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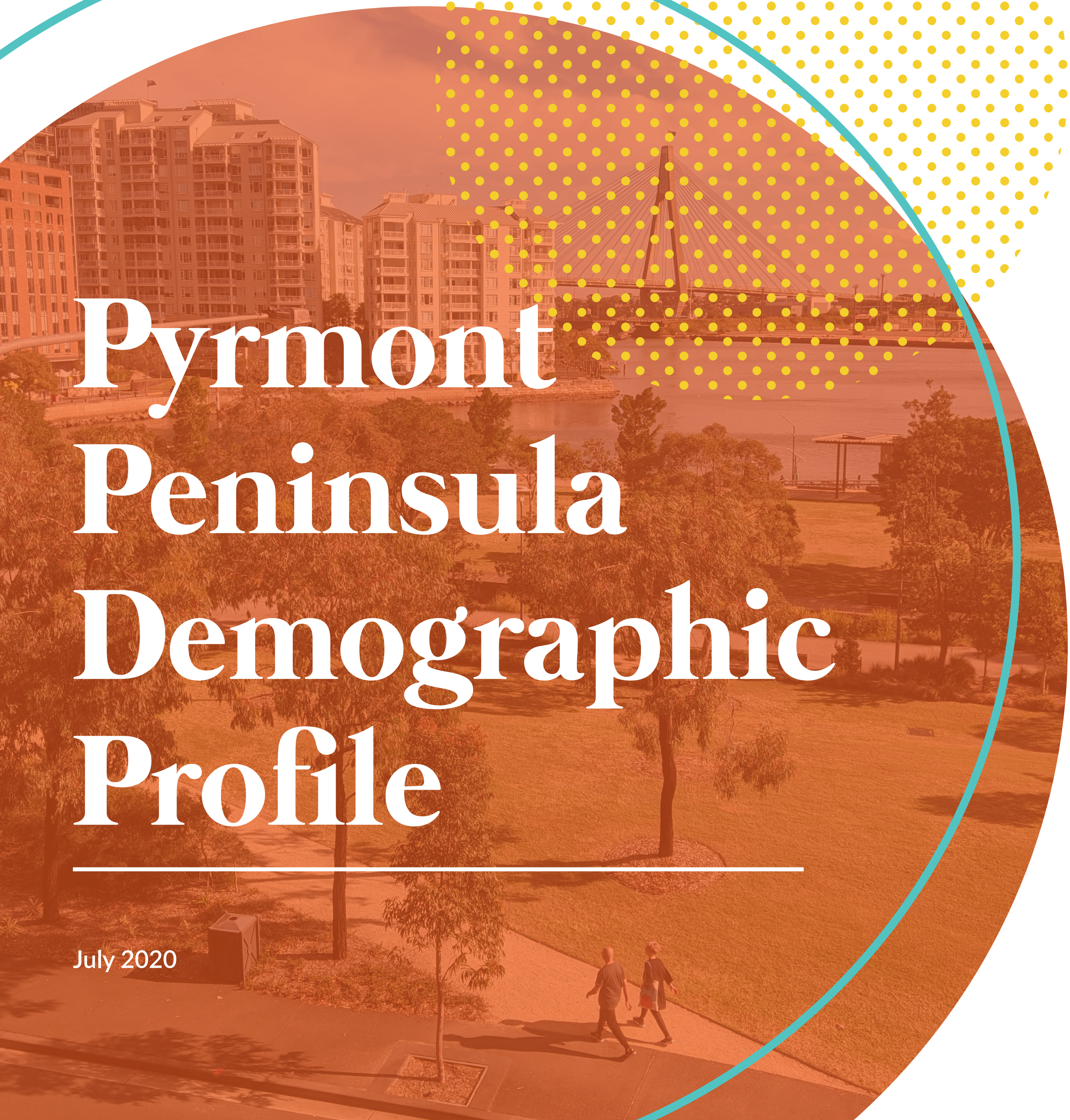

Pyrmont Peninsula Demographic Profile

July 2020

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Executive summary

The Department of Planning, Industry and Environment (the department) is leading the development of the Pyrmont Peninsula Place Strategy (the Place Strategy) in response to the Greater Sydney Commission's review of planning for the Western Harbour Precinct, including the Pyrmont Peninsula. This is a summary of the current and forecast demographic characteristics of the Pyrmont Peninsula, including the many, diverse and growing number of residents, workers and visitors who live, work and play here and how they, and the temporal nature of the community, inform planning for the Place Strategy.

2016 census population characteristics

Current demographic characteristics for the Pyrmont Peninsula are based on the 2016 ABS Census of Population and Housing, with data reflecting the combined Usual Resident Population of the Statistical Area Level 1 (SA1) geographic areas located within the Pyrmont Peninsula boundaries (see Figure 2 on page 9).

The Pyrmont Peninsula is a high density area characterised by a relatively young population that is highly culturally diverse and highly educated. There are many students with abundant educational and employment opportunities located within close proximity. Overall, there is a high proportion of residents who walk to work, but comparatively lower proportions who use public transport, compared to the City of Sydney Local Government Area (LGA).

In 2017, there were more than 36,000 workers in the Pyrmont Peninsula and a large number of day and overnight visitors who come to the area each day to study, shop, visit museums, galleries and parks and participate in tourist activities.

Total current population

At the time of the 2016 census, the usual resident population of the Pyrmont Peninsula was 18,654. In 2020, the population of the Pyrmont Peninsula is estimated by the department at around 20,500.

The Pyrmont Peninsula population is young

The Pyrmont Peninsula population is characterised by a young age profile with a median age of 31 (younger than the LGA at 32 and Greater Sydney at 36 years) and the most populous groups span 18-49 years of age. The median age differs across suburbs, with a significantly younger median age of 26 years in Ultimo (due to a high number of students) and an older median age of 34 years in Pyrmont.

The population is culturally diverse

The Pyrmont Peninsula is culturally diverse and home to people from over 50 countries. More than half of residents were born overseas (56%), significantly higher compared to the LGA (48%) and Greater Sydney (37%). The population of overseas born residents is significantly higher (70%) in Ultimo. The main overseas country of birth is China (11%), followed by the United Kingdom, South Korea, India, Thailand, New Zealand, Indonesia and Malaysia.

The population is educated, with many students

With the University of Technology Sydney and TAFE NSW within the Peninsula, and University of Sydney campuses nearby, the Pyrmont Peninsula is home to many students. In 2016, 14% of residents were attending University and 3% were attending TAFE, higher than the LGA and Greater Sydney at 6% and 2% respectively. When comparing suburbs within the Pyrmont Peninsula, the majority of students live in Ultimo (37% of residents) as opposed to Pyrmont (6% of residents).

The Pyrmont Peninsula is characterised by high density housing

The vast majority of residents live in high density dwellings (90%), much higher compared to the LGA (75%). The Pyrmont Peninsula has a high population density of 133 persons per hectare, compared to the LGA (78 persons per hectare) and Greater Sydney (4 persons per hectare).

There are fewer lone person households, and more couple and group households compared to the LGA

The Pyrmont Peninsula is characterised by a much lower proportion of 'lone person' households (26%) compared to the LGA (33%), and a higher proportion of 'couples without children', 'couples with children' and 'group' households.

There are a range of incomes across the Pyrmont Peninsula

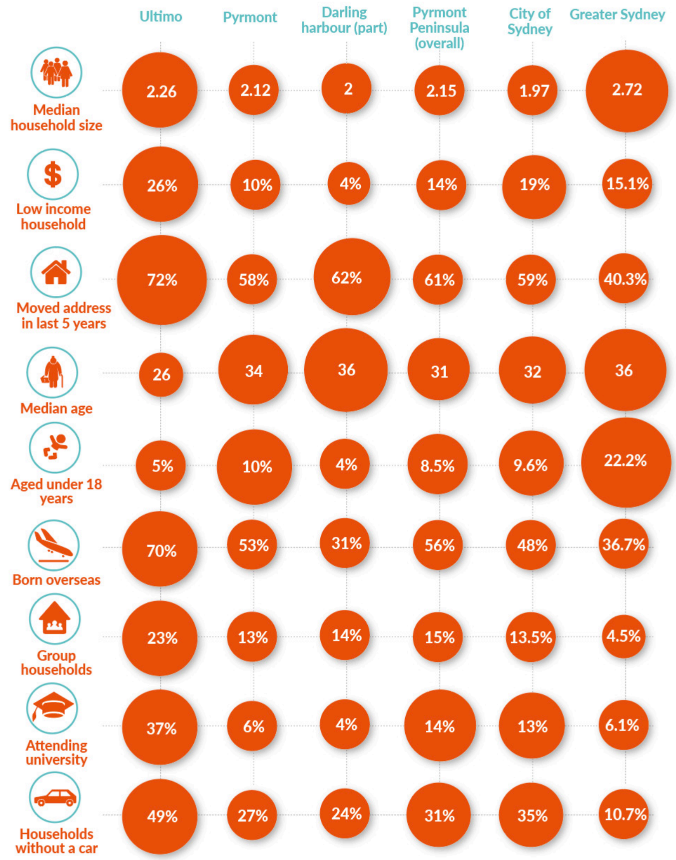
Overall, the Pyrmont Peninsula has a higher than average household weekly income of $2,136 compared to the LGA at $1,915 and Greater Sydney at $1,745. But income varies across suburbs with a low median income of $1,197 in Ultimo and significantly higher at $2,273 in Pyrmont.

Walking is the most popular mode of travel to work and public transport use is low

In 2016, the majority of the population walked to work (38%), significantly higher than the LGA (24%) and Greater Sydney (4%). A significantly lower proportion of residents travel to work by public transport (22%) compared to 35% across the LGA.

