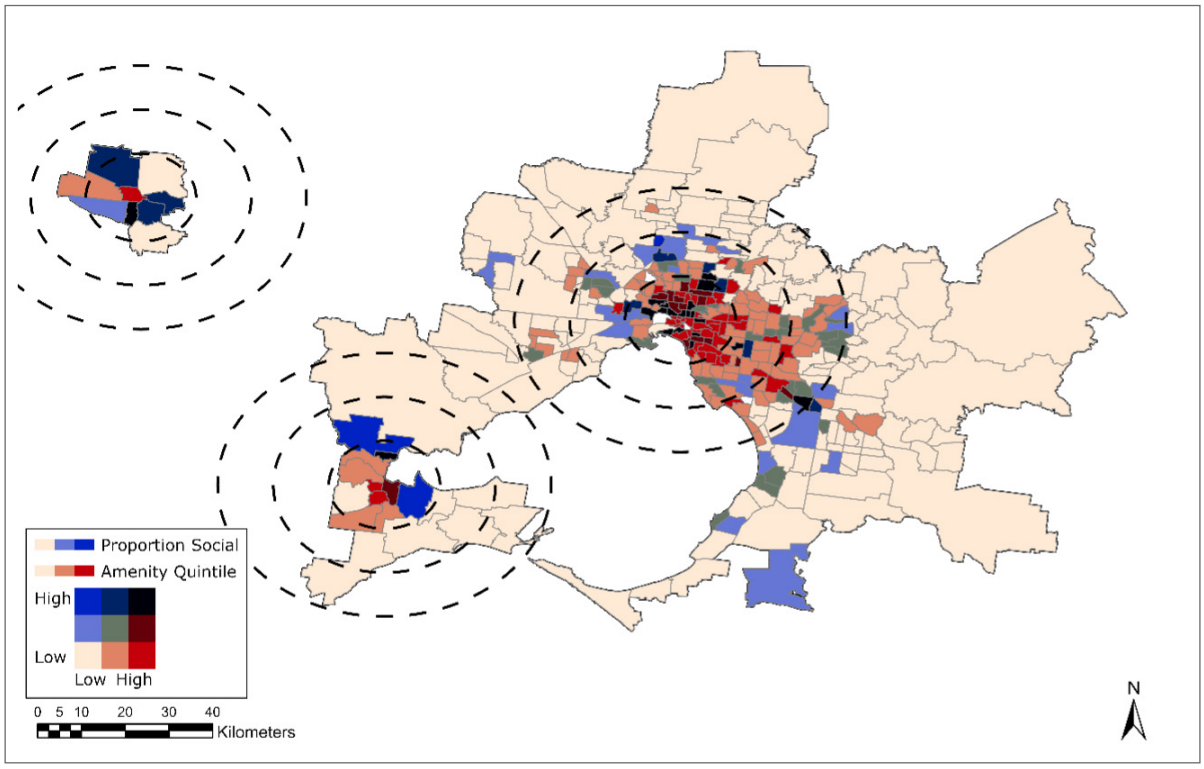
5.2 Mapping the relationship between social housing and amenity

Below are a number of maps examining the spatial relationship between social housing proportions and amenity levels across the Melbourne, Sydney and Brisbane SUAs at the SA2 level. Through a series of bivariate choropleth maps, we analyse how the distribution of social housing aligns with access to the amenities index. The analysis reveals distinct patterns within and between cities, highlighting both similarities and differences in how social housing intersects with urban service provision. Beginning with Melbourne, Geelong and Ballarat, we systematically examine each major urban area to understand the geographic nuances of this relationship. This analysis provides insights into the varying degrees of amenity access for social housing residents across different urban contexts and metropolitan regions. Additional bivariate choropleth maps of the other capital cities are found in Appendix 2.

The bivariate choropleth map in Figure 12 reveals a complex spatial relationship between social housing proportions and amenity levels across SA2s in Melbourne, Geelong and Ballarat. While Melbourne's central business district (CBD) contains little social housing, the inner-northern and western suburbs of Melbourne exhibit a notable concentration of areas with both high-amenity levels and higher proportions of social housing, as indicated by the dark red and black shading, suggesting that many social housing developments in the core have good access to urban amenities. However, this pattern becomes more varied in the middle and outer suburbs. The eastern suburbs maintain high levels of amenities yet typically have low levels of social housing. Some counter-examples exist, such as housing within St Kilda, Prahran and Armadale. Among the middle to outer suburbs, again we see declining levels of both amenities and social housing concentrations, although notable levels of both can be found in the north around Preston and Reservoir, and in the east around Dandenong. However, some outer suburbs near the airport and around Dandenong contain high levels of social housing, but low levels of local amenities, as indicated by the blue shading. This indicates that social housing does not have a direct impact on levels of amenity, nor amenity on social housing locations, per se; in other words, there is no causality for areas being of greater or lesser amenity due to incidences of social housing.

In Geelong, the pattern differs from Melbourne, indicating that areas with the highest concentrations of social housing do not correlate with higher amenities. However, there appears to be a stronger correlation within Ballarat.

Figure 12: Distribution of social housing and amenities across Melbourne, Geelong and Ballarat SUAs

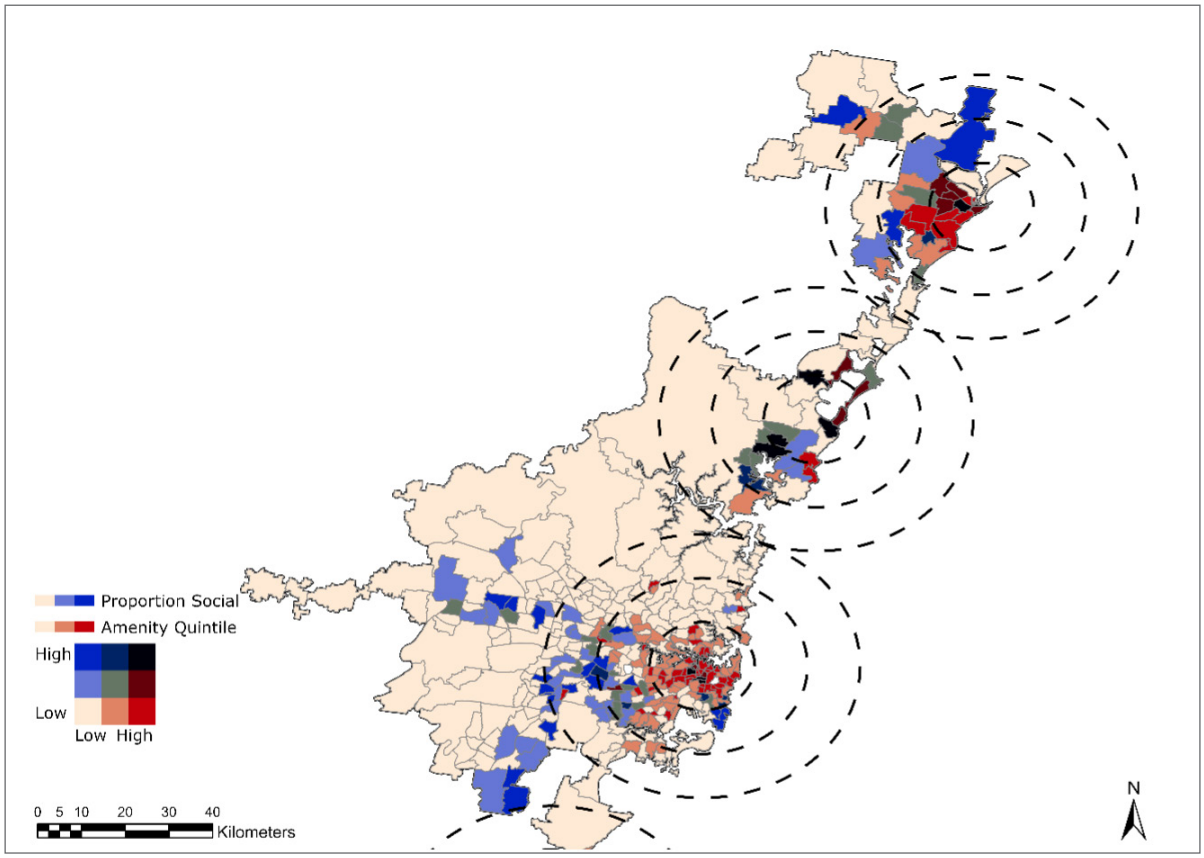


Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Figure 13 shows the bivariate relationship between social housing proportions and amenity levels across SA2s for Sydney, Newcastle and the Central Coast. Eastern Sydney, particularly around the harbour and coastal areas, shows high-amenity levels (indicated in red) but generally lower proportions of social housing, reflecting the area's high property values and established infrastructure. However, as may be expected, gentrifying neighbourhoods such as Redfern and Glebe have high concentrations of social housing and amenities. In contrast, western Sydney exhibits several clusters of high social housing proportions (shown in blue) with lower amenity levels, particularly notable in areas around the Canterbury–Bankstown and Western Sydney regions.

The pattern extends to Newcastle and the Central Coast (in the north of the map), where there are pockets of high social housing proportions with mixed amenity levels. The majority of the map's outer regions show lighter shading (beige/cream colours), indicating both lower proportions of social housing and lower amenity levels, which is characteristic of less densely developed areas with fewer established services and infrastructure.

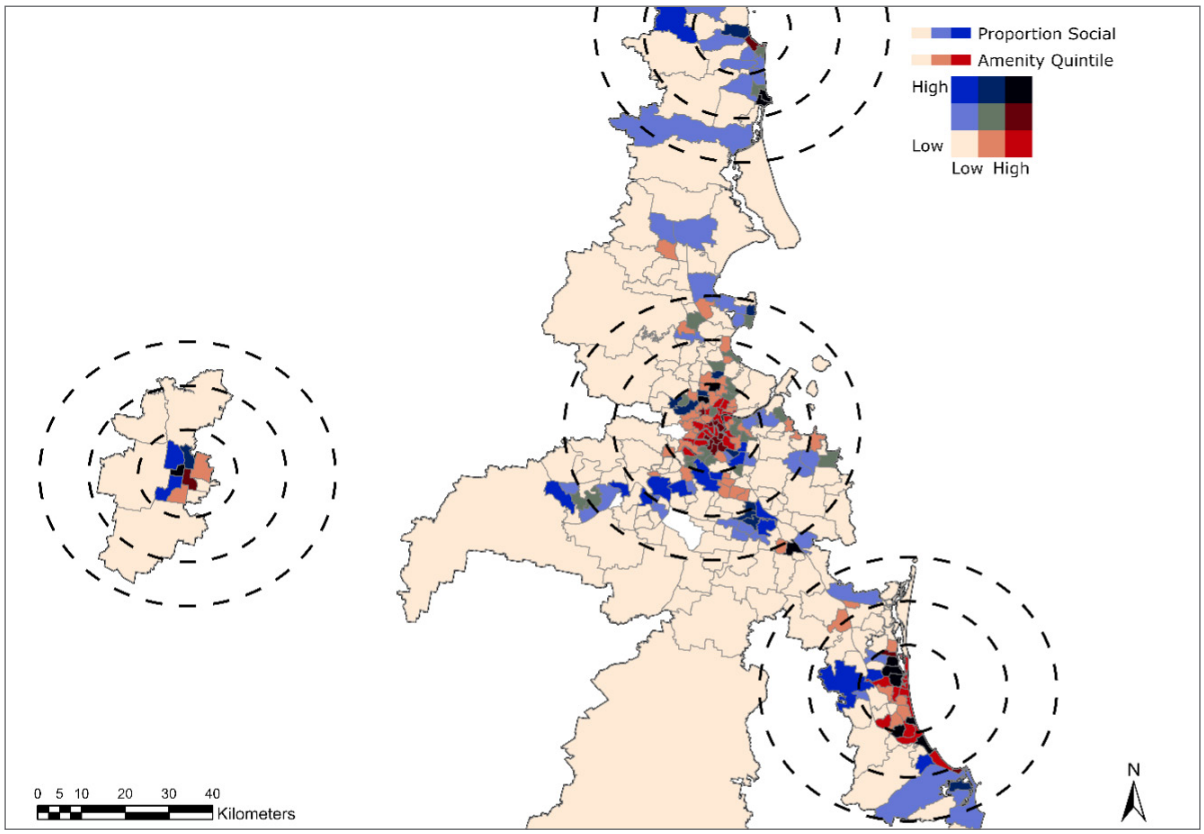
Figure 13: Distribution of social housing and amenities across Sydney, the Central Coast and Newcastle SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The bivariate relationship between social housing proportions and amenity levels across SA2s for Brisbane, the Gold Coast, the Sunshine Coast and Toowoomba is shown in Figure 14. In inner Brisbane, areas with higher proportions of social housing generally align with higher amenity levels, particularly evident in several darker shaded SA2s near the CBD. As with Sydney and Melbourne, the CBD itself has low levels of social housing. Moving to middle-ring Brisbane suburbs, social housing clusters show more variable amenity levels, with some areas having moderate- to low-amenity access (as seen in the various shades of blue). The Gold Coast has several distinct areas of high social housing proportion along its coastal strip, most of which coincide with moderate- to high-amenity levels. In contrast, Toowoomba's social housing areas mostly show lower amenity levels, while the scattered areas of social housing in the Sunshine Coast region show mixed amenity outcomes.

Figure 14: Distribution of social housing and amenities across Brisbane, the Gold Coast, the Sunshine Coast and Toowoomba SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

5.3 Exploring the relationship between the amenity index and social housing change

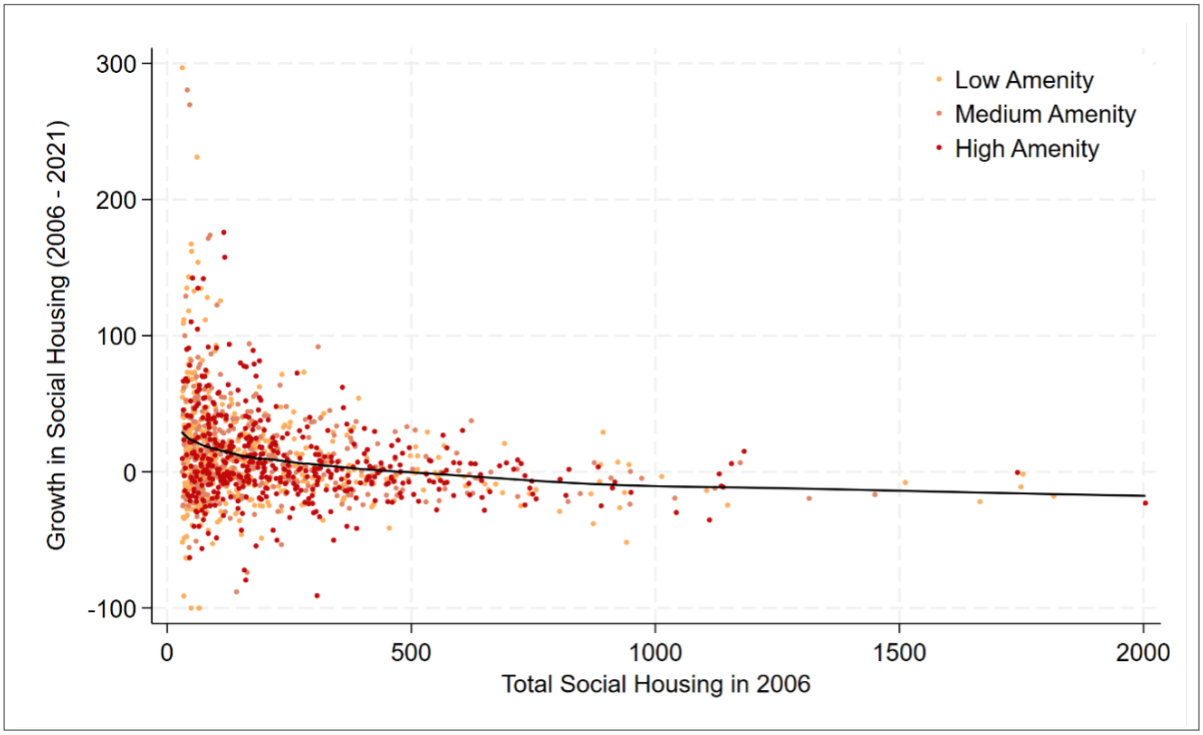
Having identified social housing supply by amenity we can now map the complex spatial relationships between social housing change over time and urban amenities across Australia's major metropolitan areas, examining both current patterns and changes over time. The analysis employs bivariate choropleth mapping to reveal how the distribution of social housing intersects with access to urban amenities.

The investigation is structured in two parts: first, we examine the contemporary relationship between social housing proportions and amenity levels in 2021; second, we analyse how social housing growth between 2006 and 2021 relates to amenity access. This dual approach allows us to understand both the current state of social housing distribution relative to urban services and how this distribution has evolved over a 15-year period.

The analysis encompasses all major Australian cities, from the largest metropolitan areas of Sydney, Melbourne and Brisbane to smaller but significant urban centres like Darwin, Hobart and Alice Springs. Through detailed spatial examination, we uncover distinct patterns within and between cities, highlighting both commonalities and differences in how social housing intersects with urban service provision across various Australian contexts. This comprehensive approach provides valuable insights into the equity of amenity access for social housing residents and the strategic placement of social housing developments over time.

This section begins with an examination of the relationship between initial social housing levels in 2006 and subsequent growth patterns through 2021, analysed at the SA2 level across Australia. The analysis excludes SA2s with fewer than 30 social housing dwellings in 2006. Each SA2 is categorised into three amenity tiers, represented through a graduated red colour scheme: low amenity (comprising the first and second quintiles), medium amenity (third quintile) and high amenity (fourth and fifth quintiles).

Figure 15: Scatterplot between total social housing stock in 2006 and subsequent growth of social housing between 2006 and 2021 by level of amenity



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

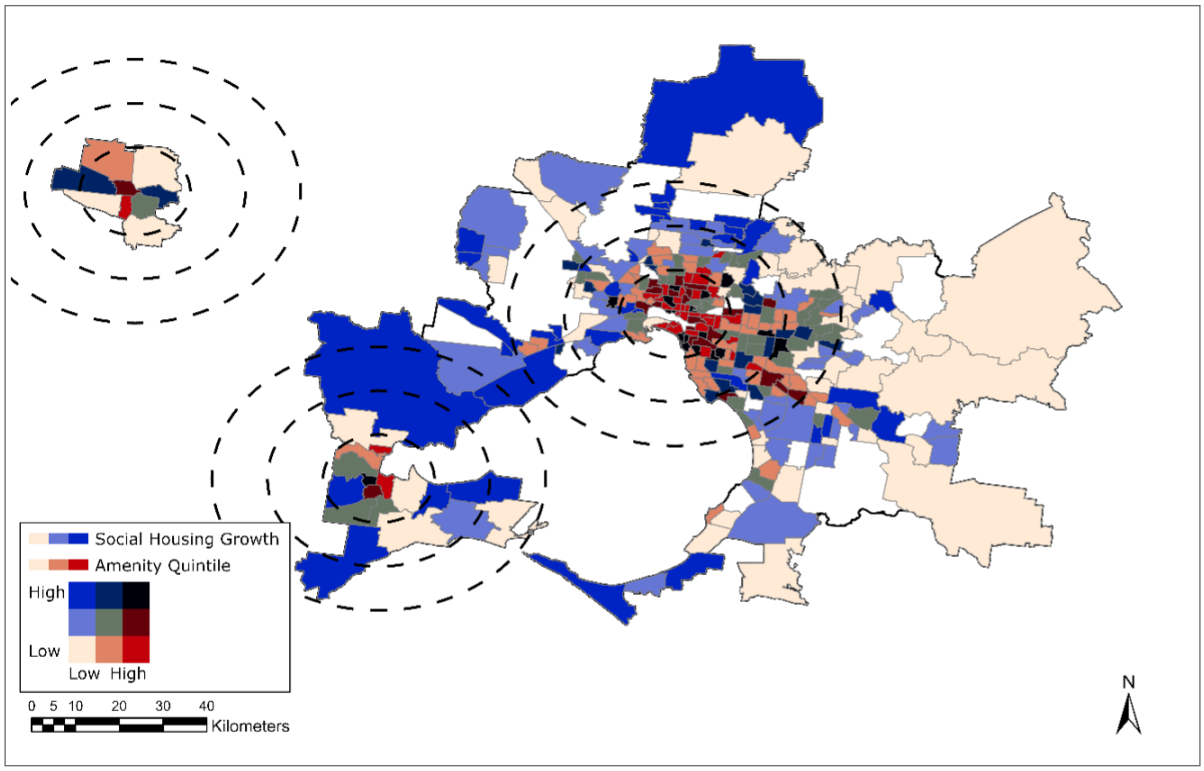
The scatterplot analysis in Figure 15 reveals two key patterns. First, there appears to be no strong systematic relationship between amenity levels and baseline social housing stock, though some SA2s experiencing the highest growth rates tend to be situated in areas with lower amenity levels. Second, and more notably, there exists a clear inverse relationship between initial social housing stock levels in 2006 and subsequent growth rates over the following 15 years. The fitted local linear regression line demonstrates that growth rates generally decline and eventually become negative as initial stock levels increase. This pattern aligns with policy objectives promoting greater social mix within communities, suggesting a deliberate shift away from areas of concentrated social housing towards more dispersed distribution patterns.

5.4 Social housing growth and amenity

A subsequent analysis examined the strategic placement of social housing in relation to amenity levels. The investigation focused on SUAs containing five or more SA2s, analysing the relationship between social housing growth in 2006–21 and 2021 amenity levels. To account for the low initial social housing stock in outlying areas, the sample was winsorised (limiting extreme variables) before plotting the relationship between these variables for each Australian capital city, although SA2s with particularly low baseline stock levels were nonetheless removed to allow for meaningful visual relationships in the figures. Within the figures, a low value for social housing growth generally indicates negative growth between 2006 and 2021.

Based on the bivariate choropleth map shown in Figure 16, there appears to be a complex spatial relationship between social housing growth (2006–21) and amenity levels across SA2s in Melbourne, Geelong and Ballarat. In core urban areas, particularly inner Melbourne, high-amenity areas demonstrate mixed patterns of social housing change, with some regions showing significant decline (bright red) while others exhibit strong growth (black shading). The outer suburbs display inconsistent patterns. These are particularly evident in eastern Melbourne, where areas of medium amenity experienced both growth and decline in social housing stock. Urban fringe locations show high social housing growth rates, largely reflecting their undeveloped status in 2006, though some eastern fringe SA2s with low amenities experienced social housing decline. The regional centres of Ballarat and Geelong experienced social housing growth in their CBDs, surrounded by SA2s showing varied relationships between amenity levels and social housing change.

