

Planning Proposal TG Millner Field, Marsfield

Economic benefits report

Prepared for:
Eastwood Rugby Club
North Ryde RSL
Winston Langley

5 May 2022



Deep End Services

Deep End Services is an economic research and property consulting firm based in Melbourne. It provides a range of services to local and international retailers, property owners and developers including due diligence and market scoping studies, store benchmarking and network planning, site analysis and sales forecasting, market assessments for a variety of land uses, and highest and best use studies.

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This report should be read in its entirety, as reference to part only may be misleading.

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1

Introduction

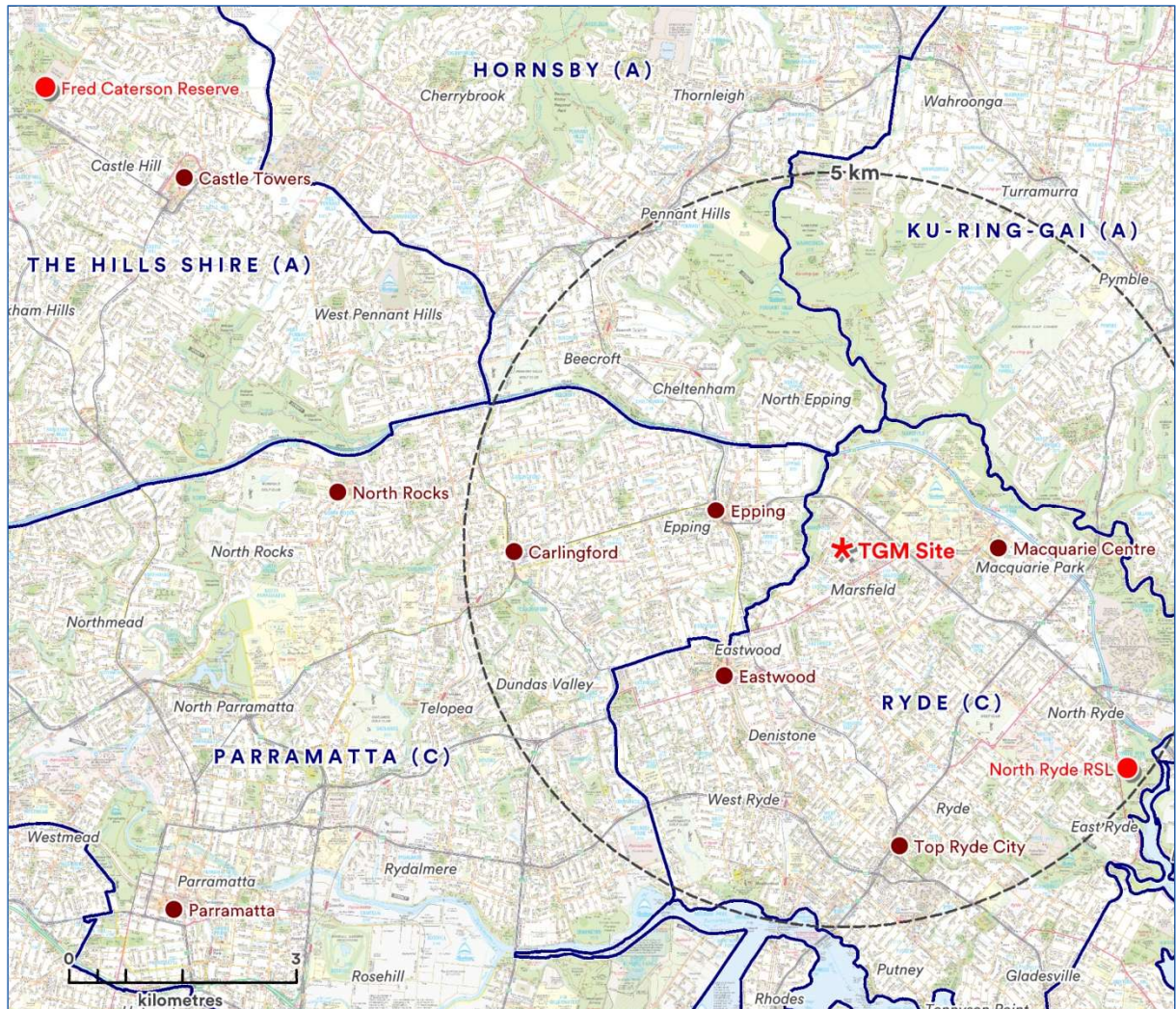
A Planning Proposal has been developed for the 6.2 hectares of land at 146 Vimiera Road, Marsfield – also known as TG Millner Field. TG Millner Field is the long-term playing and social base of the Eastwood Rugby Club (ERC). TG Millner Field has been leased and managed by North Ryde RSL (NRRSL) since 2000 and owned by NRRSL since 2017.