Demographic differences between suburbs

As noted, there are unique demographic differences across suburbs within the Pyrmont Peninsula, which include Ultimo, Pyrmont and a small part of Darling Harbour. These differences influence place-based planning and infrastructure and service needs. These are particularly noted around students living in the Pyrmont Peninsula, household income, cultural diversity and residents who have moved from the area in the past 5 years as shown below:



Larger circles represents the most significant demographic indicator

Jobs in the Pyrmont Peninsula

The City of Sydney's Floor Space and Employment Survey, 2017 (FES) indicates that there are 36,919 workers, working in the Pyrmont Peninsula, a 20.3% increase since 2012. In 2017, the top 5 employment industries were:

- Creative Industries (6,741 workers, 18.3% of total employment)
- Higher Education and Research (6,490 workers, 17.6% of total employment)
- ICT (6,323 workers, 17.1% of total employment)
- Tourist Cultural and Leisure (5,736 workers, 15.5% total employment), and
- Professional and Business Services (5,324 workers, 14.4% of total employment).

Visitors

The City of Sydney Baseline Infrastructure Assessment Study (2019) identifies that the City of Sydney experiences 680,000 daily and overnight visitors for a range of purposes and services including:

- Shopping
- Health and education
- Recreation and entertainment
- Accommodation
- Personal business
- Work related business.

This data is not available specifically for the Pyrmont Peninsula study area.

Temporal impacts of population on place

The Pyrmont Peninsula is a diverse, mixed use area with local, regional and metropolitan significant places and spaces that attract a range of day, overnight and short term workers and visitors in addition to the people that live within the Peninsula. This means that at different times of the week and year, there is a changing number of people moving around, visiting, socialising and recreating that impacts on access to facilities, open space, the public domain and services. The temporal nature of the Pyrmont Peninsula community includes:

- Approximately 37,000 workers utilising open space and recreation facilities before and after work and at lunch times; requiring quality local spaces for breaks and for flexible work practices; active transport connections; good public transport; and access to retail, food services and entertainment.
- Thousands of students, who visit each day and access parks, recreation facilities (including courts and leisure centres) and community facilities such as libraries.
- Tourists, including those staying in the more than 3,200 hotel rooms/serviced apartments who seek to visit local parks, museums/galleries and other cultural facilites, and use local active and public transport, access retail, entertainment and food services.
- Transient populations, including the 72% of residents who live in Ultimo (most likely students) who have moved at least once in the past 5 years.

This influences the demand on facilities within the Pyrmont Peninsula by:

- Increased demand on weekdays by workers (particularly before work and at lunchtimes) for use of parks, leisure centres and recreation facilities; high use of active transport routes, and increased access and use of public transport;
- Higher student demand during university term for libraries, parks, leisure centres and recreation facilities (particularly outdoor courts and free spaces); and
- Higher use of footpaths and active transport links, public transport and parking demand during tourist season,

Forecast population

Forecast resident and worker populations for the Pyrmont Peninsula are based on scenario modelling by Hassell, the department's main series population forecasts, and the Economic Development Strategy (PWC, July 2020). It assumes the inclusion of a metro station within the Pyrmont Peninsula. The NSW Government is continuing to investigate the feasibility of building a metro station in Pyrmont. This includes further industry engagement and transport and economic modelling to assess its feasibility and affordability. and includes the assumption of a metro station.

Resident population growth

An additional 3,991 dwellings equating to 8,500 residents are forecast to 2041 based on a household size of 2.13 person per household.

Table 1 - Forecast resident population growth scenario 1 (source: Hassell based on the department main series population projections to 2041)

Year	Population	Change
2021	20,500	
2041	29,000	+8,500

Employment growth

An additional 23,000 jobs are forecast across the Pyrmont Peninsula by 2041. Forecasts are based on the Economic Development Strategy (PWC, July 2020).

Table 2 - Forecast job growth scenario 1 (source: EDS, PWC July 2020)

Year	Jobs	Change
2021	37,000	
2041	60,000	+23,000

Forecast growth by sub-precinct

The Place Strategy identifes a number of sub- precincts within the Pyrmont Peninsula which will have differing growth scenarios and may result in unique social infrastructure needs and opportunities. The sub-precincts include:

- Pirrama
- Darling Island
- Pyrmont Village
- Tumbalong Park
- Ultimo
- Wentworth Park, and
- Blackwattle Bay.

Table 3 presents forecast resident and employment growth by sub-precinct. It shows that the areas forecast to support the largest residential growth is Ultimo, Blackwattle Bay and Tumbalong Park. The areas forecast to support the largest employment growth include Ultimo, Blackwattle Bay, Tumbalong and Darling Island.

Table 3 - Forecast growth 2021 - 2041 by sub-precinct

Sub-precinct	Forecast resident growth (2021 - 2041)	Forecast job growth (2021 - 2041)
Pirrama	+190	+350
Pyrmont Village	+135	+1,380
Darling Island	+600	+2,730
Blackwattle Bay	+2,055	+5,770
Tumbalong Park	+2,055	+2,870
Wentworth Park	+1,115	+1,200
Ultimo	+2,350	+8,700
Total growth	**+8,500**	**+23,000**

1. Introduction

This report provides a current and forecast demographic profile of the Pyrmont Peninsula to inform the development of the Pyrmont Peninsula Place Strategy (the Place Strategy). The Department of Planning, Industry and Environment (the department) is leading the development of the Place Strategy in response to the Greater Sydney Commission's review of planning for the Western Harbour Precinct, including the Pyrmont Peninsula.

1.1. Background and purpose of this report

This report provides a current (2016) and forecast (2041) resident, worker, and visitor profile of the Pyrmont Peninsula located within the City of Sydney Local Government Area (LGA), with the aim to understand the population dynamics of the Pyrmont Peninsula now and in the future.

The current profile is based on data from the 2016 Census of Population and Housing released by the Australian Bureau of Statistics (ABS). The forecast profile is based on scenario modelling by Hassell, the department's main series population forecasts, and the Economic Development Strategy (PWC, July 2020).

This report includes current and forecast data on age, cultural diversity, education, employment, industry sectors of employment, as well as household income, composition, dwelling type, tenure, internet connection and motor vehicle ownership of the resident population within the Pyrmont Peninsula. It also provides current and forecast profiles of workers and visitors to the area, with analysis of the impacts of the temporal nature of these communities at different times of the year.

1.2. About the Pyrmont Peninsula

Location and boundaries

The Pyrmont Peninsula is located in the north of the City of Sydney LGA and is broadly defined by the Greater Sydney Commission's boundaries as shown in Figure 1. The Pyrmont Peninsula is bounded by Johnston's Bay and Darling Harbour in the north, the Goods Line, Pier Street and Harbour Street in the east, Broadway in the south and Wattle Street and Blackwattle Bay in the west.

The Pyrmont Peninsula encompasses the whole of Pyrmont and most of Ultimo suburbs, as well as a part of Darling Harbour (including Tumbalong Park). The Pyrmont Peninsula aligns closely, but due to the inclusion of part of Darling Habour, not exactly, with the City of Sydney's Harris Street Village area boundaries.

This boundary has been adopted to guide the Place Strategy. While we do not expect the boundary will change significantly, it may be adjusted and refined as we complete different stages of our work in the coming months and as we obtain better information and further feedback from community and stakeholders.

Figure 1 - Pyrmont Peninsula boundary, Department of Planning, Industry and Environment

Land use

The Pyrmont Peninsula accommodates a diverse range of residential, commercial, industrial, cultural, entertainment and educational land uses as well as leisure and sport facilities.

Major features

Major features of the Pyrmont Peninsula include University of Technology Sydney (City Campus Broadway), TAFE NSW Sydney Institute (Ultimo College), Sydney Fish Market, Waterfront Arcade, Powerhouse Museum, The Star (Casino & Entertainment Centre), Ian Thorpe Aquatic Centre, ABC Ultimo Centre, Fig Lane Park, Giba Park, James Watkinson Reserve, Mary Ann Park, McKee Street Playground, Metcalfe Park, Pirrama Park, Pyrmont Bay Park, Waterfront Park, Wentworth Park, Pyrmont Bay Marina, Jones Bay Wharf and Ultimo Public School, Darling Harbour entertainment precinct and Tumbalong Park.

Sub-precincts

The Place Strategy identifes a number of sub- precincts within the Pyrmont Peninsula which will have differing growth scenarios and may result in unique social infrastructure needs and opportunities. The sub-precincts include:

- Pirrama
- Darling Island
- Pyrmont Village
- Tumbalong Park
- Ultimo
- Wentworth Park, and
- Blackwattle Bay.

Source data and analysis

2016 demographic profile

2016 resident population data is based on:

- 2016 ABS Census data accessed via .id community demographic resources for the City of Sydney.
- Statistical Area Level 1 (SA1) geographical areas have been used to align as closely as possible with the Pyrmont Peninsula, as shown in Figure 2 on page 9. It is noted that SA1133128 is Wentworth Park and has 0 resident population and SA1133741 is Tumbalong Park in Darling Harbour and has 0 resident population.

Current worker data is sourced from the City of Sydney's Floor Space and Employment Survey, 2017, aligned to the Pyrmont Peninsula's boundaries.

Current visitor data is sourced from the City of Sydney, however is only available at an LGA wide level.

Forecast demographic profile

Forecast resident and worker populations for the Pyrmont Peninsula are based on scenario modelling by Hassell, the department's main series population forecasts, and the Economic Development Strategy (PWC, July 2020). It assumes the inclusion of a metro station within the Pyrmont Peninsula. The NSW Government is continuing to investigate the feasibility of building a metro station in Pyrmont. This includes further industry engagement and transport and economic modelling to assess its feasibility and affordability.