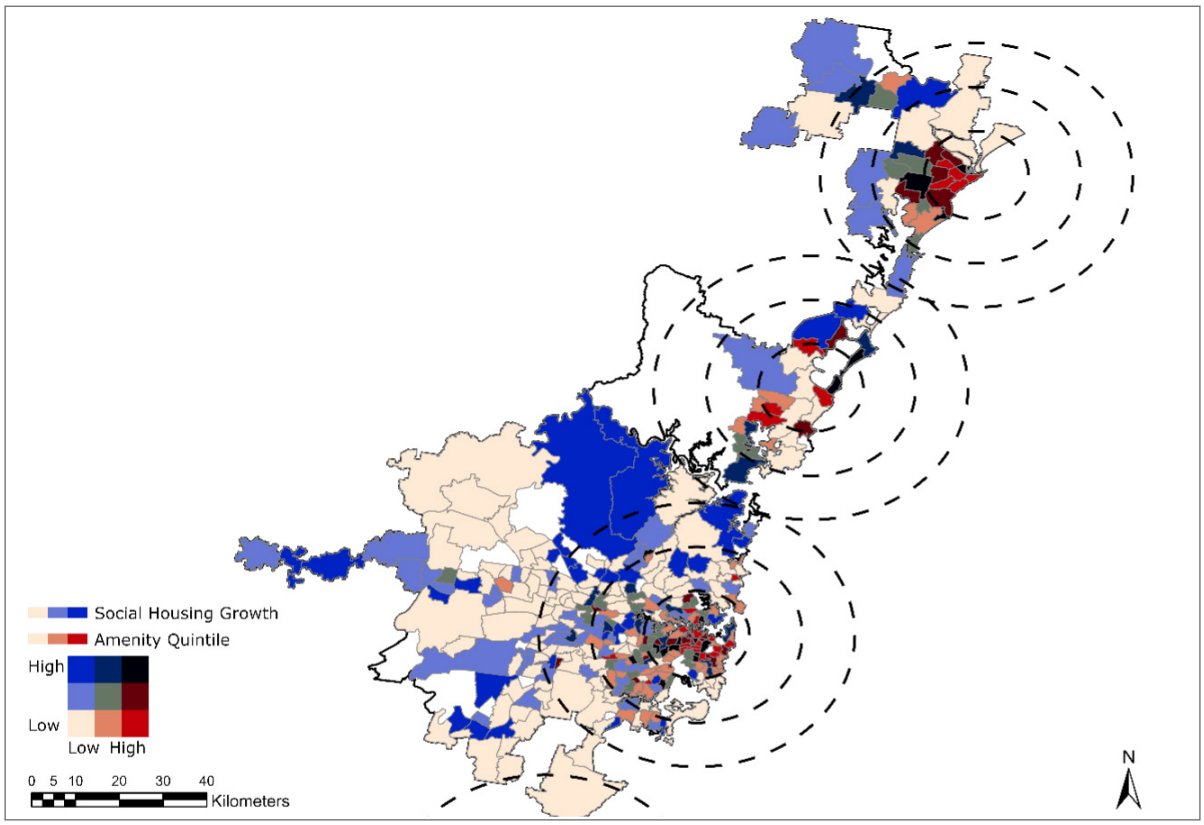
Figure 16: Distribution of social housing growth and amenities across Melbourne, Geelong and Ballarat SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Figure 17 presents a bivariate choropleth map examining the relationship between social housing growth (2006–21) and amenity levels across Sydney's SA2s. The spatial patterns mirror those observed in Melbourne, with high-amenity areas in the CBD and inner suburbs showing polarised outcomes – either significant social housing growth (black shading) or decline (bright red). Outer-suburban regions in the north, west and south, characterised by lower amenity levels, predominantly experienced declining social housing stock. In contrast, the Blue Mountains region demonstrates positive social housing growth. Newcastle exhibits similar spatial relationships to the broader Sydney pattern, particularly in the distribution of social housing change across areas of varying amenity levels.

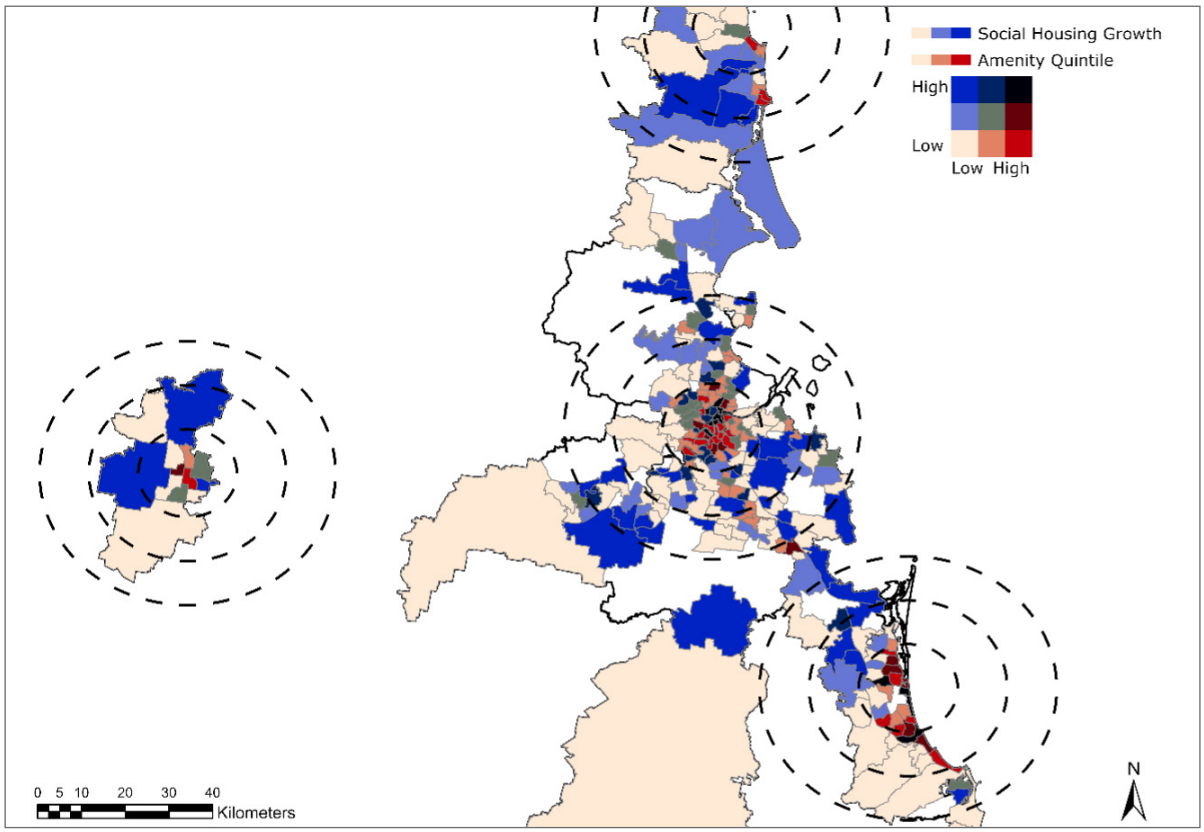
Figure 17: Distribution of social housing growth and amenities across Sydney, the Central Coast and Newcastle SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Figure 18 reveals a more distinct spatial relationship between social housing growth (2006–21) and amenity levels across Brisbane's SA2s. A clear north–south divide is evident, with inner-northern suburbs demonstrating high social housing growth (black shading), while inner southern regions experienced decline. The Gold Coast coastal SA2s generally show positive social housing growth, though with notable exceptions. Outer-suburban and fringe areas display varied patterns of social housing change, with no clear relationship to amenity levels.

Figure 18: Distribution of social housing growth and amenities across Brisbane, the Gold Coast, the Sunshine Coast and Toowoomba SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The remaining maps appear in Appendix 2. The analysis reveals complex and varied spatial relationships between social housing growth and amenity levels across Australia's capital cities between 2006 and 2021. A consistent pattern emerges in several capital cities, particularly Melbourne, Sydney and Perth, where high-amenity inner-urban areas demonstrate polarised outcomes, suggesting that they are experiencing either significant growth or decline in social housing stock.

Adelaide presents a notable exception, with widespread decline in inner areas and growth concentrated in less serviced outer regions. The relationship in outer-suburban areas is generally inconsistent across all cities, though many fringe areas show high growth rates, partly reflecting their minimal social housing stock in 2006.

Regional centres like Ballarat, Geelong, and Newcastle display their own distinct patterns, often with social housing growth in their CBDs but varied relationships in surrounding areas. These diverse patterns suggest that recent social housing growth has not consistently aligned with amenity access, reflecting the complex interplay of policy decisions, land availability and development opportunities across different urban contexts.

The reality is that not all social housing growth – and the same applies to private market housing – can be accommodated within existing urban areas. This is likely to become more pronounced as social housing growth accelerates in the future. The challenge, as with private market housing, is how to bring amenity to these less concentrated outer-urban areas.

5.5 Evidence of strategic disposal of social housing

The regression analysis in Table 18 examines the relationship between changes in medium- or high-density housing units and detached social housing stock across Australian SA2 regions between 2006 and 2021. The decision to combine medium- and high-density social housing stock was made to explore whether densification was occurring in social housing in general. The regression model uses an interaction term between neighbourhood amenity levels (low, medium, high) and a binary indicator for whether detached social housing decreased in the SA2. The coefficients represent the average change in medium- or high-density dwellings, which we will subsequently define as multi-family dwellings, for each combination of amenity level and detached housing change.

The model is presented separately for areas that experienced increases versus decreases in detached dwellings, effectively splitting the sample based on the direction of detached housing stock change. The model is estimated separately for each state/territory and at the national level. This specification allows for the identification of potential strategic redevelopment patterns, particularly where decreases in detached housing are accompanied by increases in multi-family dwellings, which could indicate deliberate policy choices to redevelop social housing into higher density formats.

Table 18: Average change between 2006 and 2021 in multi-family dwellings by amenity level in capital city

	Detached dwellings increased			Detached dwellings decreased		
State	Low amenity	Medium amenity	High amenity	Low amenity	Medium amenity	High amenity
NSW	6.3	8.1	31.5*	44.7***	60.3***	44.0***
Vic	2.3	4.9	12.2	15.8	17.4*	3.4
Qld	13.8*	34.2*	25.3*	18.3***	27.1***	47.8***
SA	−65.0**	−29.8	−76.6***	−39.8*	−18.8	−1.5
WA	14.3	29.9*	-5.2	23.6	28.4	30.2***
Tas	6.0	−3.8	-9.3	3.3	10.0	18.8
NT	7.0	−28.0**	7.0	−10.0	3.5	−6.8
ACT	10.5	13.2	−19.2	9.5	−6.4	−10.7
Australia	2.6	12.6**	−2.3	23.2***	26.0***	19.0***

Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

*Note: ***, **, * indicate statistical significance at the 1 per cent, 5 per cent and 10 per cent level, respectively.*

Looking at areas where detached dwellings decreased (right columns), there is compelling evidence of strategic redevelopment in several jurisdictions. New South Wales shows particularly strong and statistically significant increases in multi-family dwellings across all amenity levels (44.7, 60.3 and 44.0 dwellings for low-, medium- and high-amenity areas, respectively, all significant at 1%). Queensland also demonstrates significant increases across all amenity levels where detached housing decreased, with the largest increase in high-amenity areas (47.8 dwellings, 1% significance).

In contrast, when examining areas where detached dwellings increased (left columns), the pattern is more mixed. South Australia shows significant decreases in multi-family dwellings (−65.0 and −76.6 dwellings in low- and high-amenity areas, respectively), suggesting a potential shift away from higher density housing in these areas.

At the national level, there is strong evidence of strategic redevelopment. In areas where detached dwellings decreased, there were statistically significant increases in multi-family dwellings across all amenity levels (23.2, 26.0 and 19.0 dwellings, all significant at 1%). This pattern strongly suggests a systematic approach to redeveloping detached social housing into higher density dwellings; this is particularly pronounced in New South Wales and Queensland. However, there does not appear to be any consistent effort towards redevelopment in higher amenity neighbourhoods.

Table 19 extends the analysis by examining average changes in multi-family social housing stock between 2006 and 2021, using an interaction between 2006 median housing price levels (low, medium, high) and a binary indicator for whether detached social housing decreased in the SA2. The coefficients represent the average change in multi-family dwellings for each combination of price level and detached housing change. The model is estimated separately for areas where detached dwellings increased versus decreased, and for each state/territory and nationally.

Table 19: Average change between 2006 and 2021 in multi-family dwellings by 2006 median housing price in capital city

	Detached dwellings increased			Detached dwellings decreased		
State	Low value	Medium value	High value	Low value	Medium value	High value
NSW	14.0	17.0	0.2	53.8***	35.0**	9.3
Vic	5.7	9.7	6.3	23.9***	−1.7	−46.2**
Qld	24.3***	22.0**	26.6**	25.6***	32.6***	1.8
SA	−71.5***	−74.0**	−42.3	−30.4*	24.1	−49.4
WA	9.4	-8.3	−3.0	31.0***	18.3	17.5
Tas	4.4	-8.0	−6.0	0.4	−2.5	58.5**
NT	−12.0	−44.0***	7.0	−2.4	−15.3*	0.0
ACT	−2.4	−8.0	---	10.5**	−43.5***	−82.8***
Australia	5.2	2.7	1.3	27.5***	18.2**	−19.7*

Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).
*Note: ***, **, * indicate statistical significance at the 1 per cent, 5 per cent and 10 per cent level, respectively.*

Looking at the evidence for strategic disposal and reallocation patterns, several compelling trends emerge. In areas where detached dwellings decreased, New South Wales shows significant increases in multi-family dwellings in low- and medium-value areas (53.8 and 35.0 dwellings, respectively, significant at 1% and 5%), but no significant change in high-value areas. Victoria demonstrates an interesting pattern of significant increases in low-value areas (23.9 dwellings, 1% significance) but significant decreases in high-value areas (−46.2 dwellings, 5% significance), consistent with strategic reallocation from high- to low-value areas. Like New South Wales, Queensland shows significant increases in low- and medium-value areas (25.6 and 32.6 dwellings, respectively, both at 1% significance), while the Australian Capital Territory shows a clear pattern of value-based disposal, with significant increases in low-value areas (10.5 dwellings, 5% significance) but large decreases in medium- and high-value areas (−43.5 and −82.8 dwellings. respectively, both at 1% significance).

At the national level, there is clear evidence of strategic reallocation: significant increases in multi-family dwellings in low- and medium-value areas (27.5 and 18.2 dwellings, respectively) where detached housing decreased, but a significant decrease in high-value areas (−19.7 dwellings). This pattern suggests a systematic approach of selling detached housing in high-value areas and reinvesting in increased multi-family housing in lower value areas. This is particularly pronounced in Victoria and the Australian Capital Territory, where the contrast between increases in low-value areas and decreases in high-value areas is most stark.

5.6 Policy development implications

The analysis reveals several important patterns that have direct implications for social housing policy development. First, the strong correlation between amenities and house prices within metropolitan areas, our proxy for land prices, suggests that policies aimed at increasing social housing in high-amenity areas could face significant financial barriers where pre-existing land assets do not already exist. This is especially challenging given that more than 70 per cent of high-amenity locations in New South Wales, Victoria, Queensland and Western Australia have less than 5 per cent social housing, indicating substantial gaps in provision where amenities are strongest. Policies that continue to leverage planning mechanisms such as inclusionary zoning or density bonuses, possibly in combination with tax breaks or interest rate subsidies, are likely necessary to overcome the price barrier in high-amenity locations.

6. Social housing requirements and delivery

- Social housing data from the ABS Census differ significantly from Australian Institute of Health and Welfare data, underestimating the amount of social housing by almost 20 per cent.
- If social housing is to comprise at least 5 per cent of total housing stock in all states/territories, an additional 137,684 social housing dwellings are required immediately. This could cost $60 billion.
- The proportion of social housing within high-amenity locations varies significantly across the country, from 57 per cent in Western Australia to 22 per cent in New South Wales.
- In New South Wales, Victoria, Queensland and Western Australia, more than 70 per cent of high-amenity locations have less than 5 per cent social housing.
- For Australia to achieve at least 5 per cent of social housing across all SA2s within a decade, an annual provision of approximately 25,000 dwellings would be required.
- The supply of social housing can be increased by selling a proportion of separate social housing dwellings to the private sector and using the funds to redevelop publicly owned assets.
- High-amenity/high-value SA2s are best placed to leverage their existing low-density social housing assets.

This chapter explores the under/over provision of social housing across states and territories and within selected SA2 urban areas. Analysis switches to state/territory level to include some interesting examples of significant urban areas that fall outside capital cities. Using a benchmark of 5 per cent social housing as a proportion of stock – a stretch target for the whole of Australia that would help address some of the unmet housing needs of low-income Australians – we calculate how many new social housing dwellings are needed to reach this target. Calculating social housing provision and shortfalls in areas of varying amenity, we estimate the annual social housing dwelling requirements necessary to reach the 5 per cent target and identify those locations with high amenity that could support new social housing development. Given the extent of new social housing necessary, we also explore a way of leveraging existing separate social housing assets to increase net social housing supply.

6.1 Social housing shortfalls

The Australian Institute of Health and Welfare (AIHW) recorded around 440,000 social housing dwellings across Australia in 2023, consisting of public housing, community housing, Indigenous community housing and state-owned and managed Indigenous housing (AIHW 2024b). This is an increase from the 432,000 social housing dwellings recorded in 2021. These figures differ significantly from ABS Census data figures for state or territory housing authority and community housing provider dwellings. These dwellings are identified by individuals on census night, and many households may record their tenure under a different category.

Table 20 compares the census and AIHW data by state/territory for 2021, including an estimate of social housing as a proportion of total stock, a key metric used for analysis within this chapter.

The proportions by state/territory in 2021 range from 2.7 per cent in Victoria up to 10 per cent in the Australian Capital Territory, with 4 per cent of total housing stock across Australia being social housing. Census data show similar patterns, but actual numbers are up to 29 per cent lower in New South Wales, and 85,820 lower across Australia. The significant variation in social housing availability across states/territories reflects historic government investment in public housing, the scale of the community housing sector and particular cohort needs.

Table 20: Social housing dwellings 2021

	NSW	Vic	Qld	SA	WA	Tas	ACT	NT	Aust
AIHW (total social housing)	159,527	80,611	72,086	46,572	42,615	14,361	11,829	12,591	440,192
Census (total social housing)	122,261	61,866	62,303	39,221	36,588	11,846	9,707	10,382	354,372
Difference	37,266	18,745	9,783	7,351	6,027	2,515	2,122	2,209	85,820
Difference (%)	23%	23%	14%	16%	14%	18%	18%	18%	19%
Total housing stock 2021	3,364,802	2,810,815	2,195,595	808,379	1,150,416	259,318	96,564	187,153	10,875,248
Social housing as a % of total stock (AIHW)	4.74%	2.87%	3.28%	5.76%	3.70%	5.54%	12.25%	6.73%	4.05%
Social housing as a % of total stock (Census)	3.63%	2.20%	2.84%	4.85%	3.18%	4.57%	10.05%	5.55%	3.26%

Source: AIHW (2024b), ABS (2023).

Assuming a social housing target of 5 per cent of total stock, it is possible to identify the current shortfall in social housing within states/territories. While 5 per cent is a somewhat arbitrary figure, it represents a step towards meeting some of the significant unmet need identified in Chapter 1. To do this we use 2023 social housing data from AIHW and calculate a total dwelling stock figure for the same year by increasing 2021 census total stock by the number of dwelling completions for the intervening period. The proportion of social housing declines slightly in most states/territories as the delivery of social housing over the two years is proportionally less than market housing. For those states/territories below 5 per cent, using AIHW data (NSW, Vic, Qld, WA), the shortfall from 5 per cent is calculated and displayed in Table 21. The shortfall is greatest in Victoria at over 65,500 dwellings, while the Australian Capital Territory has over 7,600 dwellings above the 5 per cent level. For Australia as a whole, to ensure all states/territories are above 5 per cent, ignoring those already above the level, would mean an additional 137,684 dwellings.

Various assumptions can be made about the cost of delivering the shortfall in social housing depending on available land, funding subsidies and construction costs; however, making a very basic, and conservative assumption that each dwelling would cost A$500,000 to construct, regardless of location, the total expenditure across Australia would be A$68.8 billion. While some of this new social housing could be delivered on government-owned land, some land acquisition from the private sector would also be necessary, significantly increasing the cost of delivery. Granted this analysis is simplistic; however, it nevertheless illustrates the shortfall in social housing across much of Australia and the sort of expenditure required to rectify the problem.

Table 21: Social housing shortfalls

	NSW	Vic	Qld	SA	WA	Tas	ACT	NT	AUS
Number of social housing dwellings (AIHW 2023)	159,900	82,846	73,378	45,908	43,364	14,972	12,522	12,732	445,622
Total stock 2021 (census)	3,364,802	2,810,815	2,195,595	808,379	1,150,416	259,318	96,564	187,153	10,873,042
Dwelling completions 2021–23	127,914	159,015	92,790	30,765	42,088	9,026	1,627	13,084	476,309
Total stock estimate 2023	3,492,716	2,969,830	2,288,385	839,144	1,192,504	268,344	98,191	200,237	11,349,351
Social housing (proportion of total stock)	4.58%	2.79%	3.21%	5.47%	3.64%	5.58%	12.75%	6.36%	3.93%
Shortfall from 5%	14,736	65,646	41,041	−3,951	16,261	−1,555	−7,612	−2,720	137,684
Cost of delivering shortfall (assume A$500k per dwelling)	A$7.4bn	A$32.8bn	A$20.5bn	-	A$8.1bn	-	-	-	A$68.8bn

Source: AIHW (2024b), ABS (2023; 2024a).

6.2 Meeting social housing targets

Using census SA2 data and assuming a minimum target of 5 per cent social housing in each SA2, we calculate the average social housing requirement per annum if SA2s were to reach this target at the end of a 10-year investment period. We assume that total stock grows at 2 per cent per annum (slightly lower than the federal government's ambitious 1.2 million dwelling target). An SA2 with a current 3 per cent social housing proportion would need to increase to 5 per cent of the end total stock level in 10 years. For example, if current social housing was 100 units and total stock 5,000 units that would be a proportion of 2 per cent. After 10 years, total stock will have risen to 6,095 units; therefore, to meet the 5 per cent requirement, social housing would need to reach 305 units, a rise of 205 units or around 20 units per annum.

With 77 per cent of SA2s below 5 per cent social housing as a proportion of total stock, significant numbers are required to meet the target. Our modelling shows that 1,505 SA2s require a combined supply of 300,000 social housing dwellings, or 30,000 per annum, to meet the 10-year target. This is an average of around 20 units per annum in each of the SA2s, a massive investment requirement for government. Noting that census data underestimate social housing numbers by around 20 per cent, the actual requirement will be lower at around 25,000 dwellings per annum based on 440,000 current social housing dwellings and 2 per cent per annum stock growth. This growth would not be even, of course, as some SA2s are already above the 5 per cent threshold while others are well below.

Table 22 breaks down the annual social housing requirement by state in high-, mid- and low-amenity locations. Western Australia has the largest requirement for high-amenity areas, as it has the least high-amenity SA2s with existing social housing above 5 per cent, closely followed by Victoria. By contrast, high-amenity areas already exceed 5 per cent social housing in Tasmania. For mid-amenity areas, the requirement in Victoria is way ahead of other states/territories at an average of 23 units per SA2, while mid-amenity SA2s in South Australia are already above 5 per cent. Given the relative number of low-amenity SA2s, figures are much higher across the country, although, as discussed previously, these low-amenity SA2s are not the ideal locations for social housing.