The ageing condition of the playing and spectator facilities with constraints on further development, a lack of revenue options under the current ground occupancy agreement and the changing local demographic and player and supporter base has forced ERC to seek a new home at Castle Hill, where a new playing base will be developed at Fred Caterson Reserve.

With the loss of ERC as the ground tenant, limited use of the ground facilities by other groups from the City of Ryde and the high management and maintenance costs of TG Millner Field draining NRRSL finances, a Planning Proposal has been developed by ERC, NRRSL and Winston Langley to redevelop the site for low density housing. The Planning Proposal includes allocating 5% of the proposed lots to affordable housing and dedicating approximately 10,000 sqm of land or approximately 16% of the site to the City of Ryde for public open space.

This report sets out the background to the Planning Proposal, the changing demographic profile of the traditional support base in the surrounding suburbs and the economic benefits of the change in land use to the community.

Figure 1—Regional location



Source: Deep End Services

2

Background

2.1 TG Millner Field

TG Millner Field is a private recreation ground of 6.2 hectares owned, since 2017, by the North Ryde RSL. It has been the home playing field and social base of the Eastwood Rugby Club since 1958.

TG Millner Field lies in the residential neighbourhood of Marsfield in the City of Ryde. It is situated on Vimiera Road, a 2-lane local collector road which extends across the northern residential areas of Marsfield and Epping. Traffic levels on Vimiera Road are light as Terrys Creek to the west severs the local street network between Marsfield and Epping and the parallel-running Balaclava Road to the south-east is the main route for local and through traffic between Epping Road and Blaxland Road.

Current improvements on the site consist of:

- #1 playing field, the NRRSL-run licensed club facility with outdoor seating on the east side and the main stand on the west side built in 1967.
- #2 playing field at the rear used on an occasional basis.
- #3 playing field at the rear which has been inactive for many years.
- A childcare centre leased to private operators.

The site has a single entry and exit point to Vimiera Road with a small area of formal parking beside and around the clubrooms. Overflow parking on game day is along the entry road and on the #3 playing field. Parking is restricted on Vimiera Road and the local streets due to the narrow carriageway and Council-imposed limits on game days.

TG Millner Field has a residential interface of detached homes on its three directly abutting boundaries and across Vimiera Road to the west.

While the once rural land was originally conceived as a convenient site for the establishment of the club, it has increasingly become a marginal location for a major playing field and club facilities due to:

- The encroachment over time of housing around the site which is incompatible with use of the complex for after-hours training and playing under lights and the operations of a social club.
- A lack of convenient public transport for the main supporter base.
- Access and restricted parking on the narrow 2-lane Vimiera Road.
- Limited on-site formal parking.
- The absence of close commercial or community infrastructure.
- The shifting demographic profile of the area.

The playing and spectator facilities have seen little change since the early 1990's and have been assessed as being well below current Australian standards for major sporting fields including ground lighting which cannot be upgraded due to the residential interface and Council opposition.

As a private recreation facility, the general public has no right-of-access to TG Millner Field. The Vimiera Road frontage is secured by a 2.5 metre cyclone wire fence with the driveway gates often locked on weekends restricting access to the site.

The main field has continued to serve as the site of senior and competitive matches, and the two secondary fields are utilised for training and parking, respectively. In the early 2000s, the RSL developed a childcare centre on the northern boundary adjacent to the former bowling green.