Definitions

City of Sydney: The Local Government Area (LGA) bounded by Port Jackson in the north, Woollahra Municipal Council and Randwick City Council in the east, the Bayside Council in the south and Inner West Councils in the west.

Greater Sydney: Greater Sydney (Greater Capital City Statistical Area), as classified by ABS, extends from Wyong and Gosford in the north to the Royal National Park in the south and follows the coastline in between. Towards the west, the region includes the Blue Mountains, Wollondilly and Hawkesbury. Greater Sydney covers 12,368.2sq km and is made up of 35 local councils.

Usual Resident Population (URP): Refers to the Census count of the Usual Resident Population of an area. Each person is required to state their address of usual residence in the Census. The URP forms the basis of the Estimated Resident Population. The URP is used to understand the characteristics of people who reside in an area.

Estimated Resident Population (ERP): Refers to the official measure of the population, after adjustments have been made to account for residents who were missed in the Census and those overseas on Census night. The ERP includes usual residents who are overseas for fewer than 12 months and excludes overseas visitors who are in Australia for fewer than 12 months. The ERP is used as the basis for populaton forecasts and is updated annually.

Enumerated Data: The place of enumeration is the place at which the person is counted i.e. where they spent Census night, which may not be where they usually live.

Service groups: Service age groups divide the population into age categories that reflect typical life-stages. They give an indication of the level of demand for services that target people at different stages in life and how that demand is changing.

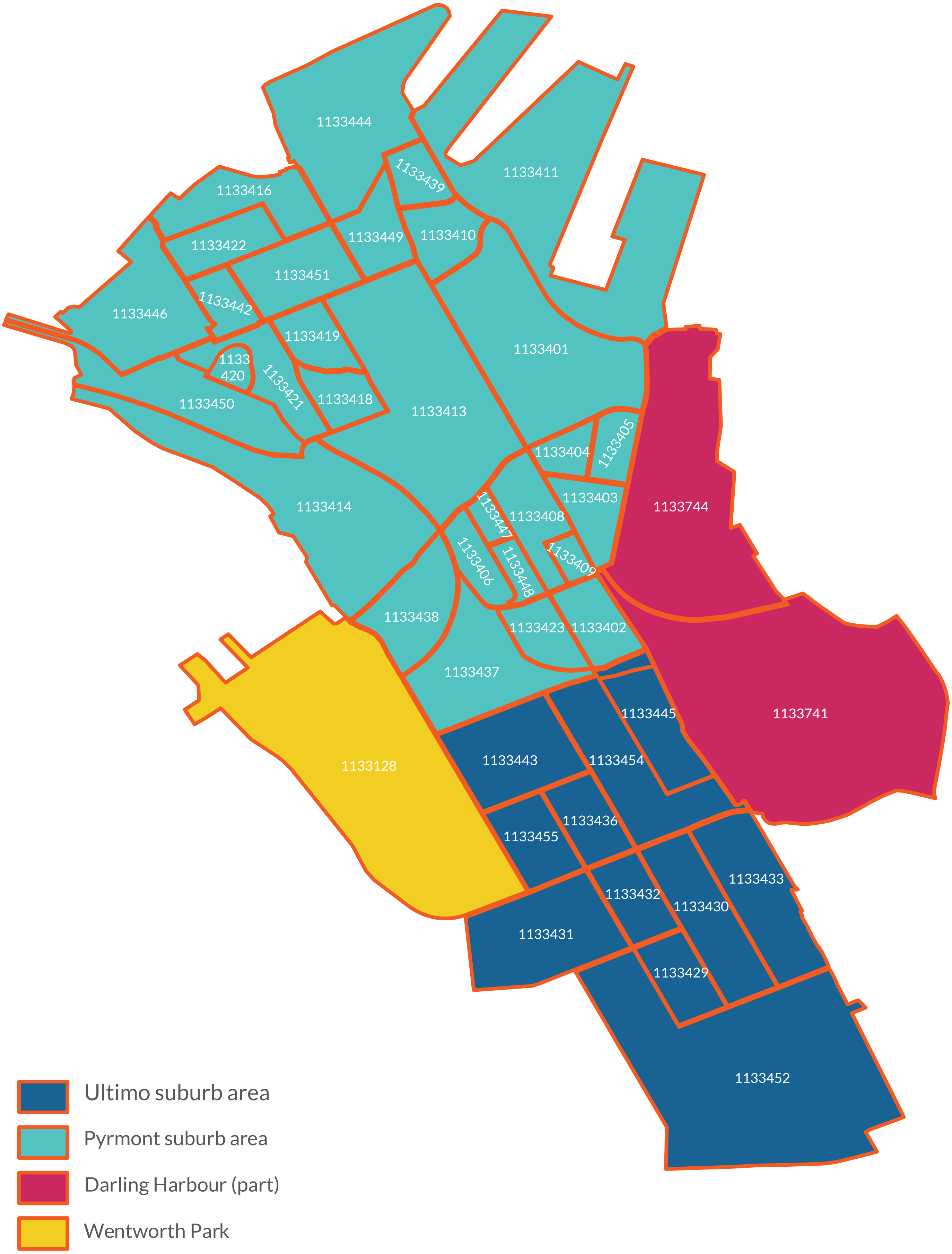


Figure 2 - Pyrmont Peninsula - SA1 boundaries

2. Current population characteristics

This chapter provides an analysis of the current population characteristics of the Pyrmont Peninsula based on 2016 ABS Census data (URP) for SA1s within the Pyrmont Peninsula (as shown in Figure 2 on page 9). It covers resident population, service age groups, cultural diversity, education, employment status, industry sectors of employment, as well as household income, composition, dwelling type, tenure, internet connection, travel to work, and motor vehicle ownership. It also covers workers and visitors to the area, based on information from the City of Sydney, with discussion of the impacts of temporal aspects of the Pyrmont Peninsula's community on place and access to facilities and services.

2.1. Total population

At the time of the 2016 census, the population (URP) of the Pyrmont Peninsula was 18,654.

2.2. Population density

The Pyrmont Peninsula is characterised by a very high population density (133 persons per hectare) compared to the City of Sydney LGA (78 persons per hectare) and Greater Sydney (4 persons per hectare).

Note: Population density has been calculated by dividing the total population of the Pyrmont Peninsula by the total residential land area of all SA1s included within the Pyrmont Peninsula. This means that SA1s without a residential population such as Wentworth Park and Tumbalong Park have not been included in the density calculations.

Figure 3 - Population growth, 2011-2016 (URP)

2.3. Service age structure trends

The Pyrmont Peninsula population is characterised by a relatively young age profile with a median age of 31 (younger than the LGA at 32 and Greater Sydney at 36 years). Table 4 provides a breakdown of age characteristics by service age group that reflect typical life-stages. As shown in Table 1, the most populous age groups span 18-49 years of age and can be broken into three service age groups:

- 'Tertiary Education and Independence' aged 18-24 years (17% of the total Pyrmont Peninsula population)
- 'Young workforce' aged 25-34 years (32%), and
- 'Parents and Homebuilders' aged 35-49 years (22%)

While overall the service age structure is similar to that of the LGA, in 2016 the Pyrmont Peninsula had a slightly higher proportion of residents aged 17 years or younger (9% compared to 8%).

As shown in Figure 5 on page 12, between 2011 and 2016, in absolute terms (number of), the strongest growth across age groups was in residents aged 18 to 24 years (+790) and of residents aged 35 years and older, while the largest decline was in the number of people aged 25 to 34 years (-224). This trend aligns with the pattern of tertiary education students moving into the area to study, and leaving upon graduation, a result of the Pyrmont Peninsula's close proximity to several higher education institutions.

In relative terms (percentage) the largest growth is in the older age groups including 75 to 84 year olds (+48%) and people aged 85 years and over (56%). This trend aligns with Australia's ageing population, a result of the 1950s baby boom and improved technological and health care outcomes.