Table 22: Dwelling requirements per state/territory to meet 5 per cent social housing

High amenity	Number of SA2s	Net social housing dwellings per annum to reach 5% in each SA2	Average per SA2
NSW	80	1,082	13.5
Vic	83	1,577	19.0
Qld	73	915	12.5
SA	30	142	4.7
WA	89	1,584	17.8
Tas	16	−711	−44.4
NT	17	−20	−1.2
ACT	36	84	2.3

Mid-amenity	Number of SA2s	Net social housing dwellings per annum to reach 5% in each SA2	Average per SA2
NSW	99	1,037	10.5
Vic	120	2,791	23.3
Qld	99	1,034	10.4
SA	24	−194	−8.1
WA	34	539	15.9
Tas	11	0	0.0
NT	13	4	0.3
ACT	29	58	2.0

Low amenity	Number of SA2s	Net social housing dwellings per annum to reach 5% in each SA2	Average per SA2
NSW	309	3,712	12.0
Vic	214	4,788	22.4
Qld	262	2,021	7.7
SA	62	490	7.9
WA	79	1,033	13.1
Tas	36	29	0.8
NT	16	9	0.6
ACT	57	65	1.1

Source: ABS (2023), APM (2024), authors' calculations.

6.3 Social housing and amenity

The relationship between social housing and amenity was mapped in the previous chapter. We return to this theme at the state/territory level, examining whether high-amenity areas contain the highest proportions of social housing, thereby enabling tenants to benefit from access to amenities, and to what extent high-amenity areas fall below the 5 per cent benchmark.

The following tables examine social housing supply in high-, mid- and low-amenity areas, concentrating on those SA2 urban areas with less than 5 per cent social housing as a proportion of total housing stock. For New South Wales, Victoria, Western Australia and Queensland, 70 per cent or more of high-amenity locations have less than 5 per cent social housing, indicating a strong opportunity to increase provision in these locations. In Tasmania and the Northern Territory, only around 40 per cent of high-amenity SA2s have less than 5 per cent social housing. The biggest gaps in well-located social housing are therefore in New South Wales, Victoria and Queensland.

Looking at the proportion of total social housing within high-amenity areas, the top performer is Western Australia, with 57 per cent of all social housing dwellings located in high-amenity areas, despite almost 80 per cent of these high-amenity SA2s having below 5 per cent social housing. This suggests a concentration of social housing in Western Australia; examining individual SA2s shows that the concentration is largely in urban areas outside Perth, notably in the north-west. In New South Wales and Queensland, only around one-fifth of social housing is located in high-amenity areas. The best performers outside Western Australia are the Australian Capital Territory and the Northern Territory.

Table 23: State/territory level provision of social housing: high-amenity locations

High amenity	Number of SA2s	Number of social housing dwellings	Proportion of all social housing	Number below 5% social housing	Proportion below 5% social housing
NSW	80	24,181	22%	56	70%
Vic	83	19,347	35%	62	75%
Qld	73	11,935	23%	51	70%
SA	30	11,863	33%	18	60%
WA	89	16,500	57%	70	79%
Tas	16	3,207	32%	6	38%
NT	17	1,827	48%	6	35%
ACT	36	4,052	40%	18	50%

Source: ABS (2023) and authors' calculations.

For mid-amenity areas, Victoria fares even worse, with 93 per cent of its mid-amenity SA2s having less than 5 per cent social housing, slightly higher than Western Australia at 85 per cent, while New South Wales does somewhat better at 69 per cent. Once again, South Australia performs strongly, having more than 5 per cent social housing within two-thirds of its mid-amenity SA2s.

Table 24: State/territory level provision of social housing: mid-amenity locations

Mid-amenity	Number of SA2s	Number of social housing dwellings	Proportion of all social housing	Number below 5% social housing	Proportion below 5% social housing
NSW	99	6,155	25%	68	69%
Vic	120	17,347	31%	111	93%
Qld	99	14,705	28%	75	76%
SA	24	10,360	29%	8	33%
WA	34	4,753	16%	29	85%
Tas	11	1,839	18%	6	55%
NT	13	1,082	29%	5	38%
ACT	29	2,348	23%	18	62%

Source: ABS (2023) and authors' calculations.

Finally, we look at low-amenity areas. One would expect much lower proportions of social housing in such locations, as the poor access to essential amenities would be potentially problematic for tenants. While there are very high proportions of low-amenity areas with less than 5 per cent social housing in Victoria, Western Australia and Queensland, around 25 per cent of low-amenity areas in New South Wales and South Australia, and around 40 per cent in Tasmania, the Northern Territory and the Australian Capital Territory, have more than 5 per cent social housing. In New South Wales, Queensland and Tasmania, around half of all social housing is located in low-amenity areas. The best performer is the Northern Territory with 23 per cent, Western Australia with 26 per cent and Victoria with 34 per cent of social housing in low-amenity areas.

Table 25: State/territory level provision of social housing: low-amenity locations

Low amenity	Number of SA2s	Number of social housing dwellings	Proportion of all social housing	Number below 5% social housing	Proportion below 5% social housing
NSW	309	60,843	54%	227	73%
Vic	214	18,895	34%	200	93%
Qld	262	25,415	49%	230	88%
SA	62	12,973	37%	47	76%
WA	79	7,611	26%	71	90%
Tas	36	5,130	50%	22	61%
NT	16	878	23%	10	63%
ACT	57	3,805	37%	36	63%

Source: ABS (2023) and authors' calculations.

Examining individual SA2s, we can identify examples of high-amenity locations with low proportions of social housing and see how the proportions have changed between 2006 and 2021. Table 26 shows the density characteristics of SA2s by examining the proportion of separate houses in each location. The higher the proportion of separate housing, the lower the density. The table shows the top five (largest) high-amenity, low–social housing areas in each state/territory. These are all locations where states and territories should be looking to increase the supply of social housing. The majority of locations are high-value areas (as identified by the median house quartile), with the exception of the Australian Capital Territory. In terms of density, in New South Wales, Victoria, the Australian Capital Territory and Queensland, they are high-density locations, and in South Australia they are as high-density as such areas get. In contrast, in Western Australia, with the exception of Scarborough, and Tasmania, they are low-density areas. The vast majority of SA2s have seen a slight decrease in the proportion of social housing during the 15-year period, which is to be expected given the relative levels of market and social housing development.

Table 26: High-amenity locations and low–social housing provision

	Total housing stock 2021	Proportion social housing	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
NSW					
Sydney (South) – Haymarket	10,077	0.3%	5	0.1%	0%
Bondi Beach – North Bondi	10,443	1.2%	5	–0.1%	9%
North Sydney – Lavender Bay	7,712	0.6%	5	–2.2%	5%
Chatswood – East	8,549	1.1%	5	–0.1%	24%
Dee Why – North	8,529	1.2%	5	–0.5%	10%
Vic					
Melbourne CBD – West	13,313	0.3%	1	0.3%	0%
Southbank – East	12,339	0.1%	3	0.1%	0%
Melbourne CBD – North	13,092	0.6%	1	–1.3%	0%
Docklands	10,790	1.0%	4	1.0%	1%
Caulfield – North	10,361	1.1%	5	0.0%	34%
Qld					
Mermaid Beach – Broadbeach	10,125	0.3%	5	0.2%	8%
Surfers Paradise South	9,689	0.4%	5	0.4%	9%
Surfers Paradise North	8,966	0.5%	5	0.1%	6%
Brisbane City	7,561	0.3%	4	–0.1%	5%
Newstead – Bowen Hills	11,327	2.4%	5	–1.7%	4%
SA					
Glenelg	10,934	2.0%	5	–1.5%	40%
Burnside – Wattle Park	8,030	0.8%	5	–0.1%	72%
Toorak Gardens	7,591	1.9%	5	–0.2%	53%
Unley – Parkside	9,253	3.0%	5	–0.6%	55%
Goodwood – Millswood	8,024	2.8%	5	–0.1%	59%
WA					
Morley	9,703	1.4%	3	0.4%	83%
Canning Vale – East	7,645	0.2%	3	–0.1%	92%
Scarborough	9,143	1.4%	4	–0.2%	34%
Melville	7,023	0.4%	5	0.1%	75%
Karrinyup – Gwelup – Carine	8,155	1.3%	5	–0.9%	86%

Table 26 (continued): High-amenity locations and low–social housing provision

	Total housing stock 2021	Proportion social housing	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
Tas					
Sandy Bay	5,459	0.8%	5	–0.8%	67%
Launceston	2,672	1.6%	5	0.2%	53%
Newstead	2,473	1.6%	5	–1.5%	75%
Norwood	1,700	1.4%	4	0.5%	88%
West Hobart	2,871	3.7%	5	–0.3%	76%
NT					
Darwin City	4,098	1.2%	5	–2.5%	1%
Nightcliff	1,795	1.7%	5	–2.6%	34%
Palmerston – North	1,624	2.0%	2	–0.5%	86%
Rapid Creek	1,511	2.3%	5	–0.3%	39%
Larrakeyah	1,745	3.0%	5	–0.9%	20%
ACT					
Kingston	4,193	1.1%	5	–3.2%	3%
Civic	2,488	0.2%	-	–2.9%	0%
Bruce	2,963	1.1%	3	0.8%	20%
Franklin	2,850	1.0%	3	–4.5%	48%
Queanbeyan	5,627	3.7%	1	0.3%	40%

Source: ABS (2023), APM (2024), authors' calculations.

Low-amenity areas with high concentrations of social housing are almost exclusively in low-value areas. The proportion of social housing in such areas has generally fallen over the 15-year period, potentially indicating some form of disinvestment strategy designed to reduce social housing concentrations. The vast majority of SA2s are low-density locations, some with levels of social housing above 15 per cent, although concentrations are falling in all such locations. This could be a strategic decision, or it could reflect increased market development in these areas, reducing the proportion of social housing with the number of overall units staying the same.

Table 27 shows an increase in the number of social housing dwellings in the largely regional areas of Western Australia. By contrast, South Australia shows a significant drop in the number of social housing dwellings in its five SA2s. The situation is slightly more complex elsewhere, with some SA2s experiencing a reduction in social housing and others witnessing an increase in social housing, but a proportional fall due to greater levels of market housing. Overall, there are no clear patterns across the states/territories, but some consistency within them.

Table 27: Low-amenity locations with high social housing provision

	Total housing stock 2021	Proportion social housing	Change in social housing dwellings 2006–21	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
NSW						
Ashcroft – Busby – Miller	6,202	27.8%	-29	1	-3.4%	80%
Bidwill – Hebersham – Emerton	6,455	24.1%	-193	1	-4.9%	84%
Lethbridge Park –Tregear	7,559	19.7%	-324	1	-16.1%	85%
Lurnea – Cartwright	4,313	19.4%	144	1	-0.2%	71%
Macquarie Fields	5,119	18.6%	-152	1	-3.8%	70%
Vic						
Corio – Lovely Banks	7,238	7.6%	-62	1	-1.5%	92%
Meadow Heights	4,768	7.3%	-18	1	-1.0%	81%
Newcomb – Moolap	7,126	6.3%	41	1	-0.4%	86%
Moe – Newborough	8,460	6.2%	-36	-	-1.3%	82%
Mildura – North	8,423	6.2%	-47	2	-1.5%	76%
Qld						
Wacol	1,027	23.1%	-25	1	-5.2%	87%
Inala – Richlands	6,971	20.0%	-118	1	-9.8%	75%
Riverview	1,171	17.6%	-113	1	-11.8%	96%
Rocklea – Acacia Ridge	3,970	10.9%	4	1	-1.1%	85%
Coopers Plains	2,317	9.8%	60	3	0.7%	73%
SA						
The Parks	7,695	16.9%	-364	2	-8.9%	66%
Hackham West – Huntfield Heights	3,427	15.8%	-181	1	-7.9%	87%
Whyalla	10,911	14.2%	-460	-	-6.5%	53%
Port Augusta	6,215	10.7%	-222	-	-5.1%	78%
Elizabeth East	5,663	10.1%	-233	1	-5.6%	81%
WA						
Broome	5,822	13.6%	184	-	-2.6%	79%
South Hedland	4,941	11.8%	223	-	0.1%	66%
McKail – Willyung	4,508	7.6%	111	1	-0.1%	95%
Karratha	7,230	6.6%	1	-	-4.3%	75%
Geraldton	6,225	6.3%	-90	1	-2.4%	73%

Table 27 (continued): Low-amenity locations with high social housing provision

	Total housing stock 2021	Proportion social housing	Change in social housing dwellings 2006–21	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
Tas						
Bridgewater – Gagebrook	3,304	29.9%	66	1	–4.3%	90%
Ravenswood	1,705	25.2%	13	1	–1.4%	79%
Newnham – Mayfield	3,893	12.9%	0	1	–2.4%	78%
West Ulverstone	1,942	9.5%	–8	-	–2.1%	90%
Wynyard	3,025	9.0%	11	4	–2.9%	90%
NT						
Moulden	1,208	17.3%	–67	1	–5.8%	81%
Ludmilla – The Narrows	1,029	15.5%	–46	3	–2.0%	68%
Larapinta	1,958	10.4%	34	1	0.4%	71%
Berrimah	472	9.7%	9	1	0.8%	68%
Ross	887	8.8%	20	5	–0.8%	84%
ACT						
Richardson	1,172	11.4%	–35	1	–3.0%	96%
Rivett	1,387	11.2%	28	2	1.5%	86%
Canberra East	328	10.4%	–4	1	1.4%	52%
Taylor	676	10.2%	69	3	10.2%	82%
Oxley	653	10.1%	–17	2	–2.7%	92%
Gilmore	1,000	8.5%	–19	2	–2.3%	93%

Source: ABS (2023), APM (2024), authors' calculations.

Table 28 shows a clear pattern at the state/territory level. South Australia experienced a significant reduction in the number of social housing dwellings in low-amenity SA2s, while Victoria, Queensland and Western Australia saw a big increase, with more modest increases in New South Wales, Tasmania and the Australian Capital Territory. However, as South Australia saw a big reduction in all social housing dwellings across the 15-year period, this may not have been a strategic decision. In high-amenity areas (Table 27), there were large increases in five of the eight states/territories, with reductions in South Australia, the Northern Territory and the Australian Capital Territory.

Table 28: Social housing dwelling change 2006–21 in low-amenity SA2s

State	Number of low-amenity SA2s	Change in number of units	Social housing dwellings	Change as % of total units in low-amenity SA2s
NSW	309	1,280	62,567	2.0%
Vic	214	1,681	18,895	8.9%
Qld	262	2,069	25,415	8.1%
SA	62	−2,810	13,002	−21.6%
WA	79	1,157	7,629	15.2%
Tas	36	232	5,130	4.5%
NT	16	4	878	0.5%
ACT	57	255	3,805	6.7%

Source: ABS (2023) and authors' calculations.

Table 29: Social housing dwelling change 2006–21 in high-amenity SA2s

State	Number of high-amenity SA2s	Change in number of units	Social housing dwellings	Change as % of total units in high-amenity SA2s
NSW	80	1,396	22,928	6.1%
Vic	83	1,015	19,347	5.2%
Qld	73	1,846	11,935	15.5%
SA	30	−918	11,863	−7.7%
WA	89	760	16,500	4.6%
Tas	16	271	3,207	8.5%
NT	17	−212	1,827	−11.6%
ACT	36	−423	4,052	−10.4%

Source: ABS (2023) and authors' calculations.

6.4 Delivering social housing through asset disposal

Table 30 provides 10 examples of annual social housing requirements for high-amenity SA2s across each state/territory. To put the figures in perspective, at a modest cost per dwelling of A$500,000, building 50 dwelling per annum would amount to an investment of A$25 million per annum.

Table 30: Dwelling requirements per SA2 to meet 5 per cent social housing

	Number of units required to meet 5% social housing
NSW	
Sydney (South) – Haymarket	59
Bondi Beach – North Bondi	51
North Sydney – Lavender Bay	43
Chatswood – East	43
Dee Why – North	42
Paddington – Moore Park	41
Bondi – Tamarama – Bronte	39
Terrigal – North Avoca	38
Randwick – North	38
Double Bay – Darling Point	36
Vic	
Melbourne CBD – West	78
Southbank – East	74
Melbourne CBD – North	71
Docklands	55
Caulfield – North	52
South Yarra – North	51
Malvern – Glen Iris	48
Glen Waverley – East	46
Carnegie	44
Toorak	44
Qld	
Mermaid Beach – Broadbeach	59
Surfers Paradise – South	55
Surfers Paradise – North	50
Brisbane City	44
Newstead – Bowen Hills	42
South Brisbane	41
Burleigh Waters	31
Currumbin – Tugun	31
Coorparoo	30
St Lucia	28
ACT	
Kingston	21
Civic	15
Bruce	15
Franklin	14
Queanbeyan	13
Campbell	11
Phillip	10
Gungahlin	9
Braddon	8
Belconnen	6

	Number of units required to meet 5% social housing
SA	
Glenelg	45
Burnside – Wattle Park	43
Toorak Gardens	32
Unley – Parkside	29
Goodwood – Millswood	26
Colonel Light Gardens	25
Rostrevor – Magill	22
Henley Beach	21
Plympton	21
Brighton	21
WA	
Morley	45
Canning Vale – East	45
Scarborough	43
Melville	40
Karrinyup – Gwelup – Carine	39
South Perth – Kensington	39
Nedlands – Dalkeith – Crawley	36
Victoria Park – Lathlain – Burswood	35
Success – Hammond Park	34
Willetton	33
Tas	
Sandy Bay	29
Launceston	12
Newstead	11
Norwood	8
West Hobart	7
Burnie – Wivenhoe	4
NT	
Darwin City	20
Nightcliff	8
Palmerston – North	7
Rapid Creek	6
Larrakeyah	5
Leanyer	4

Source: ABS (2023), APM (2024), authors' calculations.

One way to reduce the cost of delivering social housing is to redevelop existing public housing (see Khor, Taylor et al. 2023). Existing, low-density public housing assets can be leveraged to deliver additional social housing by selling a proportion to the private sector and using the funds generated, along with funding available from schemes such as the Housing Australia Future Funds Facility and National Housing Accord Facility to increase density and the overall net of social housing dwellings. While residents would be displaced in the short term and accommodation solutions would be required, the additional supply would deliver an overall benefit going forward. Density would be increased from detached dwellings to a medium-density housing product such as townhouses.

The analysis below makes a range of assumptions to calculate the number of additional social housing dwellings that could be leveraged from the sale of existing public housing dwellings, including:

- that the land is owned by the state/territory
- the total cost of constructing each dwelling
- the SA2 median house price in June 2024
- the percentage of the median house price a separate unit of public housing would command on sale
- that the overall percentage of separate dwellings does not exceed 90 per cent, indicating there is potential to deliver medium-density development
- that the subsidy available for the delivery of each unit is based on a percentage of total cost (e.g. 20% of A$600,000)
- the proportion of existing separate social housing units to redevelop (this could be 25%, meaning 25% of all separate social housing units are sold to the private sector and a further 25% are redeveloped, leaving 50% separate social housing dwellings untouched)
- the average land area of each separate social housing dwelling
- the minimum land area of each lot for redevelopment, as this limits the number of dwellings that can be developed on the land retained.

The model calculates the revenue from the sale of a proportion of separate social housing to the private sector and uses this revenue to deliver a maximum number of new, medium-density dwellings, the number being limited by proceeds for private sale, available land, the construction cost and available subsidy. A net increase/decrease in social housing dwellings is then calculated. The net gain varies based on the revenue proceeds from sale; therefore, higher value (often higher amenity) SA2s can leverage more new units than medium price areas. Areas with low house prices could not use this model, as the net number of units would actually fall because the revenue would be below the cost of dwelling replacement.

Table 31 presents results from four hypothetical locations with median house prices ranging from A$500,000 to A$1.25 million. There are three models based on three different sets of assumptions, as shown in Table 31. Table 32 presents the results.

Table 31: Model assumptions

	Model A	Model B	Model C
Unit cost	A$600,000	A$500,000	A$650,000
Unit subsidy (%)	25%	30%	20%
Median house price %	80%	85%	75%
Percentage of separate social housing to redevelop	25%	30%	20%
Land area m2	400.0	450.0	400.0
Min. land area	120.0	120.0	120.0

Source: Authors' calculations.

Table 32: Net increase in social housing dwellings from social housing sales

Model A				
House price	A$500,000	A$750,000	A$1,000,000	A$1,250,000
Total social housing units	150	150	150	150
Separate social housing dwellings	75	75	75	75
Separate units sold off	19	19	19	19
New social units developed	17	25	33	42
Net gain in social units	-2	6	14	23
% increase in social housing	-1%	4%	10%	15%

Model B				
House price	A$500,000	A$750,000	A$1,000,000	A$1,250,000
Total social housing units	150	150	150	150
Separate social housing dwellings	75	75	75	75
Separate units sold off	23	23	23	23
New social units developed	27	41	55	68
Net gain in social units	4	18	32	45
% increase in social housing	3%	12%	21%	31%

Model C				
House price	A$500,000	A$750,000	A$1,000,000	A$1,250,000
Total social housing units	150	150	150	150
Separate social housing dwellings	75	75	75	75
Separate units sold off	15	15	15	15
New social units developed	11	16	22	27
Net gain in social units	−4	1	7	12
% increase in social housing	−3%	1%	4%	8%

Source: ABS (2023), APM (2024), authors' calculations.

Each example in each of the three models has 75 separate social housing dwellings, a proportion of which is sold at the stated percentage of the median house price. The minimum land area for new dwellings remains the same. Model B, the best-case scenario, increases the social housing dwelling lot size for sale from 400m2 to 450m2. Model A sees a decrease in social housing dwellings when the median prices is A$500,000, a slight increase in net dwellings at A$750,000 and larger increases as the revenue from sales grows, up to 23 additional units, or a 15 per cent increase in total social housing, at a price of A$1.25 million. The more generous assumptions in Model B yield up to a 31 per cent increase in total social housing, while the tighter assumptions in Model C make redevelopment unviable below A$750,000 with only an 8 per cent increase at A$1.25 million.

Overall, the modelling shows the potential to leverage additional social housing from the sale of existing separate social housing assets. However, a number of factors need to be taken into account. For example:

- where and how to relocate displaced tenants
- that redevelopment is more difficult if separate social housing is scattered across an SA2 and not clustered to allow precinct-style development (Khor, Taylor et al. 2023)
- that subsidies would be needed to make redevelopment viable in all but the highest priced locations.

Appendices 3 and 4 provide examples from modelling at the SA2 level using two different assumptions, demonstrating a range of outcomes across states/territories that are dependent on market conditions and the volume of separate social housing available for development.

6.5 Policy development implications

This chapter has shown how, using AIHW figures, Australia is over 137,500 social housing dwellings short of meeting a 5 per cent minimum social housing target in all states/territories. To meet this 5 per cent target over a 10-year period would require the net addition of around 25,000 dwellings per annum. Given that social housing increased by only 2,260 dwellings per annum from 2006 (AIHW 2024b), this would involve a major turnaround. However, there are encouraging signs, with the Housing Australia Future Fund supporting around 40,000 social and affordable dwellings over the next five years. While federal government funding will address some of the need, state governments will also need to raise their current level of social housing spending to make a dent in the target. Leveraging existing low-density public housing assets to deliver medium-density social housing is one option to help meet the supply gap while minimising costs. Some low-density areas will be able to support high-density social housing, increasing further on the yields discussed above.

7. Policy development implications and options

Australia's social housing sector represents around 4 per cent of total housing stock and operates within a framework of shared responsibilities between federal, state and territory governments. While the majority of housing rests with state organisations (67%), the community housing sector has seen considerable growth (to 26% in 2023), which, combined with leveraged sales to both the community and private sector, has resulted in changes in ownership, location and tenure.

A number of federal initiatives have recently come to policy fruition, resulting in national agreements on the volume of housing needed and the budgets to achieve these, with the emphasis being on creating stock in well-located areas. But not every dwelling can be well located (i.e. in high-amenity areas), particularly if dwellings with extra bedrooms or in certain school catchments are required, or if we are to achieve a reasonably even distribution of dwellings nationally. Plus, the meaning of 'well located' has different meanings per city and town, to the point where it may not even be relevant in rural areas.

Added to this is the location and form of existing dwellings. Thirty-seven per cent of existing social housing dwellings are separate houses, the majority of which will have quite suburban (or rural) contexts, which, in Australia, often means they are poorly located in terms of access to services. This raises the question of whether these be retained, sold or redeveloped and how they can be best leveraged (if at all) to achieve greater housing volume.

In order to provide an assessment of the volume, location, housing typology, leveraging potential and change in social housing across these variables, this research undertook a national assessment of social housing, focusing on its location and potential value at the neighbourhood scale.

7.1 A reliable amenity and social housing dataset

Despite experiencing some data poverty, the project provides a national assessment of social housing location and change.[1]

Amenity datasets vary in coverage, classification and update frequency, contributing to gaps in data accessibility. Previous efforts have integrated datasets for individual cities (e.g. Glackin and Moglia 2022; Khor, Taylor et al. 2023), but these remain fragmented and difficult to scale nationally. In regional and remote areas, data are often incomplete or outdated. The ATO Business Register was considered; however, it was found to be unreliable due to unclear business locations, duplication and outdated records. Some proprietary datasets may offer high quality information but restrict access, limiting their usefulness for research and policy. OpenStreetMap (OSM) emerged as the most viable alternative, providing geocoded and categorised points of interest across Australia. While some gaps remain, OSM offers the most consistent dataset for national analysis, helping to address, though not fully resolve, amenity data poverty.

1 This would be far more effective with a consistent national dataset of access to amenities. Federal authorities should facilitate the creation of such a dataset with state data custodians.

Greater access to more accurate social housing data (at postcode or preferably Statistical Area 2 [SA2] level) would also benefit the sector. As indicated throughout this report, Australian Bureau of Statistics (ABS) figures differ from Australian Institute of Health and Welfare (AIHW) figures by categorising housing providers rather than specific programs. Key discrepancies include self-reporting errors, incomplete responses and misalignment between census housing categories and the four social housing types.

Micro-scale AIHW data, or a federal clearinghouse for social housing data research, would allow for greater accuracy of outcomes and greater strategic collaboration between government and academia. Given the current data-poor environment, particularly across state jurisdictions, an assessment of social housing would be far more efficient at a state-by-state, or even council level, if data were specific to that jurisdiction and it would also be far more effective in terms of strategising for future supply.

7.2 Utilising the amenity index for strategic decisions

Historically, the provision of social housing has largely been an issue of volume, with location being a secondary consideration. However, policy change regarding issues such as over-concentration, leveraging assets to achieve denser products and, significantly, the residualisation of the housing system have seen an international best practice evolve that necessitates good location as a significant element of housing services. This is because individuals currently in the social housing system may not have the capacity to travel far and would benefit from greater proximity to the services that higher amenity locations offer. Without metrics, the concept of 'well located' becomes a qualitative assessment. But if we consider the key aspects of location that would be of benefit to the cohorts in social housing, then quantifying location becomes a matter of indicating where services are plentiful and where they are not, and then aligning the location of housing with the better-serviced areas.

This is the rationale behind the amenity index. It provides neighbourhood areas with a score based on where they sit, in terms of service provision, within the greater city or town of which they are a part. By using the index, housing providers can clearly see whether social housing is well located or not. They can also see areas where future provision should occur. When social housing data are combined with the amenity index, areas that are well serviced that have a deficiency of social housing also become visible, thereby establishing future targets for investment in the interests of social equity, social mix and service access.

Outside of public housing, the amenity index also provides a mechanism for the provision of housing more generally. By placing more housing in areas that have relatively high service access, we are increasing the probability of walking, reducing the need for vehicular travel, increasing the health of the population and reducing negative environmental impacts. Counterwise, the index also shows areas that are in need of services, which, given the general increase in density that all cities are experiencing, would indicate areas that are in need of strategic planning to accommodate the requirements of growing populations.

The key strength of the amenity index, and its major point of departure from other such tools, is that it is constructed per city and relative to the general levels of access within that environment. Some cities have no rail, are more distributed than others and more car dependant, or generally have more provision of certain services than others. To compare cities and townships without acknowledging such differences would be to overlook the importance of local condition. For example, a poorly serviced area in Melbourne may score higher than a well-serviced area in Ballarat, making a comparison between the two areas contextually irrelevant. The index takes this local variation into account and provides a way to illustrate the distinction in locale in relation to other areas within the defined boundary of each greater city and town.

While the amenity index suffers from the data issues described above – all of which relate to the lack of a coordinated, inter-jurisdictional dataset defining points and features of interest, including businesses (such as shops and places of food/drink) – it nevertheless demonstrates the possibilities inherent in a single index that can be applied to all urban centres nationally, irrespective of size and state. Its comparative assessment of services (which can be refined based on subsectors of the client base or strategic aims of housing or planning authorities) provides clear data on areas that can easily accommodate specific demographics and populations, and areas that do not, and which may need attention into the future.

7.3 Social housing change over 15 years

The proportion of social housing in Australia dropped from 4.8 per cent in 2011 to 4.1 per cent in 2023 (AIHW 2024b). Our research shows that the modest increases in social housing volume occurring in all capital cities (with the exception of Adelaide) have not been enough to stem the reduction in market share, with, for example, Sydney falling 0.8 per cent, Melbourne 0.6 per cent and Perth 0.7 per cent. This downward trend is also occurring, and in some instances to a greater degree, in many rural centres (e.g. Mildura –1.7%, Albury–Wodonga –1.9%). These proportional falls are largely due to significant increases in private construction rather than a big reduction in social dwelling numbers. However, they do show a reduction in capacity across the sector and its ability to service the wider population, particularly as it increases.

The proportion of social housing varies greatly per location, particularly in rural and regional centres. Using New South Wales as an example, some centres, such as Wollongong, Newcastle, Nowra and Morwell, have social housing figures than exceed the national average, while others, such as the Central Coast and Broken Hill, are below average. NSW localities are generally showing significant transfers to community housing providers, but the outcomes vary. The Central Coast, for example, showed a loss of 228 public dwellings, an increase of 625 community dwellings and a net gain of 407 dwellings, all while suffering a 0.1 per cent market share loss, whereas Dubbo showed a loss of 165 public dwellings, an increase of 95 community dwellings and a net loss of 70 dwellings, resulting in a 1.9 per cent loss of market share. Hence, the outcomes are specific to the locality and not open to overarching explanation. However, in areas undergoing sale and transfer, there is a limit to how long these trends can continue, with some areas having just 30 years of transfers remaining until the volume of publicly controlled stock becomes zero.

7.3.1 Current typology

In terms of current (2021) dwelling typology, one finding was an under-representation of separate housing and an over-representation of medium-density (townhouses and low-rise apartments) dwellings in social housing compared to private dwellings. This was more pronounced in capital cities, but did not exclude regional centres. For example, Sydney has 52 per cent separate private dwellings, but only 28 per cent of social housing stock; on the Gold Coast and Brisbane, these figures are 53 per cent to 28 per cent, and 71 per cent to 45 per cent, respectively.

This relationship is inverted when we consider the proportion of medium-density dwellings in private stock as opposed to social housing stock. In Sydney, the figures are 28 per cent private to 58 per cent social, and on the Gold Coast and Brisbane they are 32 per cent to 64 per cent, and 21 per cent to 49 per cent, respectively. This is the same nationally, suggesting that optimisation of assets is occurring. Assuming that higher density housing generally has higher land value associated with higher amenity areas, then these dwellings are potentially better located than single units, though an assessment of quality, actual location and tenure blindness would need to be undertaken to validate this, as over-representation could also be indicative of poorer quality housing.

7.3.2 Typology change

In terms of typology change, there is a general trend towards densification, with four-plus-storey dwellings being constructed in all major urban centres. Such units are increasing by a factor of 10 or more in some cities. Most cities are showing divestment in detached housing (Sydney –17.5%, Brisbane –8.3%, Canberra –10%, Darwin –21%). While some cities are showing increases in detached housing, such as Melbourne (+13.5%), Perth (+1.5%) and Hobart (+8%), Melbourne is showing a large decrease in medium-density housing (–16.8) as it moves to higher density living, while Perth (+15%) and Hobart (+3%) are showing upswings in medium-density housing.

This is occurring as cities themselves densify, which may present opportunities for stock redevelopment as medium density becomes a more acceptable typology in the established suburbs and as high density is established around transit corridors and suburban centres. This appears to be occurring, with all cities showing divestment in lower density and lower Socio-Economic Indexes for Areas (SEIFA) locations. However, in most cities, the majority of stock remains in lower density and lower SEIFA locations. This raises questions about the timing of leveraging these assets when the local context is indicating that it is not immediately feasible (which is not to say it will not become feasible in the future, particularly as urban densification continues to spread).

In major centres, the future of social housing will be far denser than it has been to date. On the assumption that densification is, in part, a response to higher land values and amenity, this would mean that new social housing units would be better located than previously; however, it also means that social assets will largely be housing units and not land per se, ultimately negating future opportunities for land development.

The data also highlight that, despite numerous redevelopment programs over the last 15 years, the net addition to social housing stock has not been substantial and, in some cases, has resulted in actual stock displacement. If we are to substantially increase social housing numbers in line with future need and population growth, then the existing model of densification of high value uplift areas is not viable; there will simply be insufficient available land. This suggests that, parallel with the uplift model (the focus of this study), an additional model(s) and strategy is needed to accommodate growth.

7.4 Towards an even distribution of social housing?

This research adopted a stretch target for social housing of 5 per cent of total dwelling stock. As Chapter 6 identified, the shortfall is greatest in Victoria at over 65,500 dwellings, while the Australian Capital Territory has over 7,600 dwellings above the 5 per cent level. For Australia as a whole, to ensure all states/territories are above 5 per cent would mean an additional 137,684 dwellings at an estimated cost of A$69 billion.

The figure of 5 per cent represents a modest increase on the current proportion of social housing, which stands at 4 per cent using AIHW figures. The question remains: what is the desired level of social housing in Australia? Compared to nations such as the Netherlands, Austria and Denmark, where social housing constitutes over 20 per cent of the housing sector, and the UK, where it accounts for 16.4 per cent (OECD 2024), Australia is well short of where it needs to be. With waitlists for social housing generally increasing across the country, arriving at a position when a household in need of social housing can be readily provided with a suitable dwelling seems a very long way off. Even a modest reduction in waiting times would require a significant investment.

This research has shown how social housing is not evenly distributed across, or within, states and territories; nor is it concentrated in areas of high amenity that offer the types of services required by social housing tenants, such as public transport, quality schools, medical services and employment opportunities. At present, most social housing assets exist in lower density/SEIFA locations. Further, as Chapter 5 illustrated, there has been a pattern of disinvestment in high-amenity areas and investment in low-amenity areas. While this may make sense in terms of maximising the development outcomes from the sale of existing assets, it does not make sense from the point of view of tenant wellbeing.

This raises the question of how best to utilise existing public housing assets and when divestment should occur. Should agencies sell ageing assets, leverage assets in denser areas or potentially hold out and wait for gentrification/densification to arrive? The answer rests on policy and the immediacy of budget reporting to show benefit now or into the future. As indicated by Nygaard, Pinnegar et al. (2021), this is largely driven by market responses to large-scale land release and urban renewal projects. If the land value is not sufficient (yet) to redevelop at higher yields, then, for leveraged or mixed-tenure projects with some private product, it will not occur. Ongoing compact city policies make this a given over time. It remains to be seen how long authorities can wait.

The evidence of strategic disposal and reallocation of social housing stock presents both opportunities and risks for policy development. The clear pattern of selling detached housing in high-value areas and reinvesting in increased multi-family housing in lower value areas, particularly pronounced in Victoria and the Australian Capital Territory, indicates that housing authorities are already pursuing strategies to maximise the value of their assets. However, this approach appears to be contributing to a concentration of social housing in lower value, often lower amenity areas – exactly the opposite of what the evidence suggests would be most beneficial for tenants. This suggests a need for policies that better balance asset optimisation with tenant outcomes, potentially through requirements that any proceeds from sales in high-value areas must be reinvested within the same geographic area to maintain access to existing amenities.

The stark differences between metropolitan and regional areas in both the amenity–price relationship and social housing distribution patterns indicate a need for geographically differentiated policy approaches. While the strong amenity–price correlation in metropolitan areas suggests a need for strategic policies to secure social housing in well-serviced locations, the weaker relationship in regional areas offers opportunities for more market-based approaches. These regional differences also highlight the importance of developing locally tailored solutions rather than one-size-fits-all policies. This could include exploring opportunities in regional areas where land costs are lower and where it may not be as strictly necessary to co-locate amenities with housing. Such areas could potentially provide better value for money in expanding social housing supply while maintaining reasonable access to services.

7.5 Leveraging existing social housing stock

The practice of leveraging existing separate social housing dwellings by selling a proportion to the private sector and redeveloping a further proportion using the sale proceeds and funding from the federal government is examined in Chapter 6. This leveraging of existing public assets would work best in high-amenity, high-value areas, although these are not traditionally the preferred locations for social housing investment. Other medium-value areas could also leverage around 20 per cent more social housing, depending on model assumptions, and it is only in low-value, low-amenity areas where such redevelopment would not work.

Of course, there are multiple issues to consider with any social housing redevelopment, not least the temporary displacement of existing residents.

Our analysis only looked at the redevelopment of low-density social housing; however, our findings should be enough to persuade policy makers to explore how to use existing assets to leverage new assets. Indeed, previous research has shown how such practices have already occurred on a small scale (Khor, Taylor et al. 2023).

The advantage of redeveloping existing public housing assets is that government does not have the cost of purchasing the land. This substantially reduces the funding required to deliver social housing. Access to land is one of the biggest barriers to development by the community housing sector. Another way to access land for social housing would be through inclusionary zoning practices that can open up higher amenity locations for social housing development.

Since land values rise in line with dwelling prices, and provided construction costs do not rise faster, this presents a growing opportunity to leverage existing public sector assets. As urban policy towards densification expands, lower density suburbs containing low-density social dwellings will deliver opportunities to develop medium-density social housing. For areas that already high density, there are opportunities to redevelop existing social housing assets to take advantage of potential revenues from asset disposal.

One of the biggest barriers to social housing development is the displacement of existing tenants. The ability to rehouse, albeit temporarily, existing social housing tenants will impact sell-off rates. Sell and redevelop strategies would need to be carefully crafted to strike a balance between the delivery of new social housing and the welfare of existing tenants. The advantage of leveraging existing assets is, as development progresses, the capacity to rehouse displaced tenants. As that capacity increases, so does the proportion of existing assets that can be redeveloped.

Our analysis shows that, within four states, less than 30 per cent of high-amenity areas have more than 5 per cent affordable housing. This demonstrates the potential for delivering much more social housing in areas where tenants would benefit most from the presence of essential amenities. The amenity index, along with analysis identifying locations that could leverage existing social housing assets, should provide policy makers with a platform for delivering strategic social housing development decisions. This approach, as indicated elsewhere in the report, has locational constraint. It can only be achieved in higher value uplift areas and the opportunities for these over coming decades will diminish.

7.6 Developing a strategic approach to new social housing supply

The research shows that a good proportion of social housing stock is located in areas of relatively good to very good amenity, a function of historic stock provision in the inner- and middle-urban areas and with the outer urban ones becoming part of the built-up urban from by virtue of urban growth. Many of these areas are of high value. The research shows that some level of strategic disposal of assets in these higher value areas leads to an increase in social housing in lower amenity, generally lower value locations. As summarised in Section 7.5, some of these high-value areas have considerable capacity for delivering more social housing, capitalising on uplift value, but with a higher density of social housing provision than has often been the case. While this would inevitably mean temporary tenant displacement, most tenants would eventually end up back in their original community.

As more outer-urban and regional locations increase in value, this offers growing opportunities to leverage existing low-density public housing. Additionally, as locations increase in density, opportunities arise to redevelop low- and medium-density social housing into high-density options. These higher density options offer alternative social housing products, including more one- and two-bedroom dwellings, shifting away from low-density, detached dwellings. The redevelopments that occurred in the 1990s in some respects exemplify this, even though they may not have achieved their social policy objectives.

Our analysis shows that it is possible to leverage the sale of public housing assets and increase social housing supply in high and medium-value locations. While this does involve temporary displacement of tenants, it is preferable to the disposal of public housing assets and delivery of social housing in lower value locations.

Given the anticipated growth of social housing in the coming decades, it is clear that most of it cannot occur in existing high-amenity areas. These are predominantly inner-and middle-ring suburbs where the opportunities for public housing redevelopment have been, or soon will be, exhausted – or where such redevelopment is simply not possible within the parameters of current social housing funding models.

Therefore, we need to develop new funding models and planning practices that can provide more social housing in high-amenity areas. These could include:

- The Housing Australian Future Fund (or its state equivalent) offering a full- or part-capital funding program (no requirement for public private partnerships) for a designated range of high-amenity access developments for which other funding is not otherwise available.
- New ways of generating a greater income per dwelling unit, such as differential rent structures (e.g. 30% household rent for high-amenity sites or designating certain developments or properties for applicants on higher incomes). Were this to be adopted, social housing authorities would be assured that their net rents per household would grow in real terms because the developments would not be rigidly targeted to the very lowest incomes.
- Inclusionary zoning – that is, ensuring that reforms focusing on greater urban consolidation and, particularly, public transport activity centres include provision for social housing.

However, even these initiatives will not be enough. There is a need to provide more social housing in low amenity areas and to deliver appropriate amenities required to support social housing tenants. These could include:

- A push by governments to provide more appropriate infrastructure in such regions, particularly the growth areas. This would likely require a national infrastructure program with funding to cover the key human services that are required for liveability.
- Governments to take a more active role in land acquisition and development in such areas akin to the role of housing commissions in earlier times.
- The development of a location-specific allocation policy that gives preference to waitlist applicants who are not in need of high-amenity services, including those in low-income employment in outer areas (e.g. key workers).
- All jurisdictions to have a model for forecasting future housing demand that integrates several data sources, including from housing registers, rental bond data, ABS data and amenity data, such as developed in this report. Such a model would identify which local government areas are a priority for future social housing sites and their capacity to provide appropriate amenities. Desirably, the model – or perhaps a separate model – would assess the capacity for all existing public housing sites to provide maximised social housing provision under different funding models.

7.7 Final remarks

This report presents a number of useful insights and options for policy makers. Beyond developing an amenity index that can be used in strategic planning decisions when assessing suitable locations for market and social housing supply, our research shows:

- how social housing is not evenly distributed, with many high-amenity locations containing very little social housing and many low-amenity locations having a significant supply.
- that some state and territory governments have been disposing of social housing in high-amenity locations and delivering new social housing in low-amenity locations, a practice that is not necessarily best for the wellbeing of tenants.
- how it is possible to leverage existing public housing assets in high and medium-value areas to deliver an increase in social housing within the same location as an alternative to selling in high-value areas and developing in low-value areas.

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AIHW – see Australian Institute of Health and Welfare

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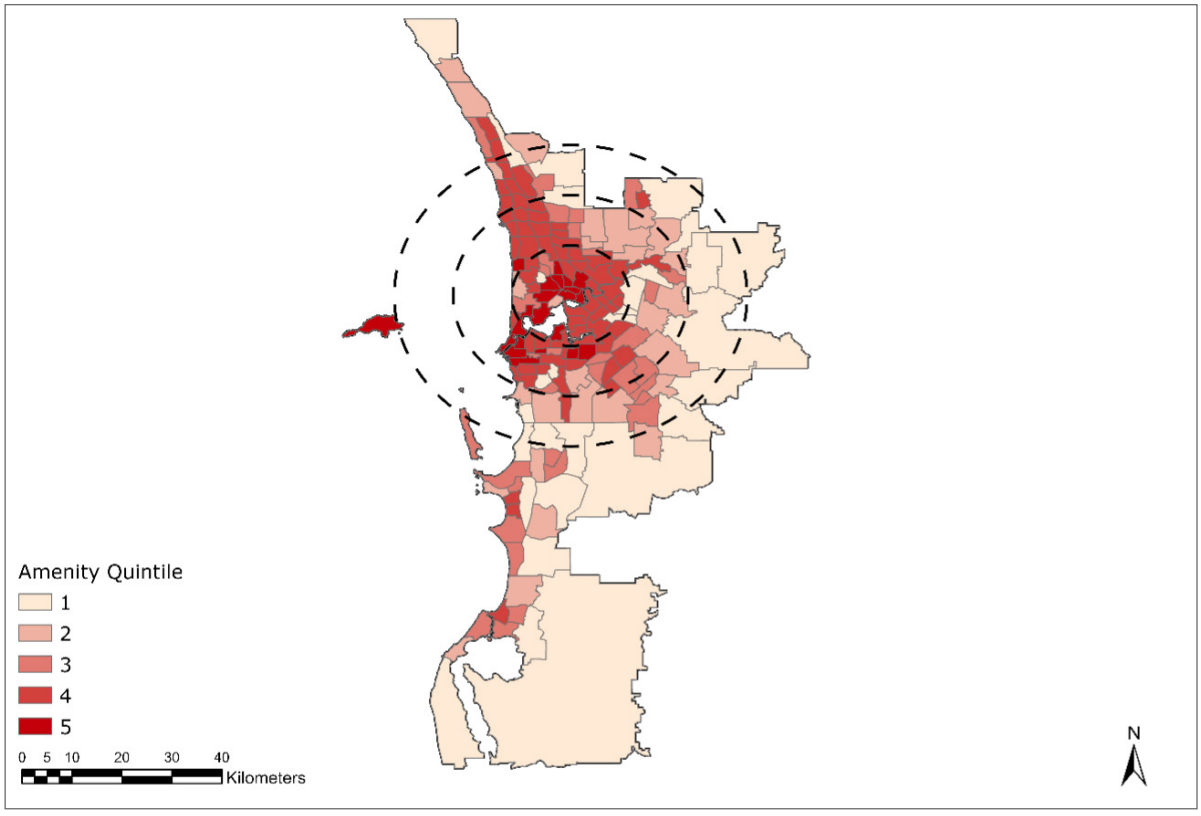
Appendix 1: Additional amenity and house price maps

Appendix 1 contains the full set of amenity maps discussed in Chapter 4 that established the comprehensive amenity index used to assess access to services across Australia's major urban areas. While Chapter 4 focused on analysing maps for Melbourne, Sydney and Brisbane to illustrate key patterns in the relationship between amenities and social housing, this appendix provides a complete set of maps for all capital cities and major regional centres. These additional maps allow for comparison across different urban contexts, helping to validate the national applicability of the amenity index methodology. Each map uses consistent quintile classifications relative to the local urban area, enabling meaningful cross-regional analysis while respecting the distinct service provision characteristics of different cities and towns.