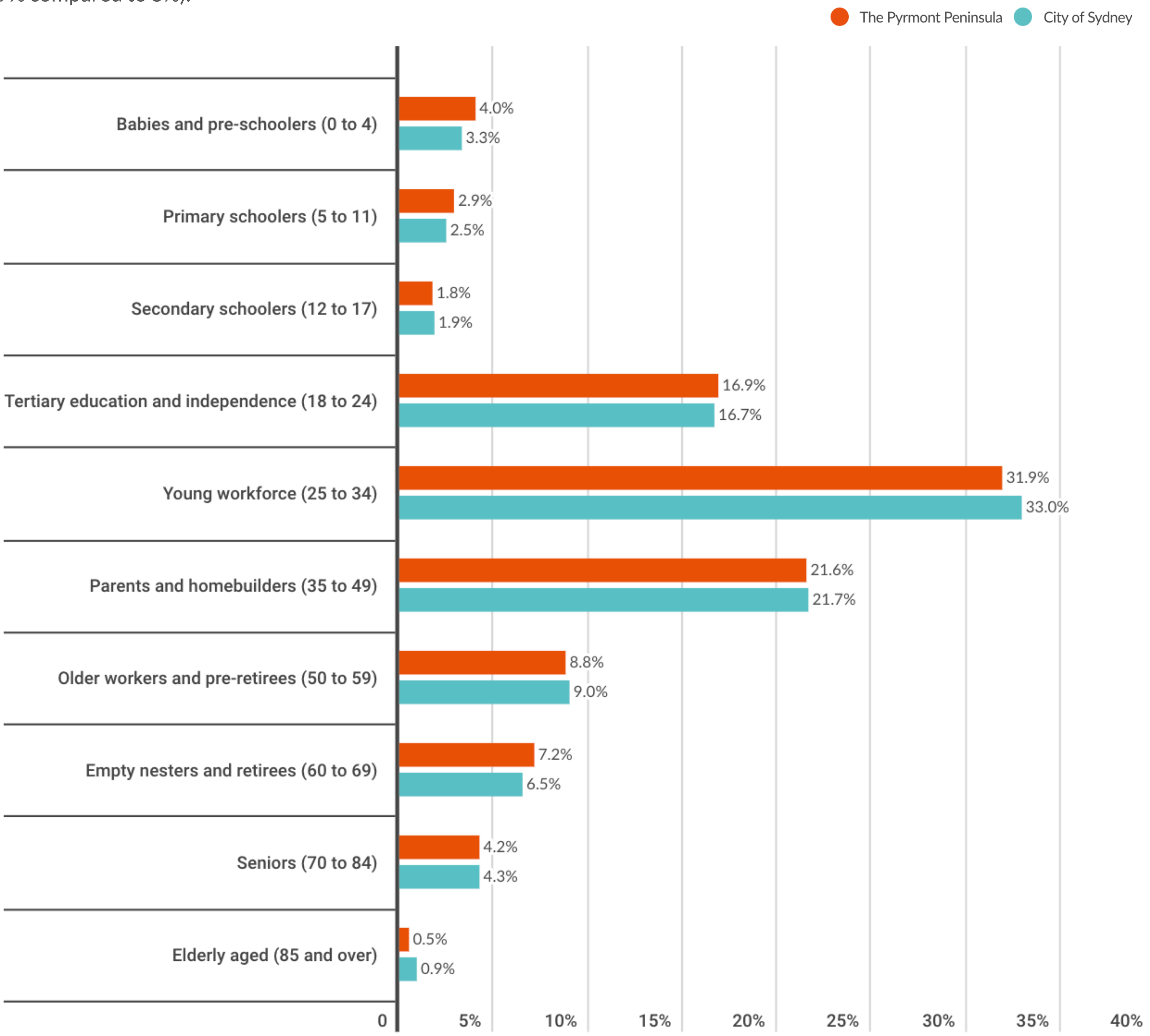


Figure 4 - Proportion of residents by service age group Pyrmont Peninsula compared to LGA, 2016 (URP)

Table 4 - Service age structure trends Pyrmont Peninsula compared to LGA, 2011-2016 (URP)

Service age group	2016 (URP)			2011 (URP)			Change 2011-2016
	Pyrmont Peninsula #	Pyrmont Peninsula %	City of Sydney %	Pyrmont Peninsula #	Pyrmont Peninsula %	City of Sydney %	#
Babies and pre-schoolers (0 to 4)	745	4	3.3	691	4.1	3.6	+54
Primary schoolers (5 to 11)	544	2.9	2.5	486	2.9	2.6	+58
Secondary schoolers (12 to 17)	332	1.8	1.9	349	2.1	2.0	-17
Tertiary education and independence (18 to 24)	3,150	16.9	16.7	2,360	14.1	14.8	+790
Young workforce (25 to 34)	5,957	31.9	33.0	6,181	36.8	32.6	-224
Parents and homebuilders (35 to 49)	4,030	21.6	21.7	3,595	21.4	23.1	+435
Older workers and pre-retirees (50 to 59)	1,650	8.8	9.0	1,507	9.0	9.5	+143
Empty nesters and retirees (60 to 69)	1,349	7.2	6.5	1,024	6.1	6.5	+325
Seniors (70 to 84)	778	4.2	4.3	527	3.1	4.3	+251
Elderly aged (85 and over)	92	0.5	0.9	59	0.4	0.9	+33
Total population (URP)	18,654	100	100	16,775	100	100	+1,879

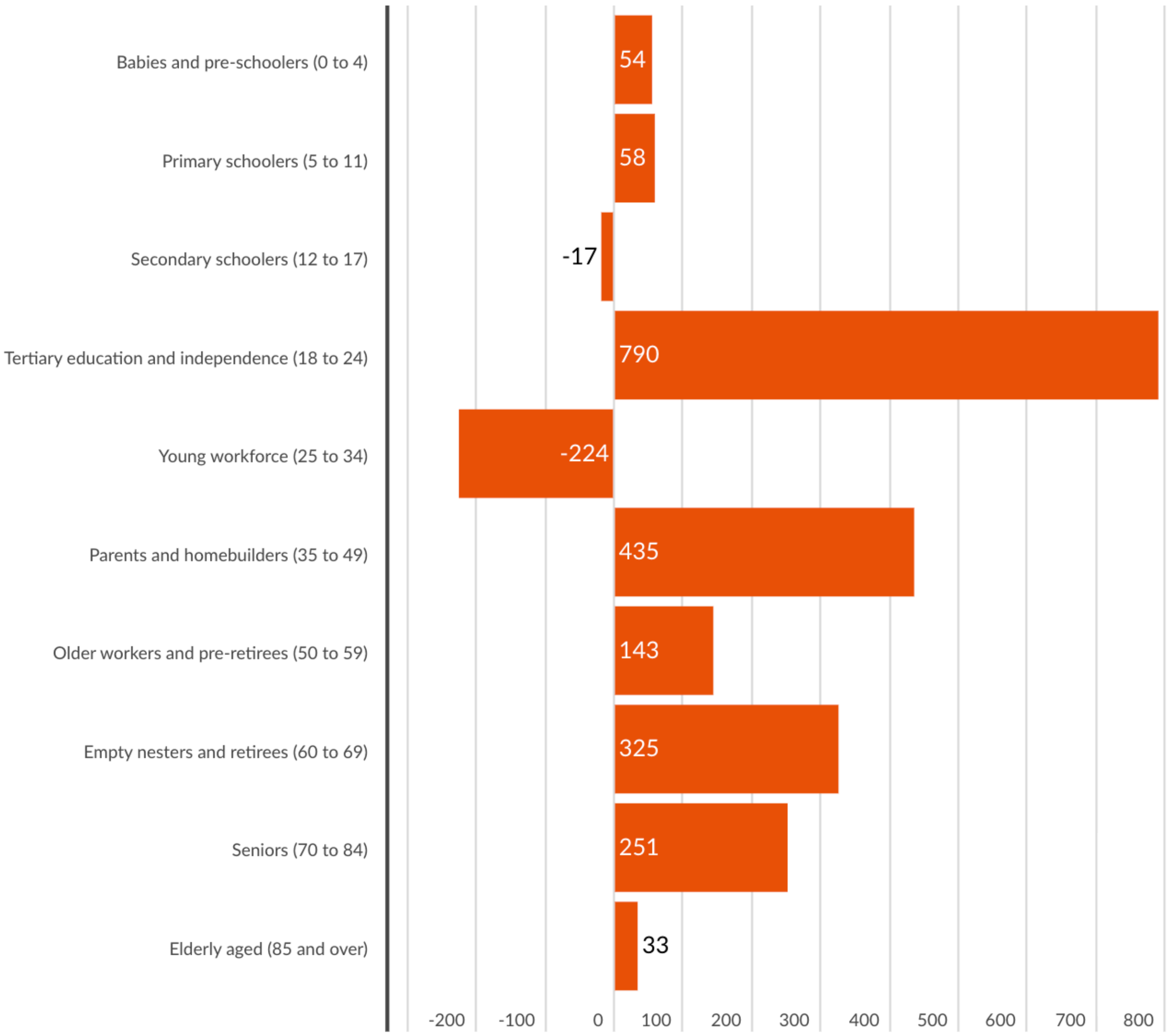


Figure 5 - Service age groups change by number change, Pyrmont Peninsula 2011-2016 (URP)

2.4. Cultural diversity, reported need for assistance and people who have moved address

Compared to the City of Sydney, the Pyrmont Peninsula is more culturally diverse, with a much higher proportion of people born overseas and speaking a language other than English at home, and a similar proportion of new migrants. The population is relatively mobile, with a higher proportion of people having moved address in the five years prior to the Census. The population has similar educational qualification levels and a similar proportion of people reporting a need for

Cultural diversity

Aboriginal and/or Torres Strait Islander population

In 2016, there were 163 Aboriginal and/or Torres Strait Islander people living within the Pyrmont Peninsula, an increase of 15 people (+10%) since 2011.

Aboriginal and/or Torres Strait Islanders represent 0.9% of the community, a slightly lower proportion compared to the LGA (1.2%) and Greater Sydney (1.5%).

Born overseas

The Pyrmont Peninsula population is culturally diverse with 56% of residents born overseas, a higher proportion compared to the LGA (48%) and Greater Sydney (37%).

The main country of birth is China (12%) followed by the United Kingdom, South Korea, India Thailand, New Zealand, Indonesia and Malaysia, as shown in Table 5.

Between 2011 and 2016, the proportion of residents born overseas increased from 51% to 56%.

Speaking a language other than English at home

46% of Pyrmont Peninsula residents speak a language other than English at home, much higher compared to the LGA (34%) and Greater Sydney (36%).

Residents speak over 40 different languages at home. While this data is not available at the SA1 level, the most common non-English languages spoken at home for the Harris Street Village area population (which aligns closely with that of the Pyrmont Peninsula) are Mandarin (13%) and Cantonese (5%), followed by Korean, Thai and Spanish, as shown in Table 5.

Between 2011 and 2016, the proportion of residents speaking a language other than English at home increased from 40% to 46%.