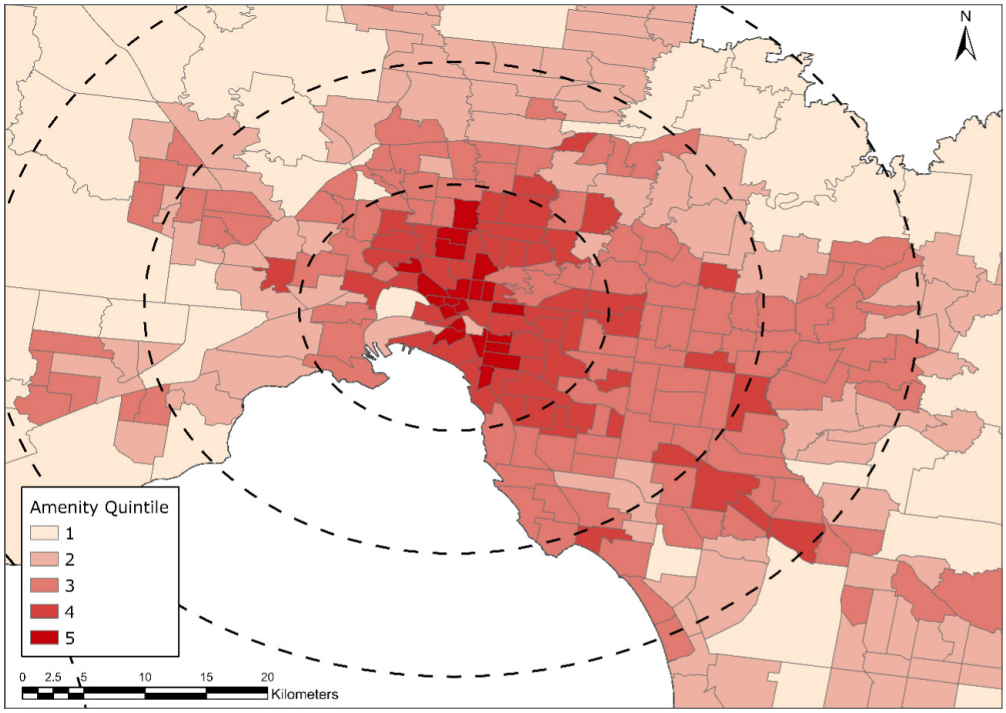
Additional amenity quintile maps

Figure A1: Amenity quintiles in Perth



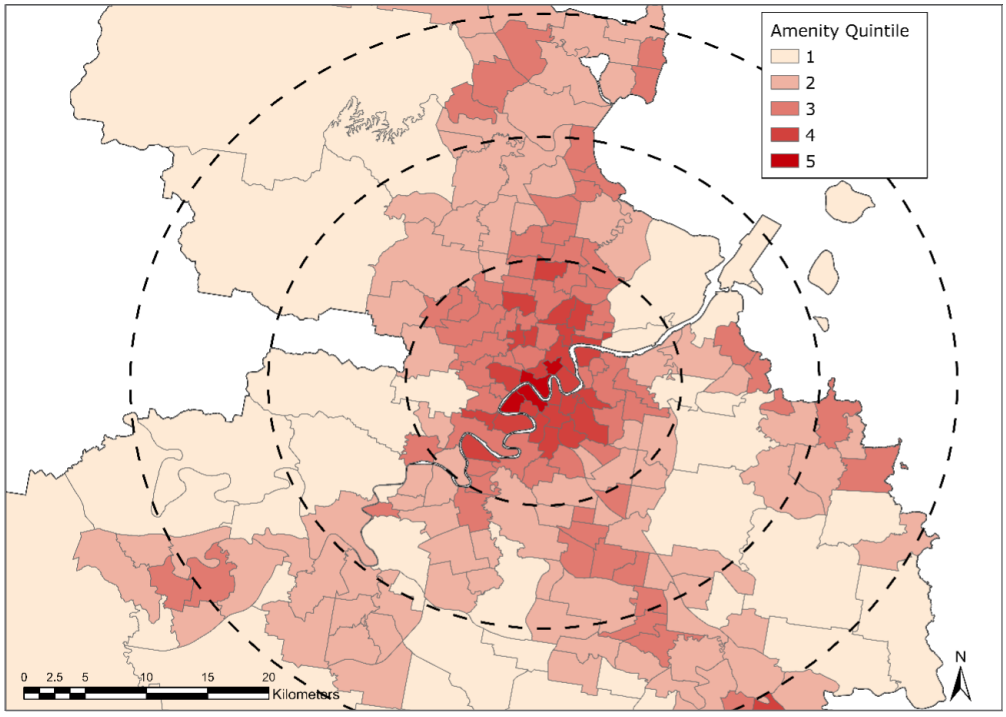
Source: OSM (2022) and authors' calculations.

Figure A2: Amenity quintiles in Melbourne



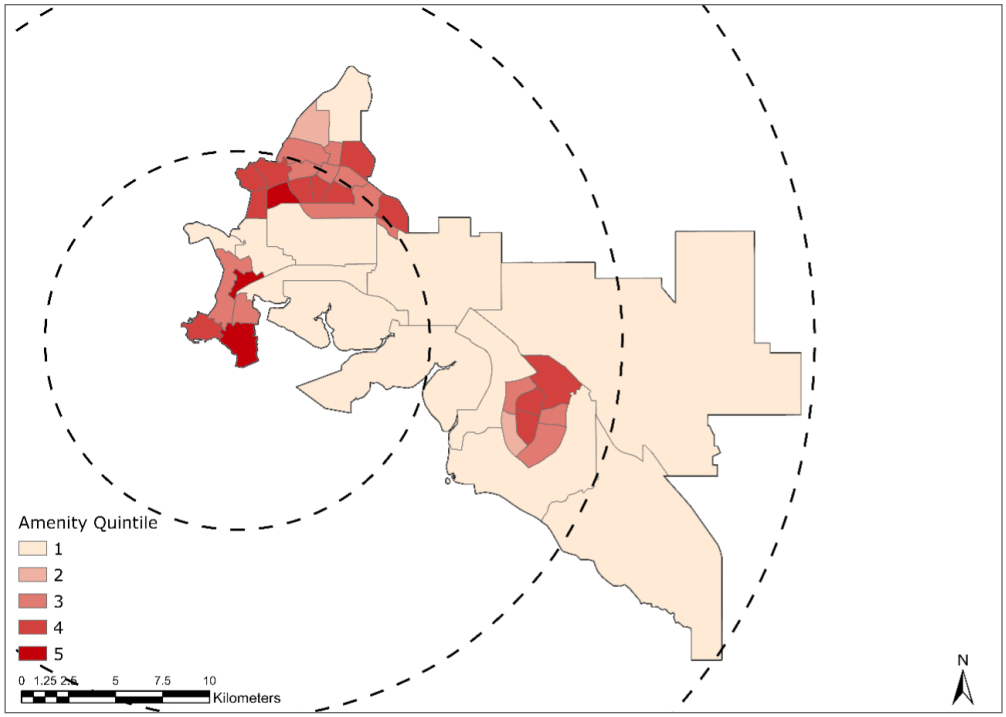
Source: OSM (2022) and authors' calculations.

Figure A3: Amenity quintiles in Brisbane



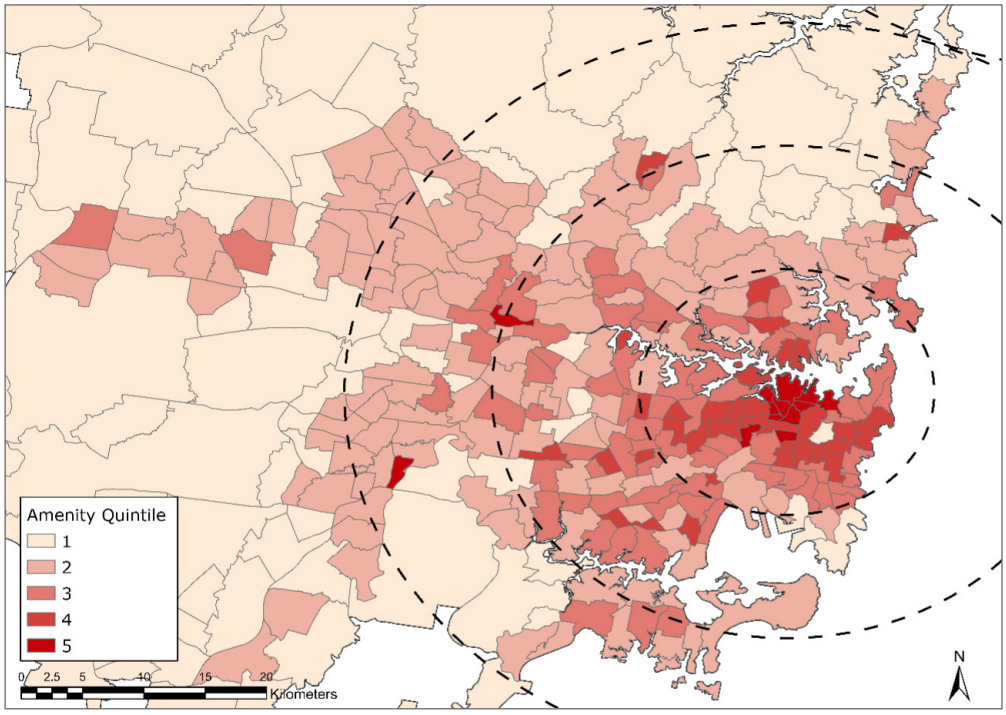
Source: OSM (2022) and authors' calculations.

Figure A4: Amenity quintiles in Darwin



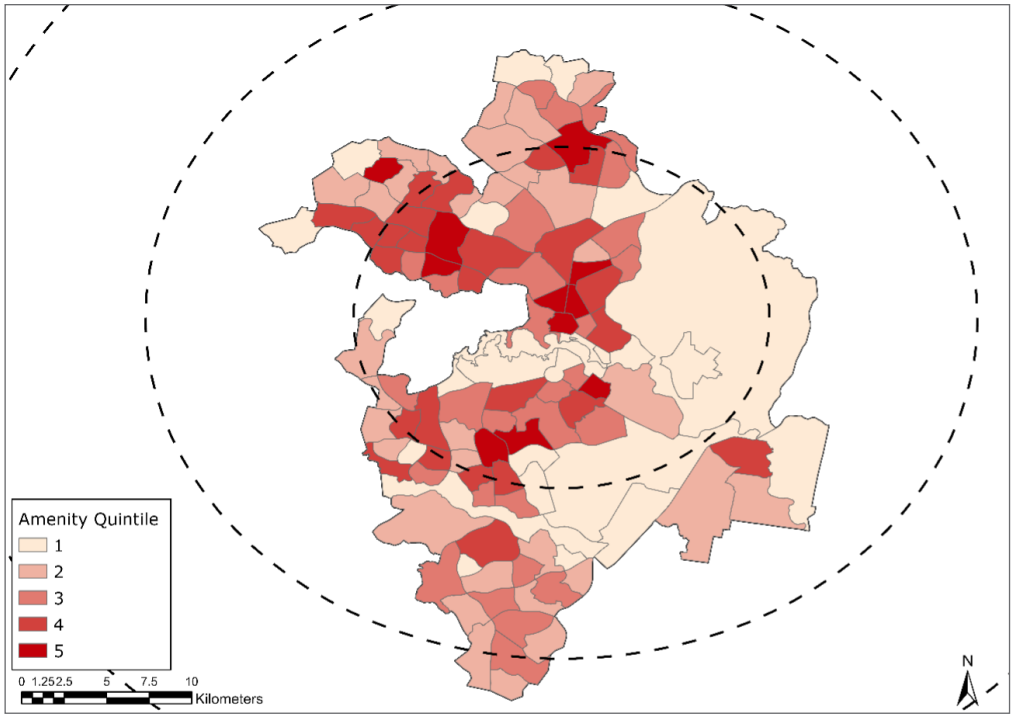
Source: OSM (2022) and authors' calculations.

Figure A5: Amenity quintiles in Sydney



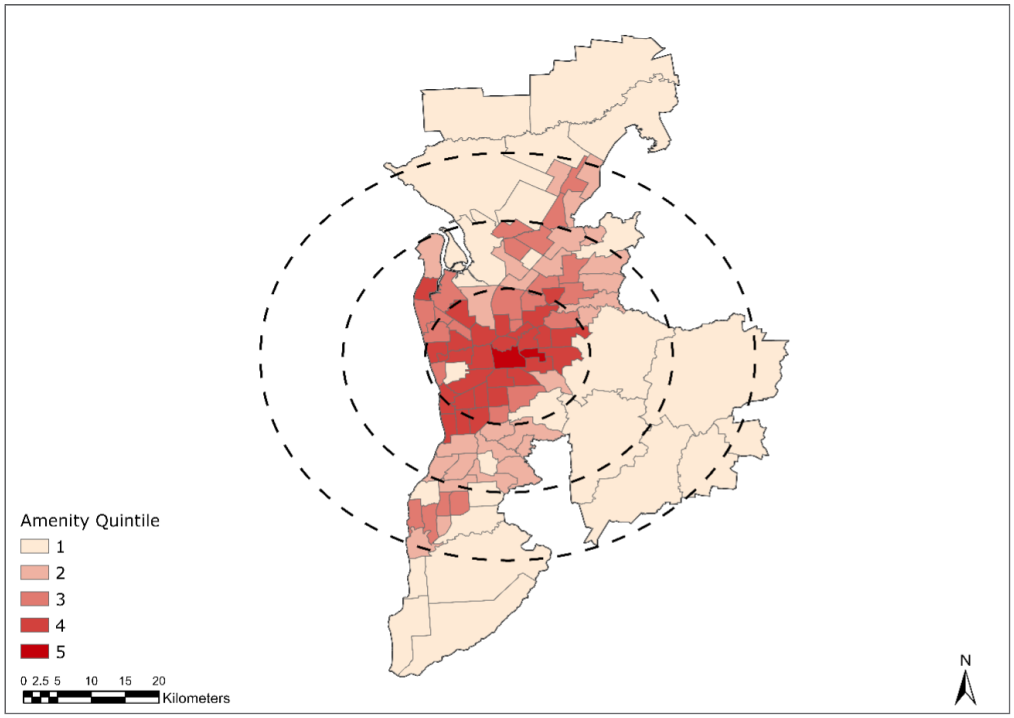
Source: OSM (2022) and authors' calculations.

Figure A6: Amenity quintiles in Canberra



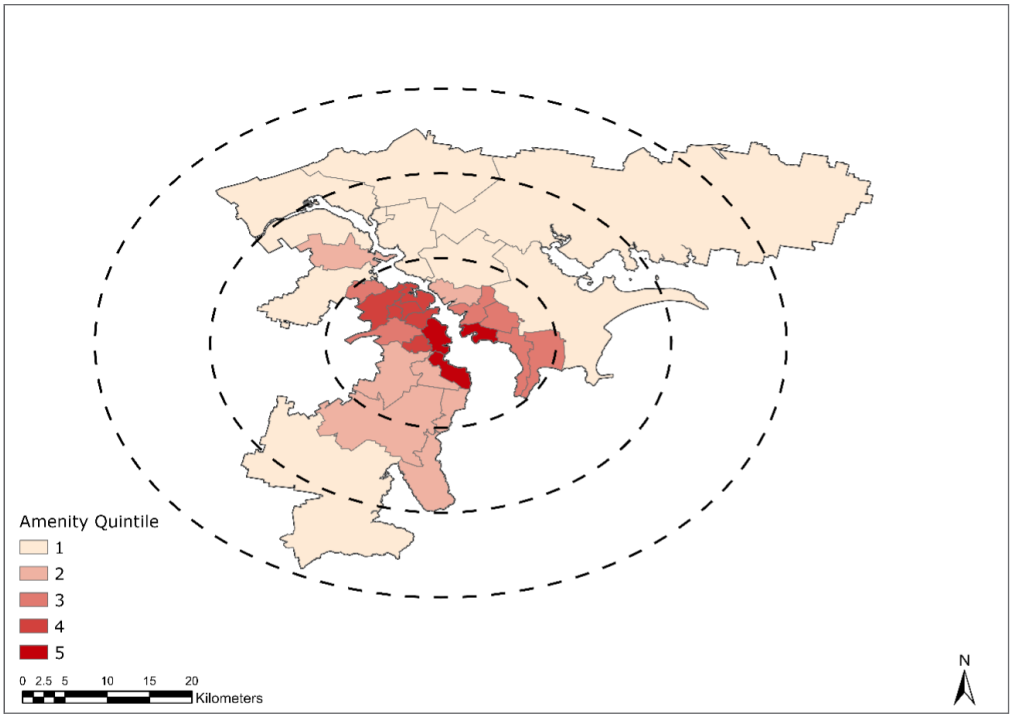
Source: OSM (2022) and authors' calculations.

Figure A7: Amenity quintiles in Adelaide



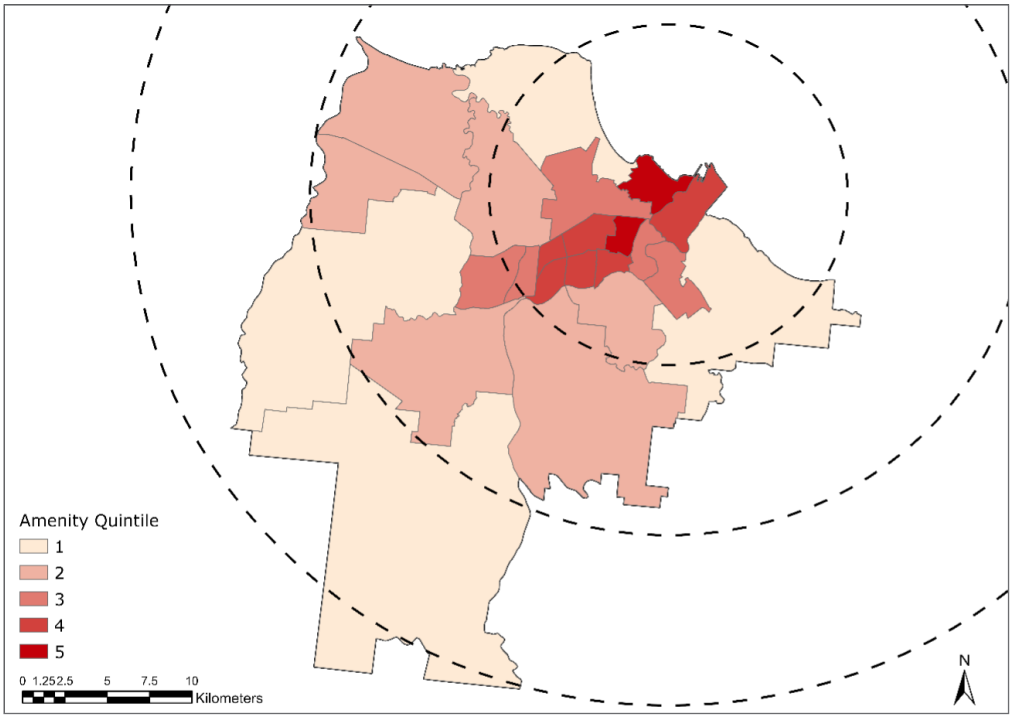
Source: OSM (2022) and authors' calculations.

Figure A8: Amenity quintiles in Hobart



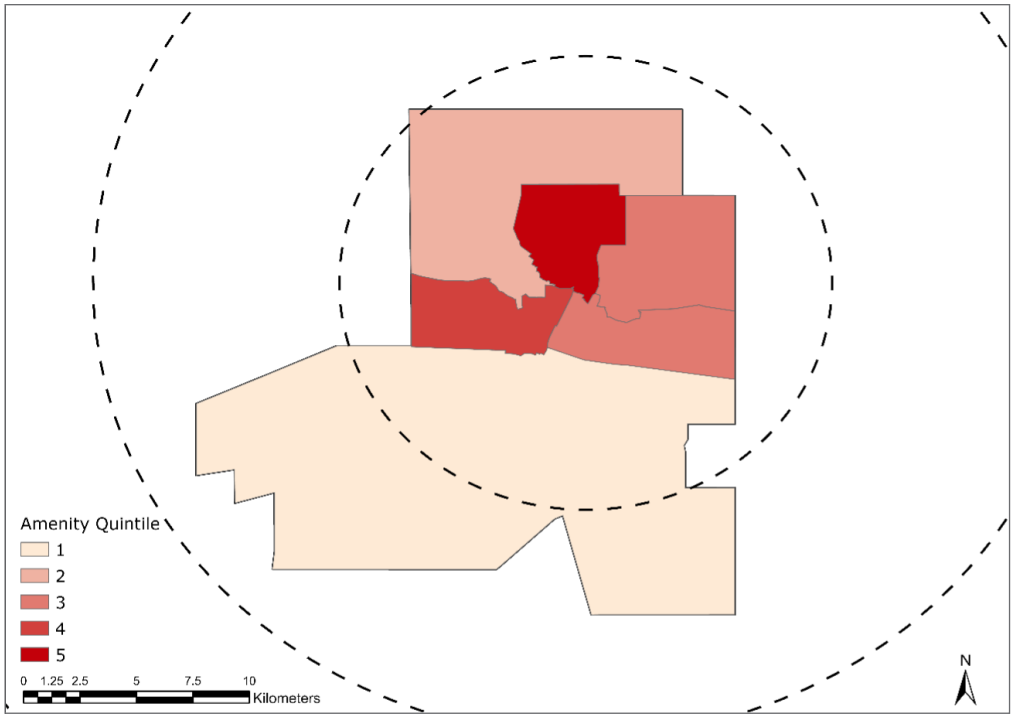
Source: OSM (2022) and authors' calculations.

Figure A9: Amenity quintiles in Townsville



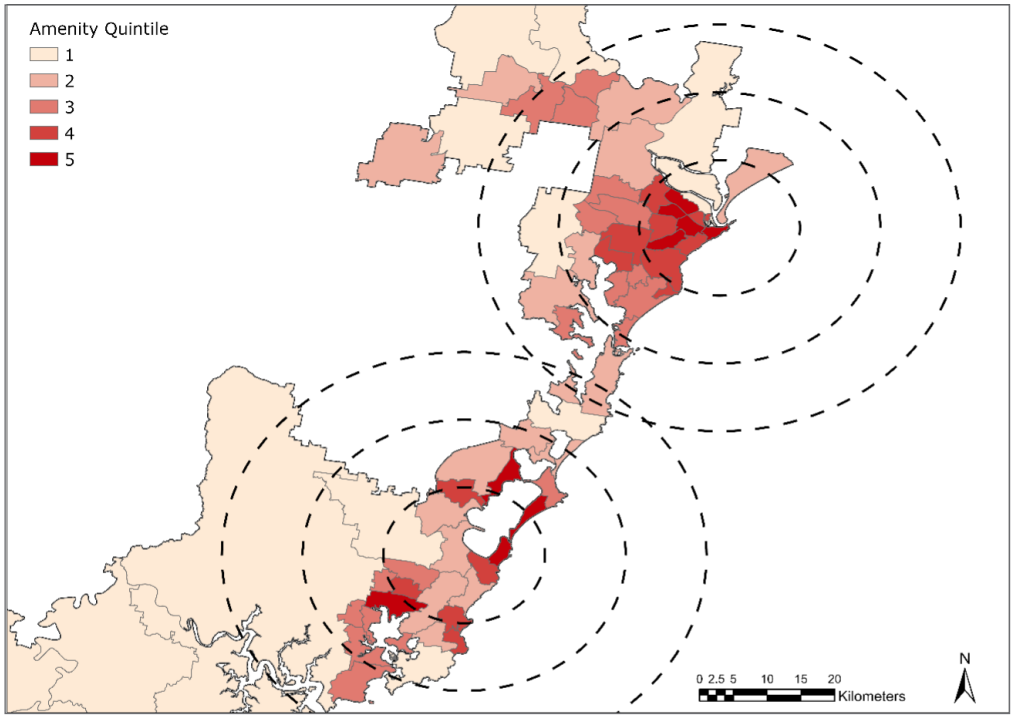
Source: OSM (2022) and authors' calculations.

Figure A10: Amenity quintiles in Alice Springs



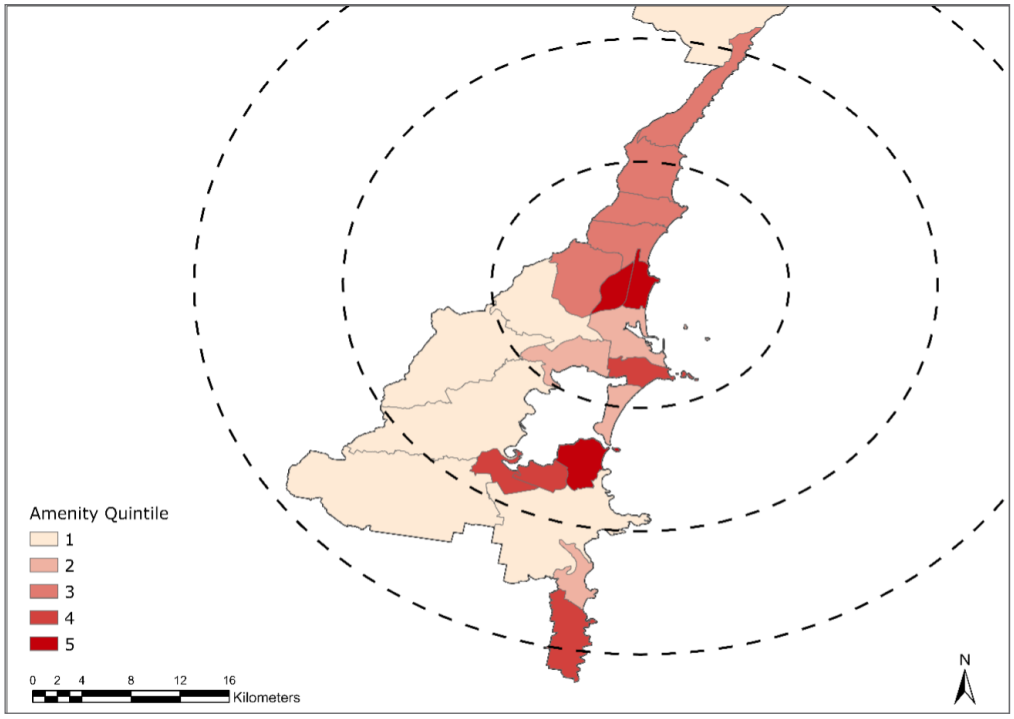
Source: OSM (2022) and authors' calculations.

Figure A11: Amenity quintiles in Newcastle



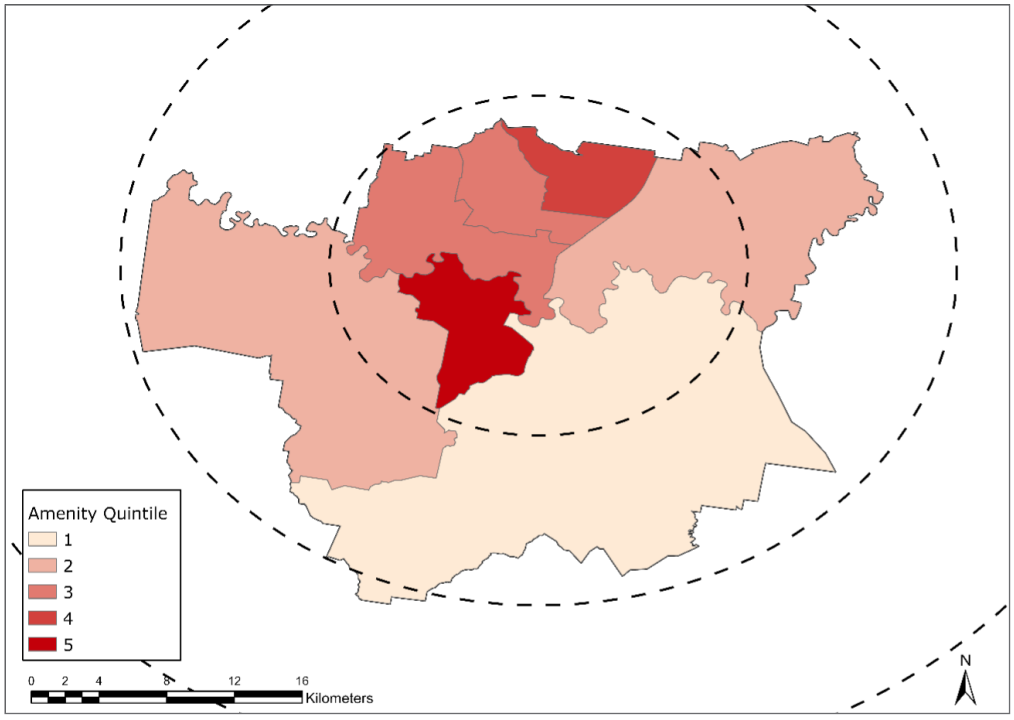
Source: OSM (2022) and authors' calculations.

Figure A12: Amenity quintiles in Wollongong



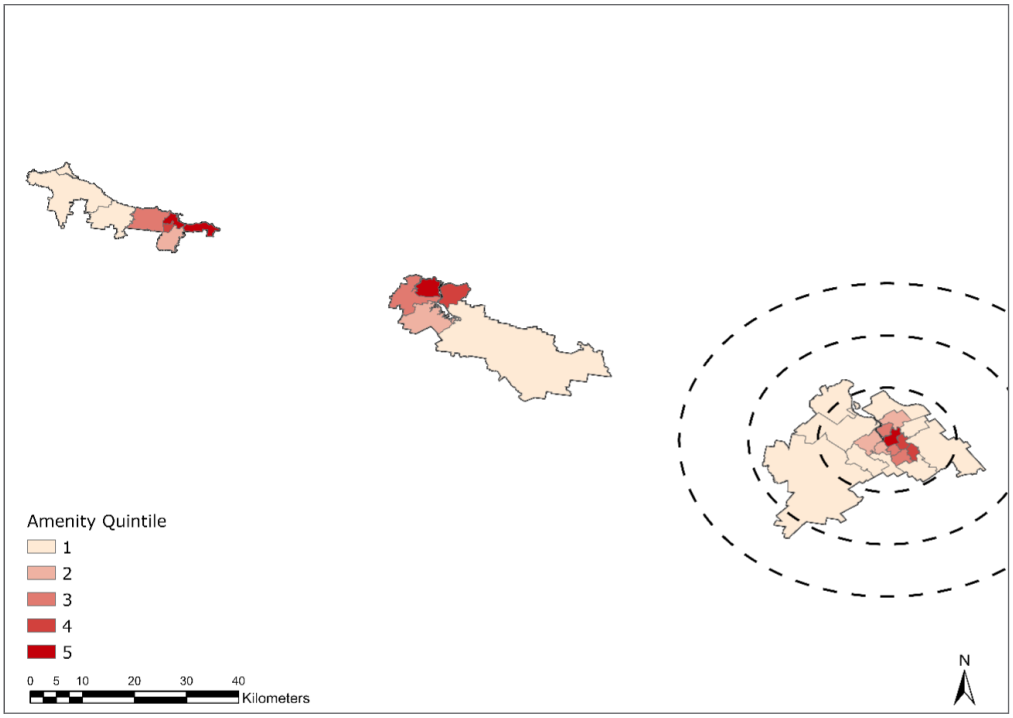
Source: OSM (2022) and authors' calculations.

Figure A13: Amenity quintiles in Albury–Wodonga



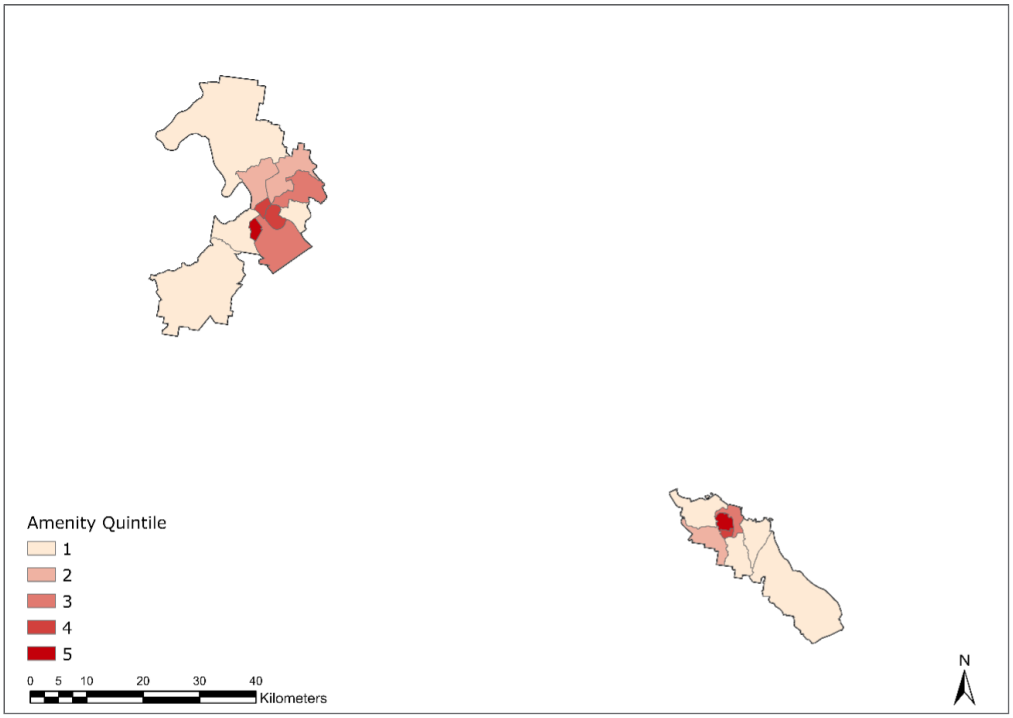
Source: OSM (2022) and authors' calculations.

Figure A14: Amenity quintiles in north Tasmania rural centres



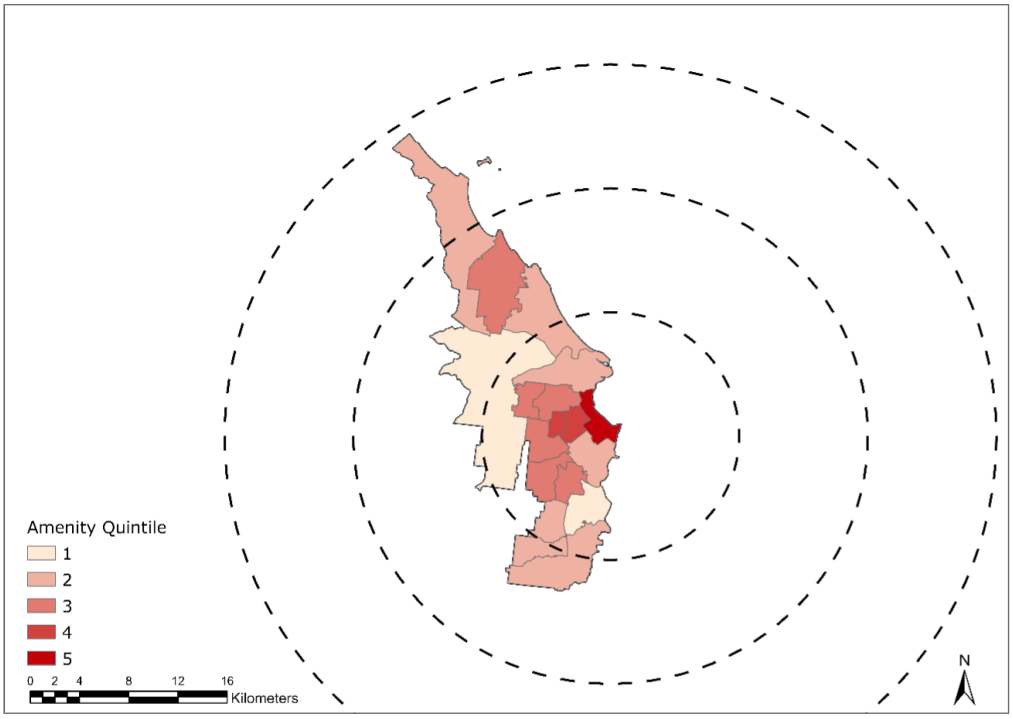
Source: OSM (2022) and authors' calculations.

Figure A15: Amenity quintiles in Gladstone and Rockhampton



Source: OSM (2022) and authors' calculations.

Figure A16: Amenity quintiles in Cairns



Source: OSM (2022) and authors' calculations.

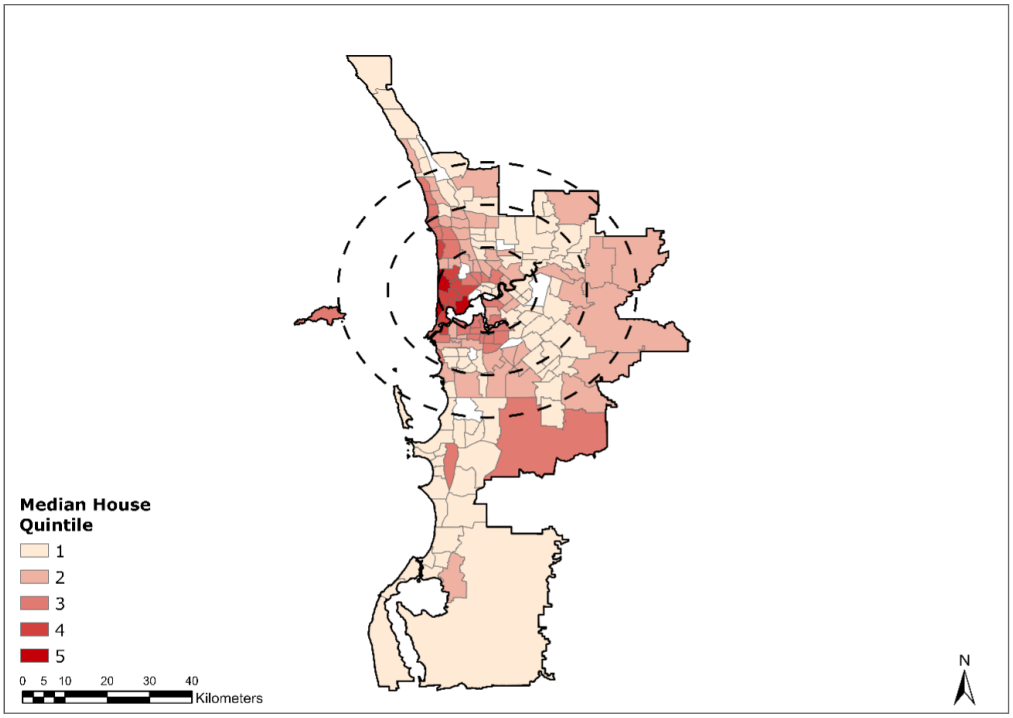
Additional median house price maps

We showcase some additional maps of median house prices across the remaining capital city SUAs as well as those within surrounding areas. For brevity, we exclude second-tier and other regional cities.

The median house quintile map for Perth reveals a clear spatial diffusion, with the highest quintiles (4–5) concentrated in the western suburbs along the Swan River and coastal areas, particularly around Cottesloe and surrounding suburbs. The inner city also demonstrates relatively high values (3–4). Lower quintiles (1–2) are generally found in the outer-metropolitan regions, particularly in the south-east corridor and northern growth areas.

Comparing the housing and amenity patterns shows a particularly strong correlation in Perth's western suburbs and along the coast, where both house prices and amenity scores reach their highest quintiles (4–5). The amenity map shows a more concentrated pattern of high scores in the inner city and along transport corridors than the house price pattern would suggest. The eastern regions consistently show lower values across both metrics, though housing values tend to be slightly higher than amenity scores in these areas. This suggests that while amenity and house prices are closely related in Perth's established western suburbs, other factors influence property values in the outer-metropolitan regions.

Figure A17: Median house price quintiles in Perth SUA

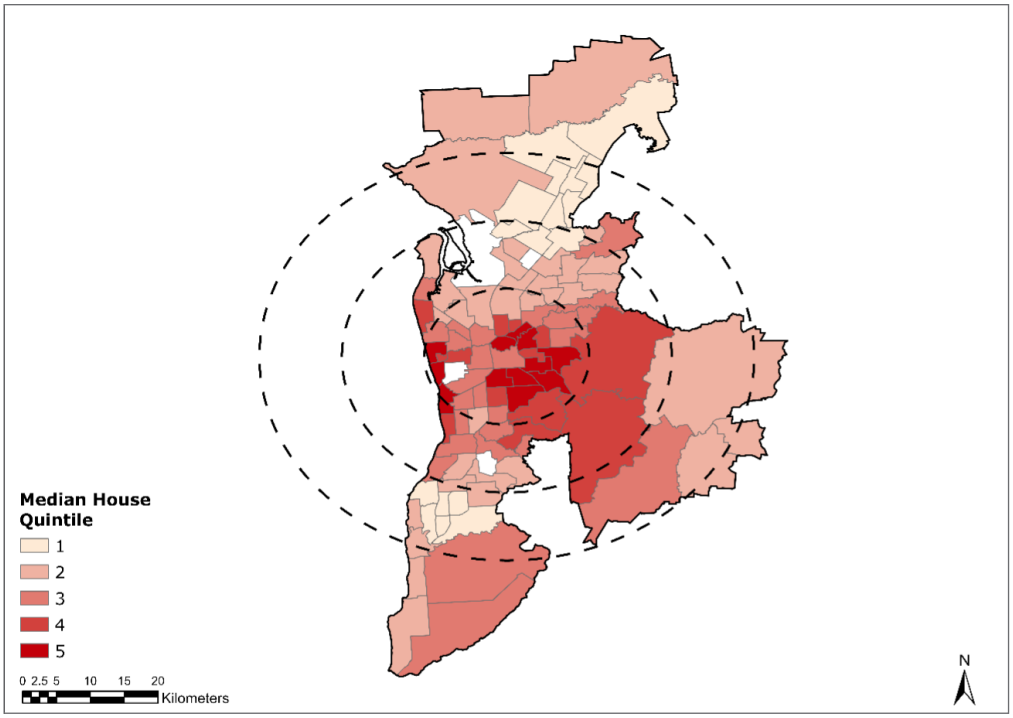


Source: APM (2024) and authors' calculations.

The median house quintile pattern across Adelaide shows the highest values (4–5) concentrated in the eastern suburbs and inner south, particularly through established areas like Burnside and Unley. There is also a notable pocket of high values in the coastal suburb of Glenelg. The lower quintiles (1–2) are predominantly found in the northern suburbs and outer-southern regions. The middle quintiles (2–3) form a transitional band between these areas, particularly evident in the middle-ring suburbs.

When comparing housing and amenity patterns, there is a strong correlation in the inner city and eastern suburbs, where both metrics show high values. However, the amenity map shows a more concentrated pattern of high scores in the CBD and immediate surrounds, while housing values remain high further into the eastern suburbs despite decreasing amenity scores. The coastal areas show an interesting pattern where house prices are generally higher than their amenity scores would suggest, particularly around Glenelg. The outer-eastern regions maintain relatively high house prices despite lower amenity scores, suggesting factors beyond amenity access influence property values in these areas.

Figure A18: Median house price quintiles in Adelaide SUA

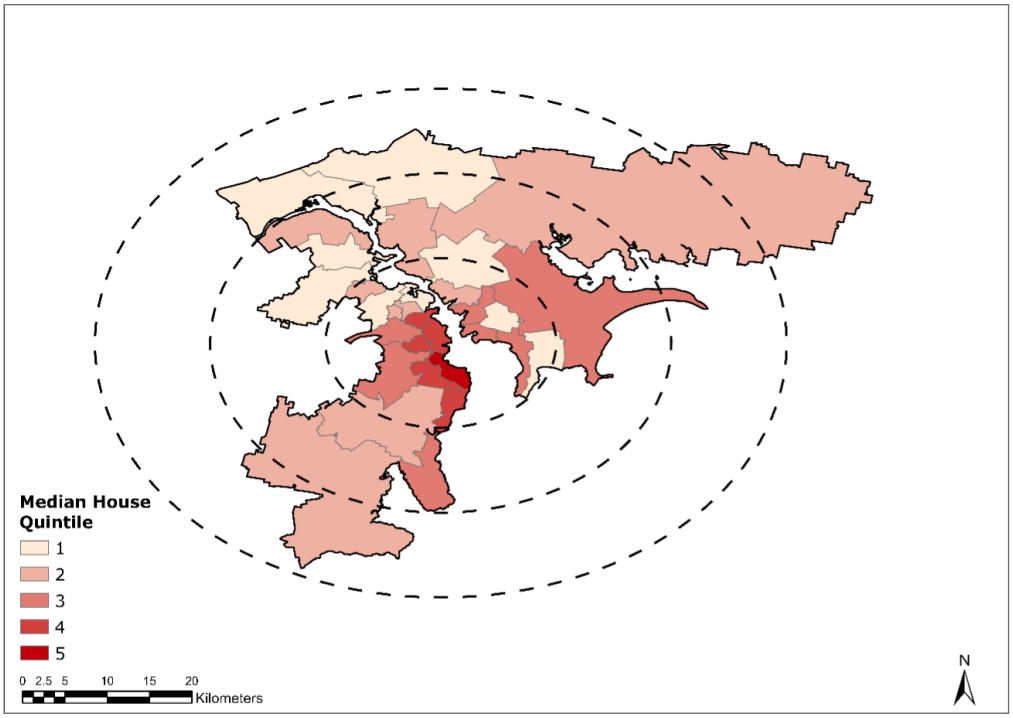


Source: APM (2024) and authors' calculations.