Recent arrivals to Australia between 2011-2016

45% of Pyrmont Peninsula residents were born overseas and arrived to Australia between 2011 and 2016, the same proportion compared to the LGA but much higher than Greater Sydney at 21%. These people intended to stay in Australia for at least one year (otherwise they are counted as overseas visitors).

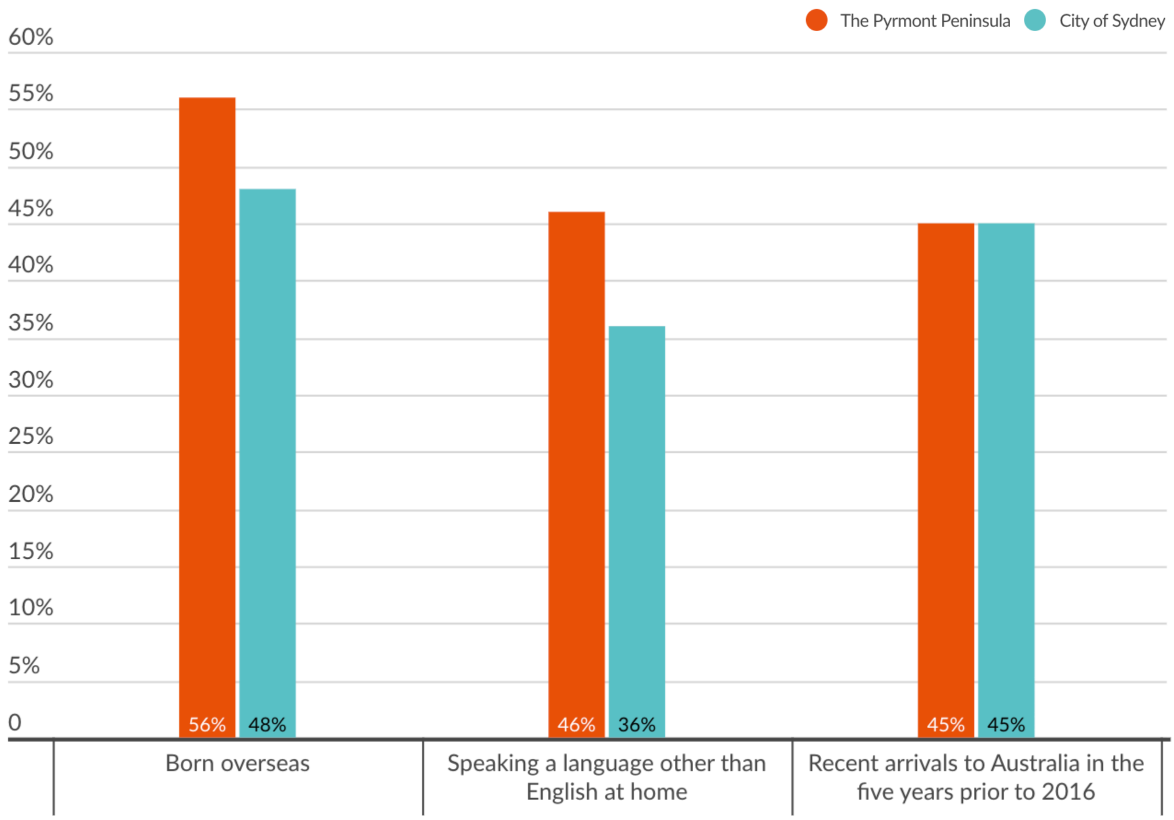


Figure 6 - Indicators of cultural diversity Pyrmont Peninsula compared to City of Sydney, 2016 (URP)

Table 5 - Indicators of cultural diversity Pyrmont Peninsula, 2011-2016 (URP)

	2016		2011		
Cultural diversity	Pyrmont Peninsula %	City of Sydney %	Pyrmont Peninsula %	City of Sydney %	Pyrmont Peninsula change diff. in %
Aboriginal and/or Torres Strait Islander	0.9	1.2	0.9	1.3	-
Overseas born total	56.3	47.7	50.9	42.4	5.5
Total speaking a language other than English at home	46.4	36.1	39.5	29.9	6.9
Recent arrivals to Australia in the five years prior to 2016	45	44.7	-	-	-
Top country(s) of birth (Harris Street Village)	Village %	City of Sydney %	Village %	City of Sydney %	Village change diff. in #
Australia	31.9	39.4	35	44	-
China (including Hong Kong)	12.4	9.7	9.8	5.4	+694
United Kingdom	4.8	5.3	5.4	5.7	-11
South Korea	4	1.7	2.8	1.7	+293
India	2.8	1.3	1.9	1.1	+192
Thailand	2.6	3.2	1.8	2.1	+182
Top languages spoken at home (<2%) (Harris Street Village)	Village %	City of Sydney %	Village %	City of Sydney %	Village change diff. in #
English only	42.5	51.5	46.5	57.1	-
Mandarin	12.8	9.9	9.1	5.1	+886
Cantonese	5.4	2.9	6.7	3.2	-100
Korean	3.6	1.6	2.6	1.6	+247
Thai	2.6	3.2	1.9	2.1	+170
Spanish	2.3	1.7	1.2	1.3	+232

Reported need for assistance

In 2016, 2% of the Pyrmont Peninsula population (310 people) reported a need for assistance in their day to day lives due to a 'profound or severe core activity limitation'. This is the same proportion as the LGA but lower compared to Greater Sydney (4.9%).

Note: this question relies on people evaluating themselves, (or their carers), as being in need of assistance, and cannot be relied upon to provide details as to the total number of people with a 'profound or severe core activity limitation'.

People who have moved address

Over half of the population in the Pyrmont Peninsula (61%) moved address in the five year period between 2011 and 2016, a higher proportion compared to the LGA (59%) and much higher compared to Greater Sydney (40%). This indicates a relatively mobile population.

2.5. Education, employment and income

Compared to the City of Sydney, the Pyrmont Peninsula is characterised by a similar proportion of residents attending university and TAFE, higher labour force participation and a slightly higher unemployment rate. The Peninsula has a higher median household income, with a lower proportion of low income households and a higher proportion of high income households. Volunteering in the Pyrmont Peninsula is slightly less prevalent.

Education institution attending

A cluster of education facilities either within the Pyrmont Peninsula (UTS and TAFE NSW) or within close proximity (The University of Sydney) mean that the Study Area area is home to many students.

In 2016, 14% of residents were attending University and 3% were attending TAFE, higher than the LGA and Greater Sydney at 6% and 2% respectively.

Qualifications

Residents of the Pyrmont Peninsula are highly qualified. 42% of residents have a university degree, the same proportion as the LGA but much higher than Greater Sydney at 28%.

An additional 6% of residents have a trade qualification, slightly lower compared to the LGA (7%). Just under a quarter of residents (24%) have no qualifications, slightly lower compared to the LGA at 25%.

Labour force participation

There is higher labour force participation within the Pyrmont Peninsula, with 66% of population aged 15 years and over either employed or actively looking for work, compared to 64% in the LGA and 62% in Greater Sydney.

Unemployment rate

In 2016, 7% of the Pyrmont Peninsula population aged over 15 years was unemployed and looking for work, a higher proportion compared to the LGA (6%) and Greater Sydney (6%).

Main industries of employment of residents

There is no information available about industries of employment based on SA1 boundaries for the Pyrmont Peninsula. However, the main industries that residents of the Harris Street Village were employed in in 2016 were:

- Professional, scientific and technical services (16%)
- Accomodation and food services (15.5%)
- Financial and insurance services (11.9%)
- Retail trade (7%)
- Health care and social assistance (6.1%), and
- Education and training (5.4%).

Compared to City of Sydney LGA, there was a higher proportion of residents employed in financial and insurance services (15.5% compared to 8.8%), and accommodation and food services (15.5% compared to 12.1%).

Household income

In 2016, the Harris Street Village area was characterised by a higher median weekly household income ($2,084) compared to the LGA ($1,915) and Greater Sydney ($1,745).

The Pyrmont Peninsula has a lower proportion of low income households earning less than $600 a week (14%) and a higher proportion of high income households earning more than $2,500 a week (35%), compared to 18% and 32% respectively in the LGA.

Volunteering

14% of residents in the Pyrmont Peninsula aged over 15 years provided voluntary work in 2016, lower compared to the LGA (16%) and Greater Sydney (17%).

2.6. Household characteristics, housing density and tenure

Compared to the City of Sydney LGA, the Pyrmont Peninsula is characterised by a much higher proportion of high density dwellings and a higher household size, with a much lower proportion of 'lone person' households and a similar housing tenure profile. While a much higher proportion of residents travel to work by foot, there is also a high car ownership rate in the Pyrmont Peninsula concentrated mostly in the north of the area and lower proportions of residents traveling to work by public transport.

Average household size

The Pyrmont Peninsula is characterised by a slightly larger average household size (2.15 persons per household) compared to the LGA (1.97 persons per household). This corresponds to the much lower proportion of lone person households as discussed below.

Household composition

As shown in Figure 7, the Pyrmont Peninsula is characterised by a lower proportion of 'lone person' households compared to the LGA however higher than Greater Sydney, and a higher proportion of 'couples without children', 'couples with children' and 'group' households.

Couples without children (28% of households)

The most common household type within the Pyrmont Peninsula is couples without children (28% of all households), which represents a higher proportion compared to the LGA (26%) but lower compared to Greater Sydney (22%).

Lone person households (26% of households)

The Pyrmont Peninsula has a lower proportion of lone person households (26%) compared to the LGA (33%) but higher than Greater Sydney (22%). However, lone person households are still the second most common household type within the Pyrmont Peninsula.

Group households (15% of households)

15% of households in the Pyrmont Peninsula are group households, a higher proportion compared to the LGA (14%) and significantly higher than Greater Sydney (5%). This household type saw the largest growth between 2011 and 2016 with an increase of 260 households or 27%.

Couples with children (13% of households)

Couples with children represent 13% of all households in the Pyrmont Peninsula, a higher proportion compared to the LGA (10%) but much lower compared to Greater Sydney (35%).

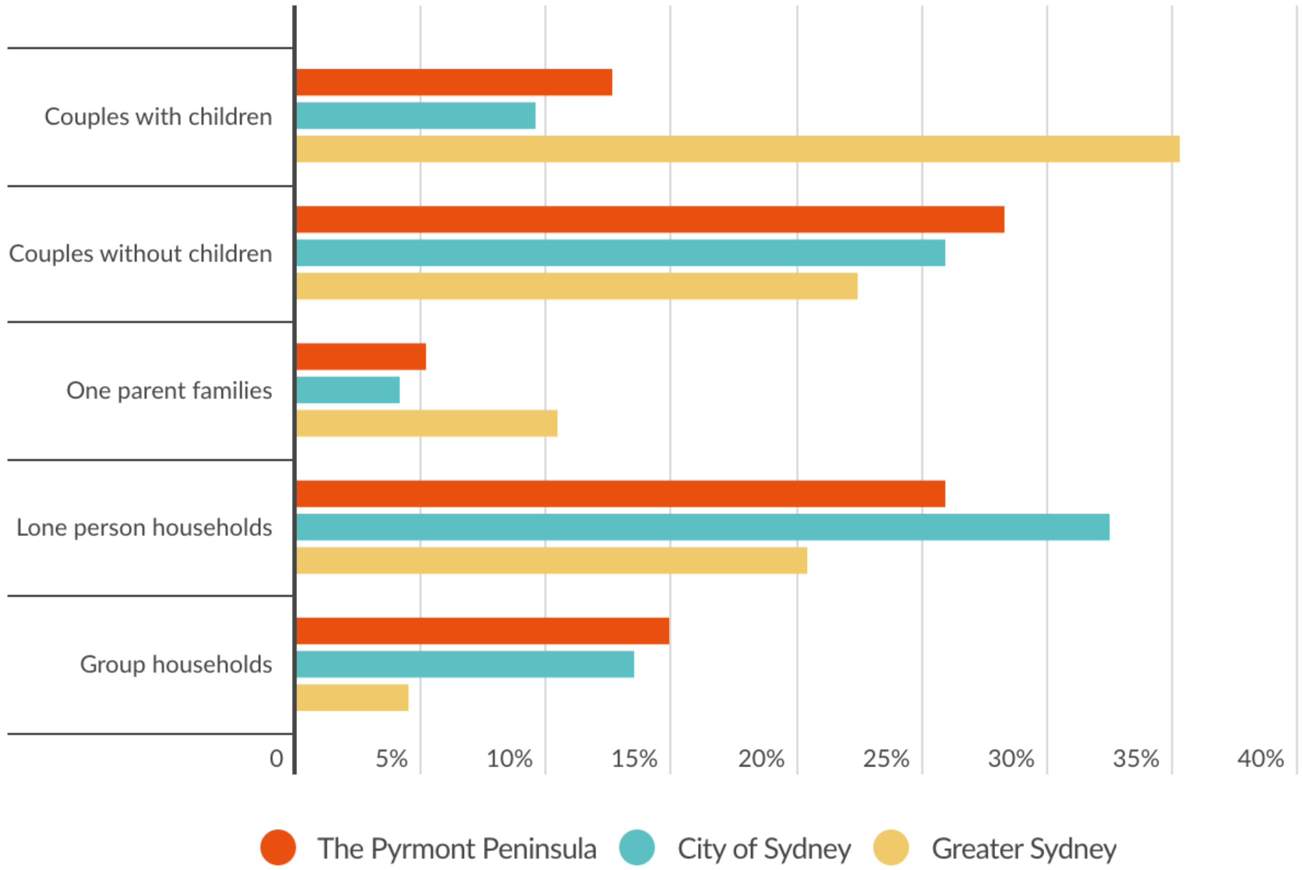


Figure 7 - Household composition Pyrmont Peninsula compared to City of Sydney and Greater Sydney, 2016

Housing density

The vast majority of residents in the Pyrmont Peninsula live in high density dwellings (90%), much higher compared to the LGA (75%) and Greater Sydney 23.5%). Between 2011 and 2016, the proportion of the population living in high density increased from 87% to 90%. High density housing is defined as high density dwellings which includes flats in 3 or more storey blocks.

Housing tenure

As shown in Figure 9, in 2016, nearly half (47%) of the Pyrmont Peninsula households were renting privately, the same proportion as in the LGA yet significantly higher than Greater Sydney (28%). This is typically a sign of relatively mobile residents.

Overall, the housing tenure profile of the Pyrmont Peninsula is similar to that of the LGA with a slightly higher proportion of homeowners (15% compared to 13%).

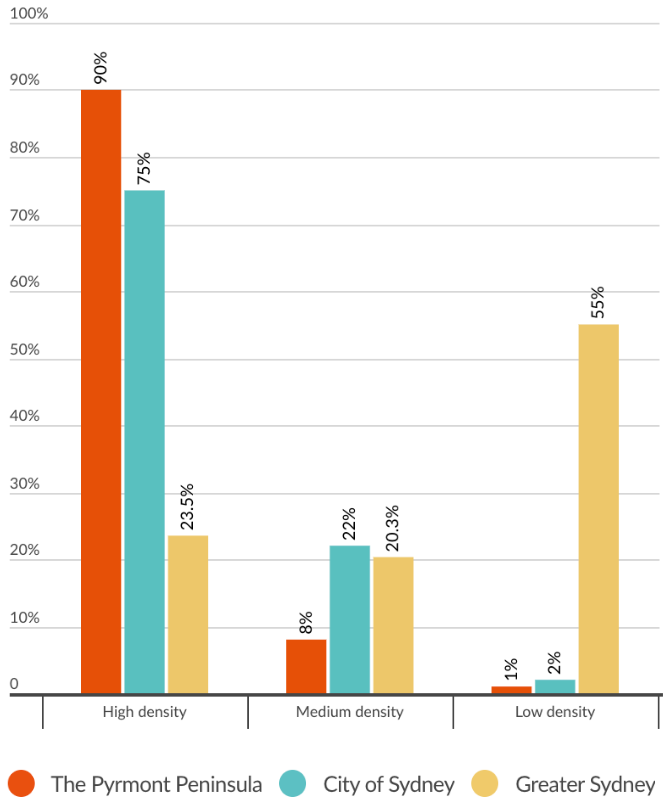


Figure 8 - Dwelling density Pyrmont Peninsula compared to City of Sydney and Greater Sydney, 2016 (URP)

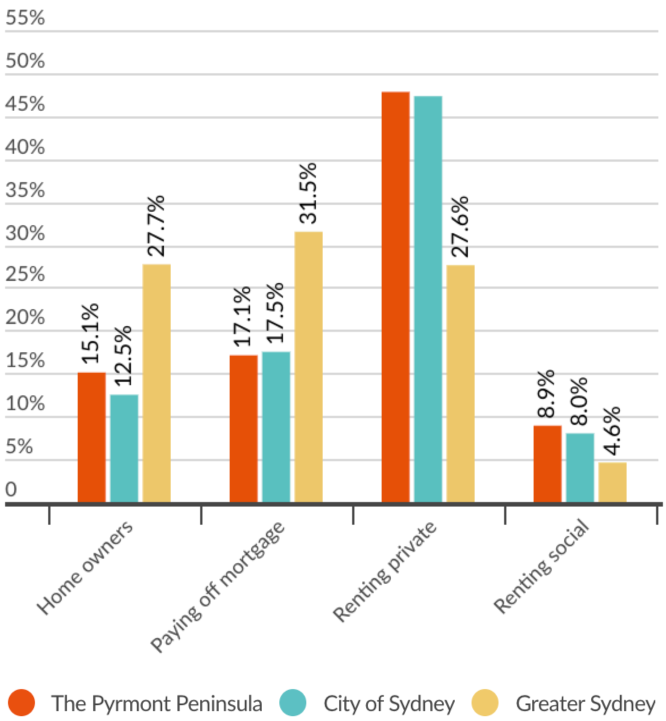


Figure 9 - Housing tenure Pyrmont Peninsula compared to City of Sydney and Greater Sydney, 2016 (URP)

Internet connection at home

Information technology is increasingly an important part of the way people work, conduct their finances, communicate, learn and are entertained. As a result, high speed internet connections are increasingly regarded as a necessity for accessing essential services and information. Internet connectivity can be affected by availability and affordability of connection services, household income, education and resident ages.

In 2016, 82% of households in the Pyrmont Peninsula had an internet connection, slightly higher than the LGA at 78% and Greater Sydney at 81%.

Mode of travel to work

As shown in Figure 10, in 2016, the majority of the Pyrmont Peninsula's population walked to work (38%), significantly higher compared to the LGA (24%) and Greater Sydney (4%).

Correspondingly, a much lower proportion of residents in the Pyrmont Peninsula travel to work by public transport (22%) compared to 35% in the LGA (however comparable to Greater Sydney at 22%). An additional 22% travel to work by car and 2% cycle to work.

Vehicle ownership

In 2016, 44% of households owned 1 car, higher compared to the LGA at 38%. Car ownership is concentrated in the north of the area in the Pyrmont Point sub-precinct, with much lower car ownership in the south in Ultimo.

Correspondingly, 31% of Study Area residents did not own a car, lower compared to 35% in the LGA.