As in the previous figures, the median house quintile map for Hobart (Figure A19) shows the highest quintiles (4–5) concentrated in inner-suburban areas, particularly in Sandy Bay and surrounds. There is also a notable pocket of higher values across the Derwent River in the eastern shore area. Lower quintiles (1–2) are generally found in the northern suburbs and outer regions of the metropolitan area, while middle quintiles (2–3) form a transitional band between these areas, particularly evident in the middle-ring suburbs.

Comparing housing and amenity patterns shows a strong correlation in the inner city and immediate surrounds, where both housing values and amenity scores reach their peak quintiles. However, the amenity map shows a more concentrated pattern of high scores in the CBD and inner suburbs than the house price pattern, which extends further into the suburban areas. The eastern shore shows an interesting divergence where house prices in some areas are higher than their amenity scores would suggest. The outer regions consistently show lower values across both metrics, though housing values tend to be slightly higher than amenity scores in these areas, indicating the influence of other factors on property values.

Figure A19: Median house price quintiles in Hobart SUA

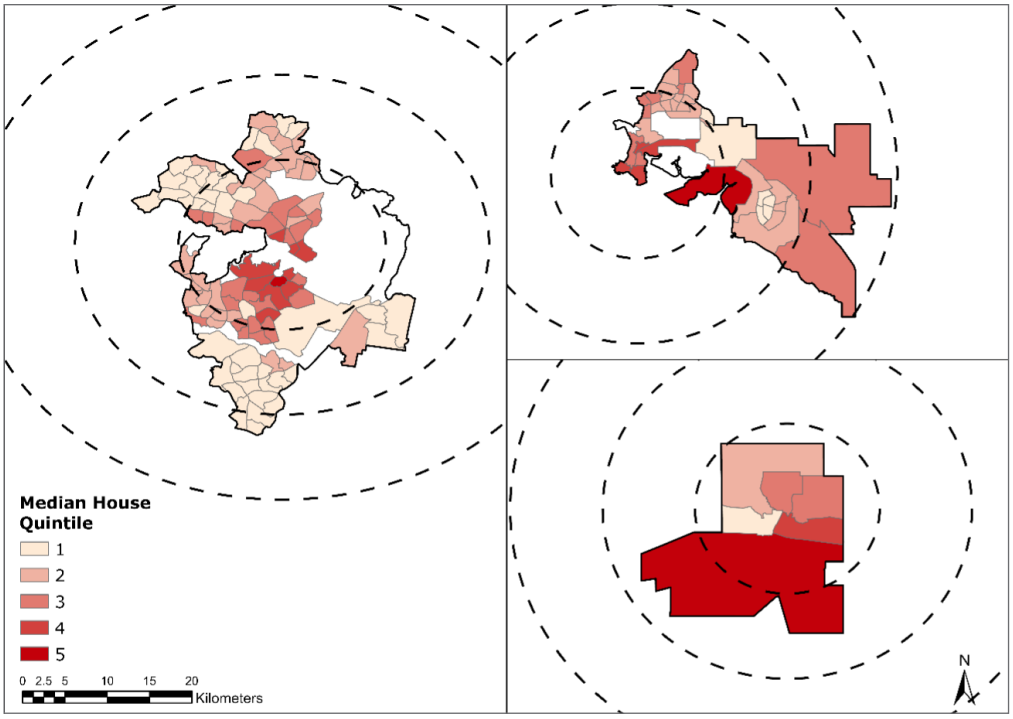


Source: APM (2024) and authors' calculations.

The median house quintile patterns within Figure A20, which shows three regional centres, Canberra, Darwin and Alice Springs, show unique characteristics. In Canberra (left), the highest quintiles (4–5) are concentrated in the inner north and inner south, particularly around the Parliamentary Triangle and established suburbs like Forrest and Red Hill. Lower quintiles (1–2) are generally found in the outer suburbs, with a clear gradient from centre to periphery. Darwin (top right) displays high values along its coastal areas and around the harbour, with a notable hotspot in areas like Larrakeyah and Fannie Bay. The CBD and northern suburbs show mixed values. Alice Springs (bottom right) shows a striking contrast, with its highest quintiles in the eastern suburbs and lower values in the town centre and outer areas.

Comparing housing and amenity patterns reveals interesting variations across the three cities. Canberra shows the strongest correlation between high-amenity scores and high house prices in its inner areas, particularly around civic and the inner north where both metrics reach their peak quintiles. However, some affluent areas maintain high house prices despite moderate-amenity scores. Darwin's amenity pattern is more concentrated around its CBD and waterfront areas, while housing values show a broader spatial distribution of high values. Alice Springs shows a notable disconnect between amenity and house prices, with high housing values in areas that do not necessarily correspond to high-amenity scores, suggesting other factors, such as views, lot size or socio-economics, may be more influential in determining property values in this regional context.

Figure A20: Median house price quintiles in Canberra, Darwin and Alice Springs SUAs



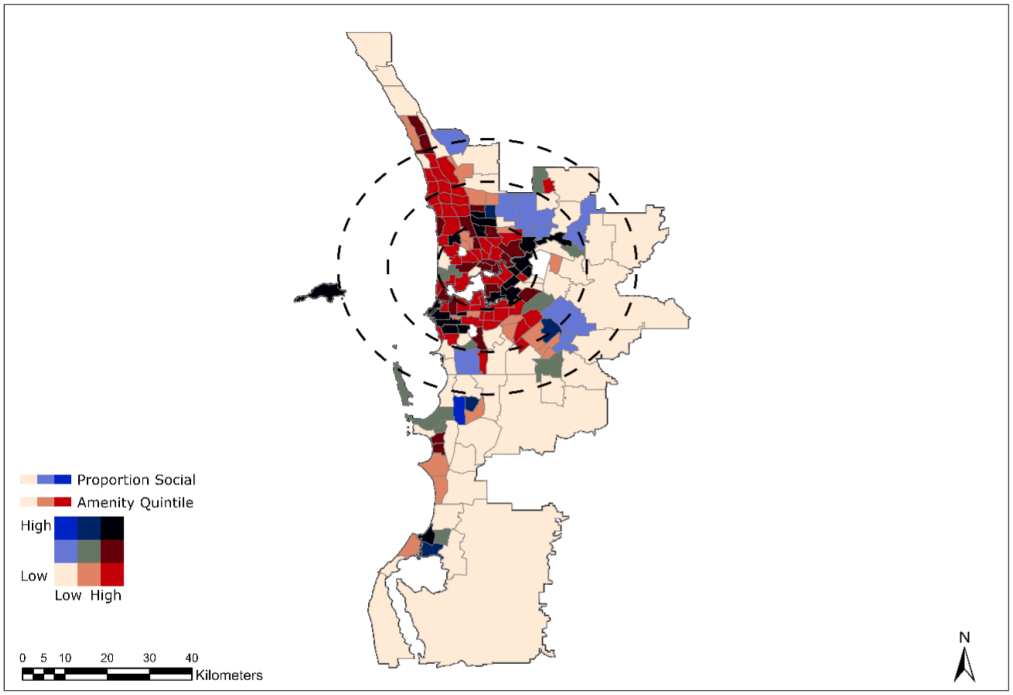
Source: APM (2024) and authors' calculations.

Appendix 2: Social housing and amenity maps

Below are additional maps examining the spatial relationship between social housing proportions and amenity levels across Australia's major cities at the SA2 level for the remaining set of capital cities that were not discussed within Chapter 5. Through a series of bivariate choropleth maps, we analyse how the distribution of social housing aligns with access to the amenities index.

Figure A21 shows the bivariate relationship between social housing proportions and amenity levels across SA2s for Perth. In Perth's inner suburbs, particularly east of the CBD, social housing clusters generally align with moderate- to high-amenity levels, shown by the darker shading as those around Nollamara, Victoria Park, Belmont and Fremantle. Interestingly, the CBD itself has a moderate proportion of social housing, leaving it relatively distinct among the capital cities. The coastal regions in the north, while showing high-amenity levels (red), generally have lower proportions of social housing, except for a few notable SA2s in the southern coastal areas where social housing coincides with moderate-amenity levels. The outer-suburban areas with higher proportions of social housing typically show lower amenity levels.

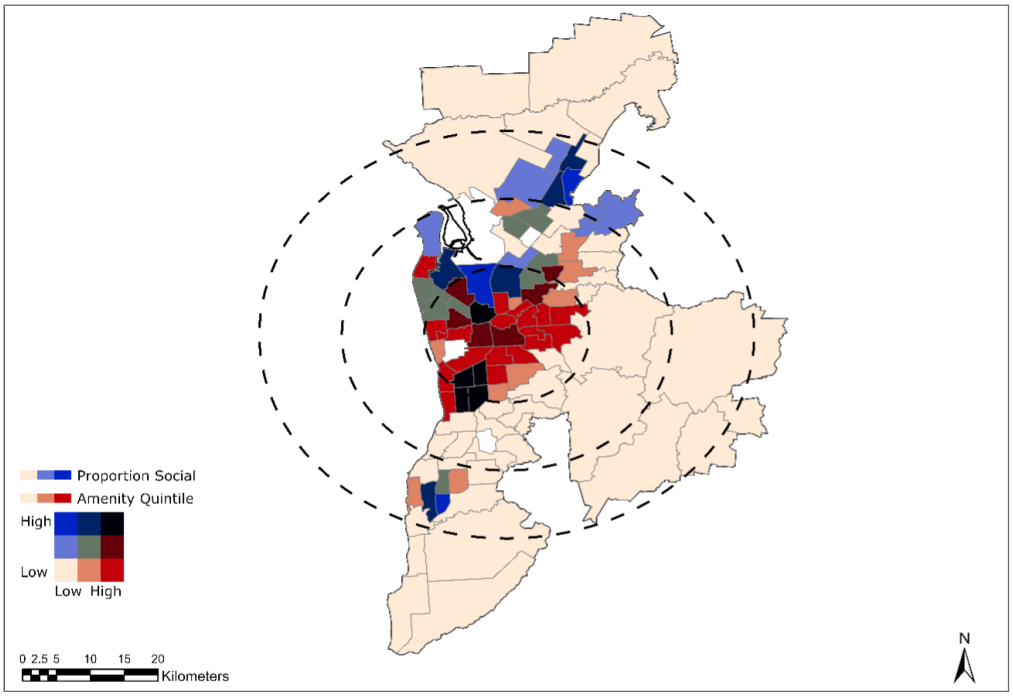
Figure A21: Distribution of social housing and amenities across Perth SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The relationship between the proportion of social housing and amenity levels across SA2s for Adelaide is found in Figure A22. In Adelaide's inner-northern suburbs, there are significant clusters of social housing that coincide with moderate- to high-amenity levels, particularly evident in the darker shaded areas. The northern suburbs also show several distinct concentrations of social housing extending towards the outer-metropolitan area, where amenity levels tend to be lower. While the inner city and coastal areas display high-amenity levels (red), they generally have lower proportions of social housing, with the exception of a few SA2s in the western coastal region around Park Holme, where higher proportions of social housing align with moderate-amenity levels. A notable cluster of social housing appears in the southern suburbs, though these areas show variable amenity levels.

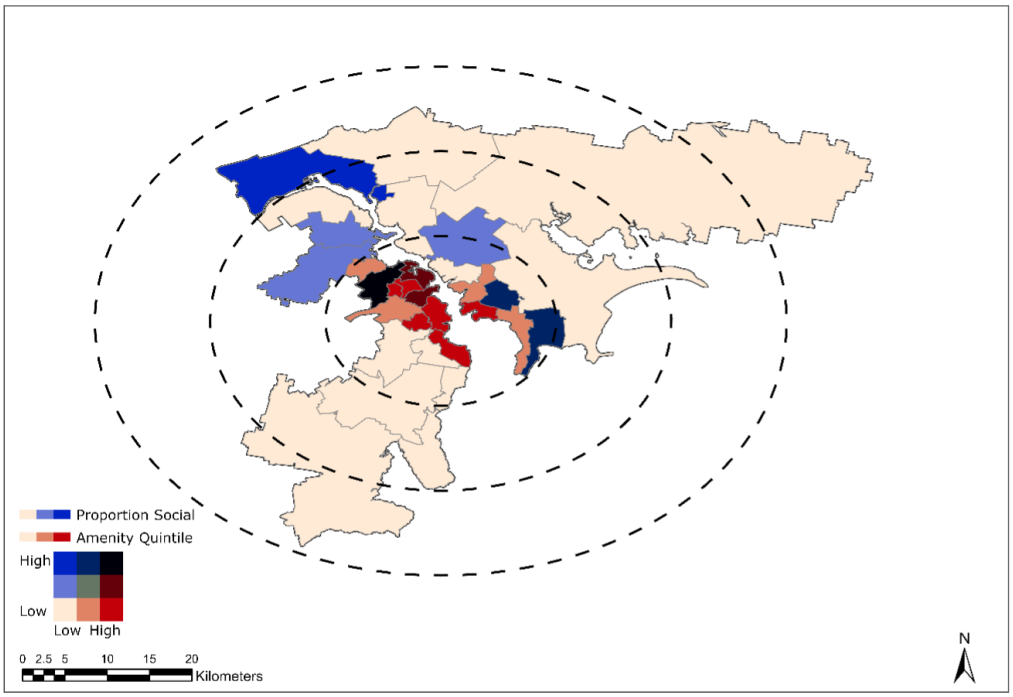
Figure A22: Distribution of social housing and amenities across Adelaide SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The bivariate relationship between the proportion of social housing and amenity levels across SA2s for Hobart found in Figure A23 focuses on areas of concentrated social housing (shown in blue). The northern suburbs show significant clusters of social housing, particularly in Glenorchy and surrounds, where amenity levels are generally moderate. The inner city displays high-amenity levels (red) with some areas showing a mix of high amenity and high proportion of social housing, evident in the darker shaded areas. The eastern shore has several distinct SA2s with high proportions of social housing, notably around Rokeby and Clarendon Vale, though these areas generally align with lower amenity levels. The western and southern suburban fringes show minimal social housing presence and generally lower amenity levels, as indicated by the lighter beige shading.

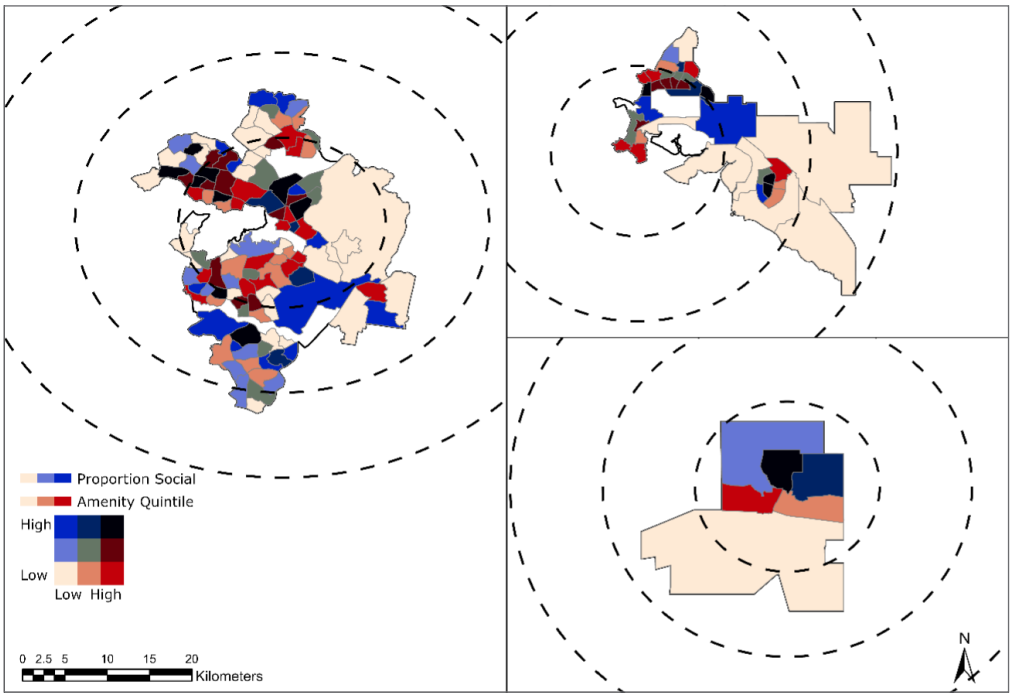
Figure A23: Distribution of social housing and amenities across Hobart SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The bivariate relationship between social housing proportions and amenity levels found in Figure A24 across SA2s for Canberra, Darwin and Alice Springs (shown in three separate panels) focuses on areas of concentrated social housing (shown in blue). In Canberra (left panel), social housing clusters appear throughout both inner and outer areas, with many SA2s showing a complex mix of high social housing and high-amenity levels (darker shades), particularly in the inner north and inner south. Darwin (top right panel) shows several distinct areas of high social housing proportion in its northern suburbs, with variable amenity levels, while the waterfront areas display high amenity but lower social housing proportions. In Alice Springs (bottom right panel), social housing is concentrated in the northern SA2s, where it aligns with mixed amenity levels, while the southern portions show minimal social housing presence and generally lower amenity levels.

Figure A24: Distribution of social housing and amenities across Canberra, Darwin and Alice Springs SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

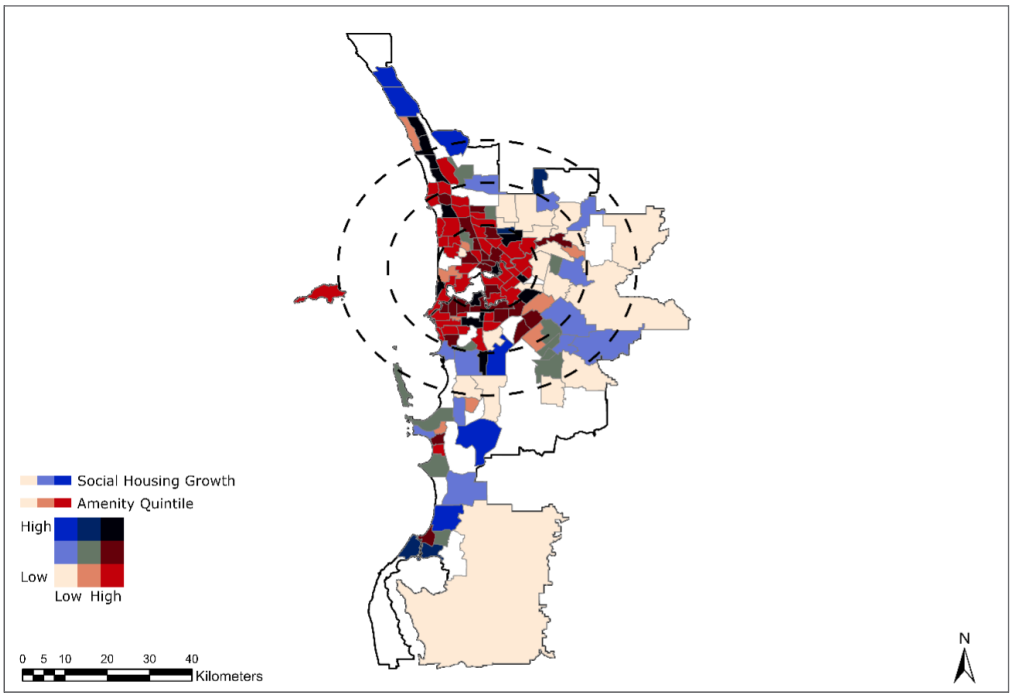
Across Australia's major cities, the relationship between social housing proportions and amenity levels shows several consistent patterns:

- Inner-city areas generally demonstrate high-amenity levels, with variable proportions of social housing — for example, some inner areas successfully combine high amenity with significant social housing presence, particularly in Melbourne, Sydney and Canberra.
- The middle-ring suburbs of most cities contain distinct clusters of social housing, though these areas show considerable variation in amenity levels. This is particularly evident in cities like Perth, Adelaide and Brisbane, where social housing in middle-ring areas often coincides with moderate- to low-amenity levels.
- Coastal areas, while typically high in amenity, generally show lower proportions of social housing, with notable exceptions in areas of the Gold Coast and western Perth.
- The outer-suburban regions of most cities consistently display lower values for both variables, though some outer areas maintain high social housing proportions despite lower amenity levels, particularly evident in western Sydney and northern Adelaide.

Social housing growth and amenity levels – additional data

Figure A25 presents a bivariate choropleth map examining the relationship between social housing growth in the period 2006–21 and amenity levels across the SA2s within the Perth SUA. The spatial patterns mirror those observed in both Melbourne and Sydney, with high-amenity areas in the CBD and inner suburbs showing polarised outcomes – either significant social housing growth (black shading) or decline (bright red). Nevertheless, Perth is unique in that it invested in substantial social housing within the CBD over the period. Likewise, the remaining middle and outer suburbs experienced a mixture of positive and negative growth in social housing, but with no clear correlation with the level of amenity. However, there is a stretch of development to the west of the Mitchell Freeway in the northern suburbs that correlates with areas of high amenity. As the base level of social housing in 2006 in the outer suburbs was generally low, the extreme difference should not be particularly striking.

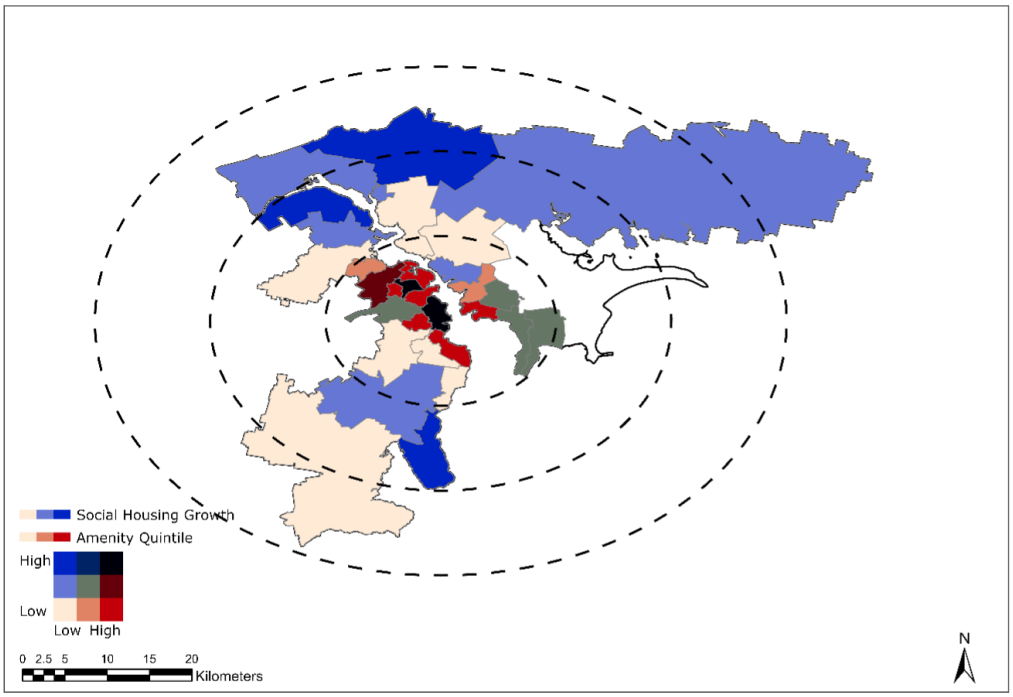
Figure A25: Distribution of social housing growth and amenities across Perth SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Figure A26 presents a bivariate choropleth map examining the relationship between social housing growth (2006–21) and amenity levels across Hobart's SA2s. The CBD and inner-western suburbs along the Derwent River display varied patterns of social housing change, similar to other capital cities, with both growth and decline evident in these high-amenity areas. Outer-suburban regions, characterised by lower amenity levels, demonstrate an inconsistent pattern of social housing change, with no clear relationship between amenity access and stock changes.