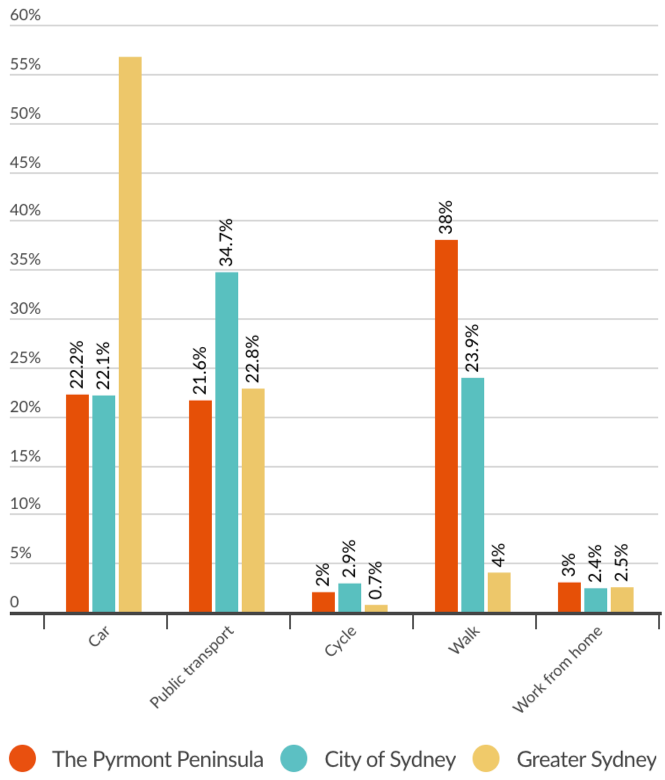


Figure 10 - Mode of travel to work Pyrmont Peninsula compared to City of Sydney and Greater Sydney, 2016 (URP)

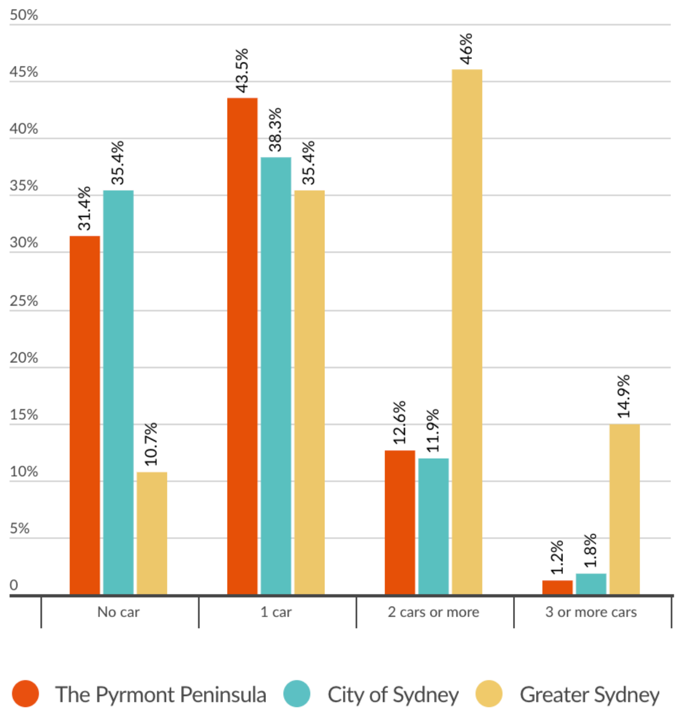


Figure 11 - Car ownership Pyrmont Peninsula compared to City of Sydney and Greater Sydney, 2016 (URP)

2.7. Demographic differences across suburbs

There are unique demographic differences across the suburbs within the Pyrmont Peninsula that can inform place based planning and infrastructure and service needs.

These differences are shown in Table 6 on page 19 and Figure 12 on page 20 (percentages have been rounded to the nearest whole number). Overall:

- Ultimo is defined by a significantly younger median age (26), a higher household size (2.26); a significantly higher proportion of people attending university 37%); a higher proportion of households without a car (49%); higher group households (23%); signficantly higher proportions of resident born overseas (70%) and having moved address in the past 5 years (72%); and signficantly lower median household income ($1,197).
- Pyrmont is defined by a higher proportion of residents aged under 18 years (10%) and higher couple with children households (14%); higher proportions of residents over 60 years (9%); higher median weekely household incomes ($2,273); lower proportions of households without a car; and lower proportions of resdients attending university (6%).
- The part of Darling Harbour located within the Pyrmont Peninsula boundaries has very similar demographic profile to Pyrmont and the City of Sydney LGA.

Table 6 - Demographic differences across Pyrmont Peninsula suburbs (source: social.atlas, URP)

Demographic indicator (2016)	Ultimo	Pyrmont	Darling Harbour (part)	Pyrmont Peninsula	City of Sydney	Greater Sydney
Age characteristics						
Median age	26	34	36	31	32	36
Aged under 18 years	5%	10%	4%	9%	10%	22%
Aged 60 years and over	4%	9%	9%	7%	8%	19%
Tertiary and independence (18 to 24 years)	38%	11%	11%	17%	10%	10%
Cultural diversity						
Born overseas	70%	53%	31%	56%	48%	37%
Income						
Median household income	$1,197	$2,273	NA	$2,136	$1,915	$1,749
Proportion of low-income households	26%	10%	3.9%	14%	18%	15%
Housing						
Density	159 pp/ha	148 pp/ha	39 pp/ha	132 pp/ha	84 pp/ha	3.90 pp/ha
Rents private housing	52%	48%	53%	47%	47%	28%
Moved address in past 5 years	72%	58%	62%	61%	59%	40%
Household characteristics						
Average household size	2.26	2.12	2	2.15	1.37	2.72
Lone person household	26%	26%	16%	26%	33%	20%
Couple no children household	20%	30.5%	0	28%	26%	22%
Couples with children	8%	14%	15%	13%	10%	36%
Group household	23%	13%	14%	15%	14%	5%
Education						
Attending university	37%	6%	4%	14%	13%	6%
University qualifications	42%	47%	45%	42%	44%	28%
Transport characterstics						
Households without a car	49%	27%	23.7%	31%	35%	11%
Walk to work	36%	37%	28%	38%	24%	4%
Cycle to work	1.5%	2%	0%	2%	2.9%	1%
Travels to work by public transport	32%	21%	17%	22%	35%	23%

Larger circles represents the most significant demographic indicator

	Ultimo	Pyrmont	Darling harbour (part)	Pyrmont Peninsula (overall)	City of Sydney	Greater Sydney
Median household size	2.26	2.12	2	2.15	1.97	2.72
Low income household	26%	10%	4%	14%	19%	15.1%
Moved address in last 5 years	72%	58%	62%	61%	59%	40.3%
Median age	26	34	36	31	32	36
Aged under 18 years	5%	10%	4%	8.5%	9.6%	22.2%
Born overseas	70%	53%	31%	56%	48%	36.7%
Group households	23%	13%	14%	15%	13.5%	4.5%
Attending university	37%	6%	4%	14%	13%	6.1%
Households without a car	49%	27%	24%	31%	35%	10.7%

Figure 12 - Demographic differences across suburbs within the Pyrmont Peninsula

2.8. Worker and visitor profile

Workers and businesses

The following data is sourced from Pyrmont Precinct Floor Space and Employment Survey, 2017 (FES), a report prepared by the City of Sydney. The survey is a census of buildings in the City of Sydney LGA that is undertaken by the Urban Analytics team every 5 years.

Key worker and business data for the Pyrmont Peninsula

- Businesses: According to the FES, there were 1,297 businesses located in the Pyrmont Peninsula in 2017, a 9.5% increase since 2012.
- Employment: There were 36,919 workers, working in the Pyrmont Peninsula in 2017, a 20.3% increase since 2012.
- Internal floor area: There was approximately 3.4 million square metres of internal floor space in 2017, an increase of around 14% since 2012.
- The City-based Industry with the largest proportion of workers was Creative Industries, with approximately 18% of total workers in the Pyrmont Peninsula. This differs from the City of Sydney LGA, in which Finance and Financial Services is the major employer of workers.
- The business mix in the Pyrmont Peninsula is weighted to Food and Drink, Professional and Business Services, Retail and Personal Services, Creative Industries and Information Communications Technology (ICT). This mix has remained consistent since 2012. This mix is similar to that of the City of Sydney LGA, however the Pyrmont Peninsula is more heavily weighted to Food and Drink businesses.

Workforce

- According to the FES, in the five year period from 2012 to 2017 there was a net increase in total workers within the Pyrmont Peninsula, with an additional 6,241 workers surveyed in 2017 (20.3% increase).
- Much of this growth occurred in the Professional Services, ICT, Higher Education and Research industries.
- Between 2012 and 2017 there were decreases in worker numbers in Food and Drink (-495 workers, -15.7% decrease), Finance and Financial Services (-334 workers, -39.4% decrease) and Transport and Logistics (-135 workers, -27.3% decrease).
- In 2017 the top 5 City-based Industries by total businesses were:
  - Creative Industries (6,741 workers, 18.3% of total employment)
  - Higher Education and Research (6,490 workers, 17.6% of total employment)
  - ICT (6,323 workers, 17.1% of total employment).
  - Tourist Cultural and Leisure (5,736 workers, 15.5% of total employment), and
  - Professional and Business Services (5,324 workers, 14.4% of total employment).

Visitor profile

The City of Sydney is Greater Sydney's premier metropolitan core that contains regional and village level services including retail to health, education to entertainment. The Sydney CBD and surrounds (including the Pyrmont Peninsula) are attractive places for tourists to visit, explore and stay overnight. Within and in close proximity to the Pyrmont Peninsula, there are number of tertiary education institutions resulting in a large number of student day visitors (in addition to the large number of students who also live in the Pyrmont Peninsula, mostly in Ultimo suburb and in student housing).

According to the City of Sydney Baseline Infrastructure Assessment Study (2019) the City of Sydney experiences 680,000 daily and overnight visitors for range of purposes and services including:

- Shopping
- Health and education
- Recreation and entertainment
- Accommodation
- Personal business, and
- Work related business.

This data is not available at the level of the Pyrmont Peninsula.

Accommodation is provided throughout the LGA via short term rental accommodation as well as through traditional hotel and hostel services. Within the Pyrmont Peninsula there was the following short term rental accommodation in 2017 (based on information provided by the City of Sydney):

- 2,391 hotel rooms
- 853 serviced apartments
- 12 backpacker beds, and
- 1,256 student accommodation rooms.

2.9. The Pyrmont Peninsula's temporal populations and their impacts

The Pyrmont Peninsula is a diverse and mixed use area with locally, regionally and metropolitan significant places and spaces that attract a range of day, overnight and short term workers and visitors. This means that at different times of the week and year, there are changing number of people moving around, visiting, socialising and recreating here. The temporal nature of the population includes:

- Approximately 37,000 workers in the area, mostly working weekdays in creative industries, higher education, ICT, and professional business services; while others working nights and weekends in tourism, culture, leisure and entertainment industries. These workers will add demand for access to open space and recreation facilities before and after work and at lunch times; require quality local spaces for breaks and for flexible work; active transport connections; good public transports connections; and access to retail, food services and entertainment before and after work.
- Thousands of students, in addition to the around 3,000 who live in the Pyrmont Peninsula, visit each day and access parks, recreation facilities (including courts and leisure centres), and community facilities such as libraries.
- Tourists, including those staying in the more than 3,200 hotel rooms/serviced apartments, seek to visit local parks, museums/galleries and other cultural facilites, and may use local active transport routes and public transport, and access retail, entertainment and food services.
- Transient populations, including the 72% of residents who live in Ultimo (most likely students) who have moved at least once in the past 5 years.

Impacts

- Higher demand weekdays (particularly before work and at lunchtime) for use of parks, indoor leisure centres and recreation facilities; increased use of active transport routes and access to public transport.
- Higher demand during university term for libraries and parks, leisure centres and recreation facilities.
- Higher use of footpaths and active transport links; public transport and parking impacts during tourist season, including from tourist coaches.

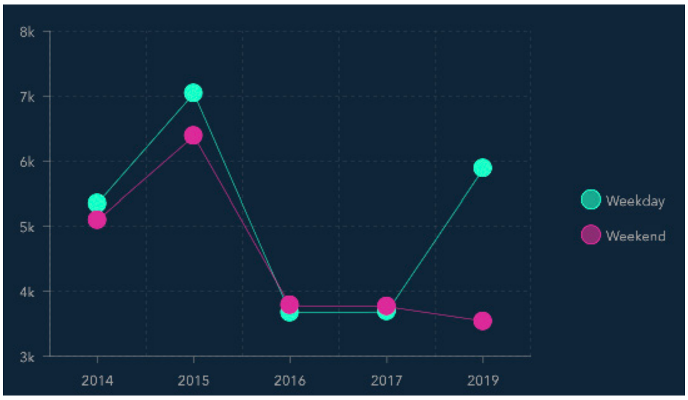
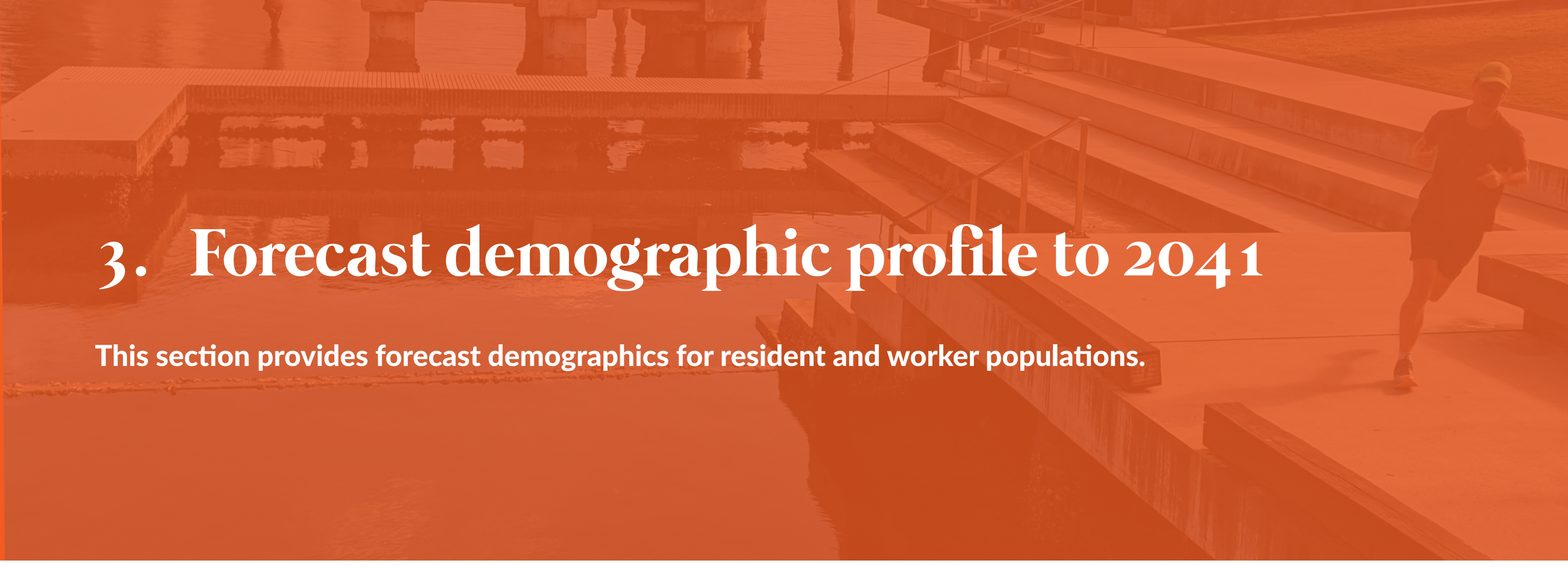


Figure 13 - Pedestrian count in the Pyrmont Peninsula during Autumn. (Source: City of Sydney experience.arcgis.com)

Figure 14 - Pedestrian count in Pyrmont Peninsula during Spring. (Source: City of Sydney experience.arcgis.com)

The City of Sydney captures data including pedestrian counts at different times of the week (e.g. weekdays and weekends) and seasons of the year. The two figures above (Figure 13, Figure 14) indicate the number of people walking through the Pyrmont Peninsula at different times and illustrates that the Pyrmont Peninsula is most used in spring and during weekdays, most likely due to the presence of workers and students during the day, and increasing tourists during spring. This number steeply drops in the weekends when used primarily by residents and visitors. A similar pedestrian pattern is visible in autumn, however the number of people using the space decreases by 2,000.

This indicates that the public spaces and infrastructure in the Pyrmont Peninsula should be planned and designed to cater to the changing numbers and needs of the various user groups in different seasons, weekdays and weekends. It also presents an opportunity to program spaces differently at various times therefore paving the way in designing a flexible and multi-purpose public realm.



3. Forecast demographic profile to 2041

This section provides forecast demographics for resident and worker populations.

3.1. Forecast growth

The forecast population for the Pyrmont Peninsula is based on scenario modelling by Hassell, the Department's main series population forecasts, and the Economic Development Strategy (PWC, July 2020). It assumes the inclusion of a metro station within the Pyrmont Peninsula. The NSW Government is continuing to investigate the feasibility of building a metro station in Pyrmont. This includes further industry engagement and transport and economic modelling to assess its feasibility and affordability.

Resident population growth

An additional 3,991 dwellings equating to 8,500 residents are forecast to 2041 based on a household size of 2.13 person per household.

Table 7 - Forecast resident population growth scenario 1 (source: Hassell based on the department main series population projections to 2041)

Year	Population	Change
2021	20,500	
2041	29,000	+8,500

Employment growth

An additional 23,000 jobs are forecast across the Pyrmont Peninsula by 2041. Forecasts are based on the Economic Development Strategy (PWC, July 2020).

Table 8 - Forecast job growth scenario 1 (source: EDS, PWC July 2020)

Year	Jobs	Change
2021	37,000	
2041	60,000	+23,000

Forecast growth by sub-precinct

Table 9 presents forecast resident and employment growth by sub-precinct. It shows that the areas forecast to support the largest residential growth is Ultimo, Blackwattle Bay and Tumbalong Park. The areas forecast to support the largest employment growth include Ultimo, Blackwattle Bay, Tumbalong and Darling Island.

Table 9 - Forecast growth 2021 - 2041 by sub-precinct

Sub-precinct	Forecast resident growth (2021 - 2041)	Forecast job growth (2021 - 2041)
Pirrama	+190	+350
Pyrmont Village	+135	+1,380
Darling Island	+600	+2,730
Blackwattle Bay	+2,055	+5,770
Tumbalong Park	+2,055	+2,870
Wentworth Park	+1,115	+1,200
Ultimo	+2,350	+8,700
Total growth	**+8,500**	**+23,000**

3.2. Summary of growth by sub-precinct

Figure 20 below illustrates a summary of potential residential and job growth by sub-precinct to 2041 and shows the most significant growth potential is in the Blackwattle Bay, Ultimo and Tumbalong Park sub-precincts.

Figure 15 - Forecast residential and job growth by sub-precinct