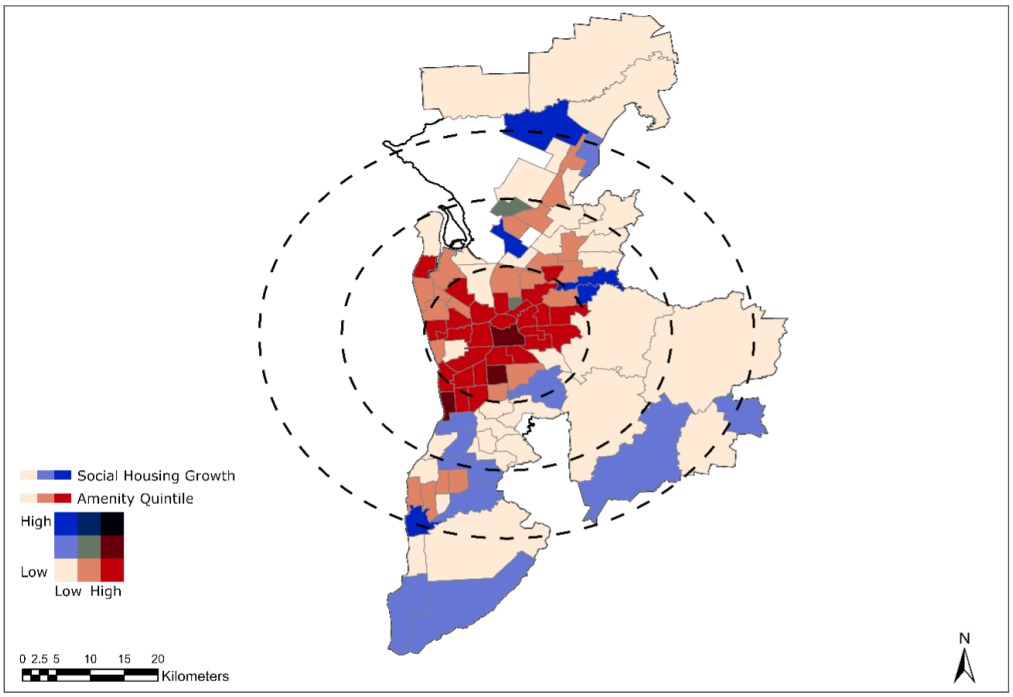
Figure A26: Distribution of social housing growth and amenities across Hobart SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

The spatial relationship between social housing growth (2006–21) and amenity levels across Adelaide's SA2s is depicted in Figure A27. The pattern differs from other capital cities, with the CBD and inner-suburban areas predominantly experiencing social housing decline, with some notable exceptions in the Adelaide CBD and Brighton SA2s. Outer-suburban regions, characterised by lower amenity levels, demonstrate the highest social housing growth rates, suggesting a spatial shift in social housing provision towards less serviced areas.

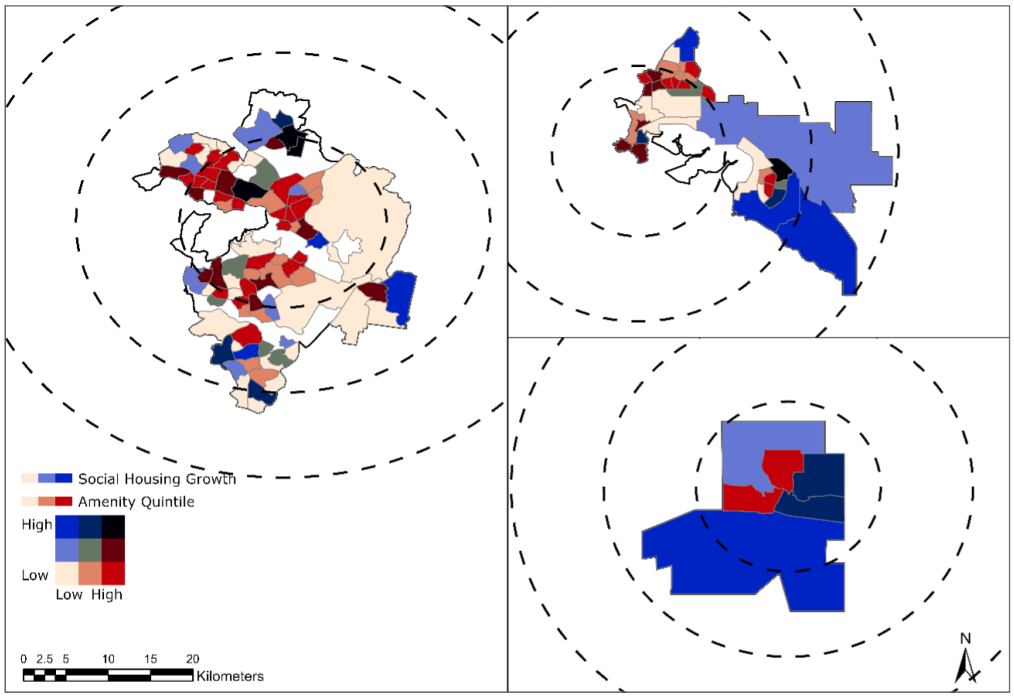
Figure A27: Distribution of social housing growth and amenities across Adelaide SUA



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Figure A28 examines the relationship between social housing growth (2006–21) and amenity levels across Canberra, Darwin and Alice Springs SUAs. Canberra demonstrates significant social housing growth in high-amenity outer-northern suburbs, complemented by moderate growth in southern-outer suburbs with medium-amenity levels, while inner suburbs experienced decline. Darwin exhibits social housing growth concentrated around the CBD, with mixed patterns in northern airport-adjacent suburb, and predominantly positive growth in eastern regions, despite their lower amenity levels. In Alice Springs, SA2s west of the Todd River, encompassing the CBD and the suburbs of Braitling and Gillen, show declining social housing stock, contrasting with growth in remaining SA2s.

Figure A28: Distribution of social housing growth and amenities across Canberra, Darwin and Alice Springs SUAs



Source: Social housing data obtained via ABS (2023); amenity quintiles constructed using data from OSM (2022).

Appendix 3: Social housing and amenity tables

Table A1: Social housing and high-amenity SA2s

	Amenity quintile	Total housing stock 2021	Proportion social housing	Median house quartile	Increase/decrease as a proportion of stock	Proportion separate houses
NSW						
Sydney (South) – Haymarket	5	10,077	0.3%	5	0.1%	0%
Bondi Beach – North Bondi	4	10,443	1.2%	5	–0.1%	9%
North Sydney – Lavender Bay	4	7,712	0.6%	5	–2.2%	5%
Chatswood – East	4	8,549	1.1%	5	–0.1%	24%
Dee Why – North	4	8,529	1.2%	5	–0.5%	10%
Paddington – Moore Park	4	7,801	0.8%	5	0.3%	7%
Bondi – Tamarama - Bronte	4	8,861	1.7%	5	0.4%	15%
Terrigal – North Avoca	4	6,668	0.3%	5	0.0%	69%
Randwick – North	4	7,678	1.1%	5	–0.1%	11%
Double Bay – Darling Point	5	5,908	0.1%	5	–0.4%	8%
Vic						
Melbourne CBD – West	5	13,313	0.3%	1	0.3%	0%
Southbank – East	5	12,339	0.1%	3	0.1%	0%
Melbourne CBD – North	5	13,092	0.6%	1	–1.3%	0%
Docklands	4	10,790	1.0%	4	1.0%	1%
Caulfield – North	4	10,361	1.1%	5	0.0%	34%
South Yarra – North	5	8,436	0.0%	5	0.0%	2%
Malvern – Glen Iris	4	9,688	1.1%	5	0.1%	37%
Glen Waverley – East	4	8,063	0.4%	5	0.2%	89%
Carnegie	4	9,426	1.4%	2	0.3%	29%
Toorak	4	7,243	0.0%	5	0.0%	29%

Table A1 (continued): Social housing and high-amenity SA2s

	Amenity quintile	Total housing stock 2021	Proportion social housing	Median house quartile	Increase/decrease as a proportion of stock	Proportion separate houses
Qld						
Mermaid Beach – Broadbeach	5	10,125	0.3%	5	0.2%	8%
Surfers Paradise – South	5	9,689	0.4%	5	0.4%	9%
Surfers Paradise – North	5	8,966	0.5%	5	0.1%	6%
Brisbane City	5	7,561	0.3%	4	–0.1%	5%
Newstead – Bowen Hills	4	11,327	2.4%	5	–1.7%	4%
South Brisbane	5	7,926	0.9%	5	–0.3%	4%
Burleigh Waters	5	5,790	0.7%	4	0.1%	70%
Currumbin – Tugun	4	6,140	1.1%	4	0.0%	37%
Coorparoo	4	8,312	2.5%	5	–0.4%	40%
St Lucia	4	4,592	0.0%	5	–0.3%	31%
SA						
Glenelg	4	10,934	2.0%	5	–1.5%	40%
Burnside – Wattle Park	4	8,030	0.8%	5	–0.1%	72%
Toorak Gardens	4	7,591	1.9%	5	–0.2%	53%
Unley – Parkside	4	9,253	3.0%	5	–0.6%	55%
Goodwood – Millswood	4	8,024	2.8%	5	–0.1%	59%
Colonel Light Gardens	4	6,362	2.2%	5	0.2%	73%
Rostrevor – Magill	4	10,149	3.9%	4	–0.9%	73%
Henley Beach	4	6,883	3.0%	5	–2.0%	64%
Plympton	4	12,079	4.4%	4	–1.0%	57%
Brighton	4	6,740	3.0%	5	0.2%	66%
WA						
Morley	4	9,703	1.4%	3	0.4%	83%
Canning Vale – East	4	7,645	0.2%	3	–0.1%	92%
Scarborough	5	9,143	1.4%	4	–0.2%	34%
Melville	4	7,023	0.4%	5	0.1%	75%
Karrinyup – Gwelup – Carine	4	8,155	1.3%	5	–0.9%	86%
South Perth – Kensington	4	8,859	1.7%	5	–0.6%	41%
Nedlands – Dalkeith – Crawley	5	7,147	1.0%	5	0.0%	65%
Victoria Park - Lathlain – Burswood	4	8,233	1.9%	4	–0.5%	41%
Success – Hammond Park	4	6,497	0.8%	3	0.6%	79%
Willetton	5	6,506	1.0%	5	0.1%	90%

Table A1 (continued): Social housing and high-amenity SA2s

	Amenity quintile	Total housing stock 2021	Proportion social housing	Median house quartile	Increase/decrease as a proportion of stock	Proportion separate houses
Tas						
Sandy Bay	5	5,459	0.8%	5	−0.8%	67%
Launceston	5	2,672	1.6%	5	0.2%	53%
Newstead	4	2,473	1.6%	5	−1.5%	75%
Norwood	4	1,700	1.4%	4	0.5%	88%
West Hobart	4	2,871	3.7%	5	−0.3%	76%
Burnie – Wivenhoe	5	1,937	4.1%	1	0.0%	83%
NT						
Darwin City	5	4,098	1.2%	5	−2.5%	1%
Nightcliff	4	1,795	1.7%	5	−2.6%	34%
Palmerston – North	4	1,624	2.0%	2	−0.5%	86%
Rapid Creek	4	1,511	2.3%	5	−0.3%	39%
Larrakeyah	4	1,745	3.0%	5	−0.9%	20%
Leanyer	4	1,794	3.7%	3	−1.4%	71%
ACT						
Kingston	5	4,193	1.1%	5	−3.2%	3%
Civic	5	2,488	0.2%	-	−2.9%	0%
Bruce	4	2,963	1.1%	3	0.8%	20%
Franklin	4	2,850	1.0%	3	−4.5%	48%
Queanbeyan	4	5,627	3.7%	1	0.3%	40%
Campbell	4	2,348	1.4%	5	−0.6%	40%
Phillip	5	3,011	2.7%	1	−3.5%	0%
Gungahlin	5	3,635	3.5%	3	1.4%	35%
Braddon	5	4,142	4.1%	4	−13.0%	5%
Belconnen	5	4,731	4.8%	1	−8.3%	0%

Source: Authors

Table A2: Social housing and low-amenity SA2s

	Total housing stock 2021	Proportion social housing	Change in social housing dwellings 2006–11	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
NSW						
Ashcroft – Busby – Miller	6,202	27.8%	–29	1	–3.4%	–3.4%
Bidwill – Hebersham – Emerton	6,455	24.1%	–193	1	–4.9%	–4.9%
Lethbridge Park – Tregear	7,559	19.7%	–324	1	–16.1%	–16.1%
Lurnea – Cartwright	4,313	19.4%	144	1	–0.2%	–0.2%
Macquarie Fields	5,119	18.6%	–152	1	–3.8%	–3.8%
Guildford – South Granville	7,274	15.9%	260	2	–0.4%	–0.4%
Warwick Farm	2,942	15.5%	–14	1	–9.9%	–9.9%
Bonnyrigg Heights – Bonnyrigg	5,196	14.0%	–140	1	–5.7%	–5.7%
Bass Hill – Georges Hall	7,538	13.2%	50	2	–1.9%	–1.9%
Fairfield – East	5,165	13.1%	109	1	–3.4%	0.5%
Vic						
Corio – Lovely Banks	7,238	7.6%	–62	1	–1.5%	92%
Meadow Heights	4,768	7.3%	–18	1	–1.0%	81%
Newcomb – Moolap	7,126	6.3%	41	1	–0.4%	86%
Moe – Newborough	8,460	6.2%	–36	-	–1.3%	82%
Mildura – North	8,423	6.2%	–47	2	–1.5%	76%
Mooroopna	3,520	6.1%	14	1	–0.6%	84%
Echuca	6,966	5.5%	–24	-	–2.2%	86%
California Gully – Eaglehawk	5,748	5.5%	–51	1	–3.8%	95%
Traralgon – East	5,336	5.4%	–21	-	–2.0%	83%
Shepparton – South East	6,819	5.3%	25	3	–0.5%	88%
Qld						
Wacol	1,027	23.1%	–25	1	–5.2%	87%
Inala – Richlands	6,971	20.0%	–118	1	–9.8%	75%
Riverview	1,171	17.6%	–113	1	–11.8%	96%
Rocklea – Acacia Ridge	3,970	10.9%	4	1	–1.1%	85%
Coopers Plains	2,317	9.8%	60	3	0.7%	73%
Carina Heights	3,031	9.4%	–22	4	–3.3%	53%
Leichhardt – One Mile	3,446	8.5%	–34	1	–6.1%	88%
Loganlea	4,365	8.2%	–29	1	–4.7%	76%
Mount Gravatt	6,602	7.9%	9	4	–1.4%	65%
Slacks Creek	3,988	7.8%	–108	1	–3.3%	77%

Table A2 (continued): Social housing and low-amenity SA2s

	Total housing stock 2021	Proportion social housing	Change in social housing dwellings 2006–11	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
SA						
The Parks	7,695	16.9%	−364	2	−8.9%	66%
Hackham West – Huntfield Heights	3,427	15.8%	−181	1	−7.9%	87%
Whyalla	10,911	14.2%	−460	-	−6.5%	53%
Port Augusta	6,215	10.7%	−222	-	−5.1%	78%
Elizabeth East	5,663	10.1%	−233	1	−5.6%	81%
Port Pirie	6,856	9.1%	−122	-	−3.1%	82%
Salisbury North	6,826	9.0%	−60	1	−4.3%	81%
North Haven	6,738	8.6%	−105	3	−3.2%	72%
Greenwith	3,484	8.2%	−75	3	−2.2%	97%
Pooraka – Cavan	3,289	7.6%	−16	2	−1.1%	85%
WA						
Broome	5,822	13.6%	184	-	−2.6%	79%
South Hedland	4,941	11.8%	223	-	0.1%	66%
McKail – Willyung	4,508	7.6%	111	1	−0.1%	95%
Karratha	7,230	6.6%	1	-	−4.3%	75%
Geraldton	6,225	6.3%	−90	1	−2.4%	73%
Kalgoorlie – North	3,809	5.8%	26	4	0.1%	83%
Calista	3,347	5.8%	19	1	−0.4%	88%
Dalyellup	3,624	5.7%	177	2	3.3%	94%
Kalgoorlie	5,600	5.3%	−45	2	−1.7%	75%
Lockridge – Kiara	4,697	4.3%	−24	2	−3.1%	89%
Tas						
Bridgewater – Gagebrook	3,304	29.9%	66	1	−4.3%	90%
Ravenswood	1,705	25.2%	13	1	−1.4%	79%
Newnham – Mayfield	3,893	12.9%	0	1	−2.4%	78%
West Ulverstone	1,942	9.5%	-8	-	−2.1%	90%
Wynyard	3,025	9.0%	11	4	−2.9%	90%
Claremont	3,724	8.9%	82	1	0.9%	72%
Waverley - St Leonards	1,647	8.6%	3	1	−2.5%	87%
Berriedale – Chigwell	2,488	8.4%	−33	1	−3.5%	84%
Latrobe	2,368	7.8%	87	4	1.3%	94%
Risdon Vale	1,252	7.7%	−43	1	−4.9%	93%

Table A2 (continued): Social housing and low-amenity SA2s

	Total housing stock 2021	Proportion social housing	Change in social housing dwellings 2006–11	Median house quartile	Increase/ decrease as a proportion of stock	Proportion separate houses
NT						
Moulden	1,208	17.3%	−67	1	−5.8%	81%
Ludmilla – The Narrows	1,029	15.5%	−46	3	−2.0%	68%
Larapinta	1,958	10.4%	34	1	0.4%	71%
Berrimah	472	9.7%	9	1	0.8%	68%
Ross	887	8.8%	20	5	−0.8%	84%
Tiwi	923	5.5%	−15	2	−1.0%	75%
Lyons	1,863	2.7%	45	4	−21.1%	87%
Palmerston – South	2,325	2.5%	57	3	−1.0%	79%
ACT						
Richardson	1,172	11.4%	−35	1	−3.0%	96%
Rivett	1,387	11.2%	28	2	1.5%	86%
Canberra East	328	10.4%	−4	1	1.4%	52%
Taylor	676	10.2%	69	3	10.2%	82%
Oxley	653	10.1%	−17	2	−2.7%	92%
Karabar	3,440	9.8%	−32	1	−1.0%	79%
Spence	1,001	9.2%	−28	2	−3.2%	91%
Jacka	255	9.0%	23	2	9.0%	44%
Downer	1,772	8.9%	13	4	−0.8%	67%
Gilmore	1,000	8.5%	−19	2	−2.3%	93%

Source: Authors

Appendix 4: Modelling the provision of social housing: SA2 examples

Table A3: Building assumptions and outcomes — Model 1

Unit cost	A$600,000
Unit subsidy (%)	20%
Median house price %	80%
Percentage of separate social housing to redevelop	25%
Land area m2	400.0
Min land area	150.0

SA2	Garran	Palmerston	Leanyer	Rapid Creek
State	ACT	ACT	NT	NT
House price quintile	5	3	3	5
Total social housing units	58	114	66	34
Separate social housing dwellings	24	27	31	26
Separate units sold off	6	7	8	7
New social units developed	15	10	8	9
Net gain in social units	9	4	0	2
% increase in social housing	15%	3%	0%	6%

SA2	Cranbrook	Moffat Beach – Battery Hill	Burnie – Wivenhoe	West Hobart
State	Qld	Qld	Tas	Tas
House price quintile	2	4	1	5
Total social housing units	94	133	79	105
Separate social housing dwellings	38	38	59	31
Separate units sold off	10	10	15	8
New social units developed	6	20	10	12
Net gain in social units	–3	10	–5	4
% increase in social housing	–4%	8%	–6%	4%

Table A3 (continued): Building assumptions and outcomes — Model 1

SA2	Brighton (SA)	Goodwood – Millswood	Bassendean – Eden Hill – Ashfield	South Perth – Kensington
State	SA	SA	WA	WA
House price quintile	5	5	3	5
Total social housing units	204	227	375	153
Separate social housing dwellings	69	25	160	81
Separate units sold off	17	6	40	20
New social units developed	34	14	43	36
Net gain in social units	17	8	3	15
% increase in social housing	8%	3%	1%	10%

SA2	Dulwich Hill – Lewisham	Waratah – North Lambton	Flora Hill – Spring Gully	Glen Waverley – East
State	NSW	NSW	Vic	Vic
House price quintile	4	3	2	5
Total social housing units	232	297	142	29
Separate social housing dwellings	41	78	83	29
Separate units sold off	10	20	21	7
New social units developed	27	26	19	19
Net gain in social units	17	6	–1	12
% increase in social housing	7%	2%	–1%	42%

Source: Authors

Table A4: Building assumptions and outcomes — Model 2

Unit cost	A$525,000
Unit subsidy (%)	30%
Median house price %	85%
Percentage of separate social housing to redevelop	40%
Land area m2	450.0
Min land area	120.0

SA2	Garran	Palmerston	Leanyer	Rapid Creek
State	ACT	ACT	NT	NT
House price quintile	4	5	5	4
Total social housing units	58	114	66	34
Separate social housing dwellings	24	27	31	26
Separate units sold off	10	11	12	10
New social units developed	33	23	17	19
Net gain in social units	23	12	5	9
% increase in social housing	40%	11%	7%	25%

SA2	Cranbrook	Moffat Beach – Battery Hill	Burnie – Wivenhoe	West Hobart
State	Qld	Qld	Tas	Tas
House price quintile	4	2	4	2
Total social housing units	94	133	79	105
Separate social housing dwellings	38	38	59	31
Separate units sold off	15	15	24	12
New social units developed	14	43	22	27
Net gain in social units	–2	28	–2	14
% increase in social housing	–2%	21%	–2%	14%

Table A4 (continued): Building assumptions and outcomes — Model 2

SA2	Brighton (SA)	Goodwood – Millswood	Bassendean – Eden Hill – Ashfield	South Perth – Kensington
State	SA	SA	WA	WA
House price quintile	5	2	4	5
Total social housing units	204	227	375	153
Separate social housing dwellings	69	25	160	81
Separate units sold off	28	10	64	32
New social units developed	75	31	96	79
Net gain in social units	48	21	32	47
% increase in social housing	23%	9%	9%	30%

SA2	Dulwich Hill – Lewisham	Waratah – North Lambton	Flora Hill – Spring Gully	Glen Waverley – East
State	NSW	NSW	Vic	Vic
House price quintile	2	5	2	5
Total social housing units	232	297	142	29
Separate social housing dwellings	41	78	83	29
Separate units sold off	16	31	33	12
New social units developed	62	57	43	44
Net gain in social units	45	26	10	32
% increase in social housing	19%	9%	7%	110%

Source: Authors

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