Figure 2—Local context



Figure 3—TG Millner Field



Source: Nearmap

2.2 Eastwood Rugby Club

The Eastwood District Rugby Union Football Club was formed in 1947 from the amalgamation of the Eastwood and Epping Clubs. It has played in the Sydney District Competition since its inception, winning six Shute Shield titles between 1999 and 2015. The club initially played at Epping but moved its home ground to TG Millner Field in 1963 after 4 acres of rural land were purchased in 1958 through a loan provided by Colonel Tom Millner.

In the following decades, additional land was purchased for the two top ovals and as the club prospered it developed the grandstand, Licensed Club facilities and ground lighting.

The club serves a broad district extending from the Parramatta River at Meadowbank to the Hawkesbury River at Wisemans Ferry, from where a number of junior clubs have an affiliation with and development path through to ERC.

From about the early 1990s, the Licensed Club (a separate entity charged with generating funds for the maintenance of the ground and the Football Club) faced severe financial difficulties due to falling attendances, the changing demographics of the area, competition from Super Rugby, and a redevelopment of the licensed club rooms in 1993 secured by a mortgage over the field to Westpac which ultimately failed to attract new members.

The Licensed Club's poor financial position has, in turn, affected the ability of Vimiera Recreation Ground Limited (VRG) – a separate entity who owned and managed the ground – to effectively maintain the ground and club facilities.

In 1999, faced with potential foreclosure, the Licensed Club members and VRG shareholders granted a long-term lease with options over the TG Millner complex to NRRSL in exchange for NRRSL paying the club's debts and a commitment to maintain TG Millner Field.

The deal left ERC with limited sources of revenue, as ticketing and catering rights were relinquished to NRRSL. ERC members became NRRSL members and the ability of ERC to secure traditional sources of sponsorship was limited given the nature of the relationship with NRRSL.

Faced with ongoing financial problems, limited means of generating new revenue under the terms of the lease, and the ongoing changes to the demographics of the area, TG Millner Field was sold to NRRSL in October 2017.

In about 2016, when ERC first entered discussions with NRRSL regarding the sale of TG Millner Field, the ARU and NSW RU were reviewing the future of Premier Rugby and, in the case of NSW RU, developing a Western Sydney Strategy. The ARU review revealed that ERC was falling further behind other clubs on a range of operating and financial metrics while the NSW RU's Western Sydney Strategy recommended ERC relocate its playing base to Castle Hill.

ERC also faced other challenges including:

- Long term changes in the social and demographic composition of the area where rugby was no longer a sport widely played in local schools and had declining participation in local junior clubs. ERC had identified this trend as early as 1990.

- A shifting player and supporter base away from the area to the burgeoning north-west suburbs of The Hills.
- An obligation on ERC to develop and grow the game across its wide district where Castle Hill was more central and accessible with a natural and growing population base that follow the code.

With little or no financial support likely to come from the code administrators, ERC had to manage its own destiny.

After many years of engagement, ERC entered into an agreement with Hills Council in 2017 to create a new playing base and Centre of Excellence at Fred Caterson Reserve in Castle Hill. The relocation will move ERC closer to its catchment area, gain access to new revenue streams and enable it to better develop rugby in a demographic area more naturally inclined to play and follow the code.

ERC will retain its history and identity as 'Eastwood Rugby' and 'The Woodies' at its new Castle Hill base. It will do this within a growing rugby catchment and at an appropriate location for rugby to be played with no impact on neighbouring residents.

2.3 North Ryde RSL

The North Ryde RSL Sub-Branch was formed in 1958 by 25 members. The site of the current premises on Magdala Road was granted to the branch in the same year by Ryde Council.

From its inception, club membership grew quickly with the rapid suburbanisation of Ryde including the one of Australia's largest War Service Home Schemes at North Ryde.

The club has progressively grown its membership and premises to become the large integrated service and hospitality complex it is today with over 25,000 members. About two-thirds of the membership are understood to reside in the City of Ryde.

NRRSL has an on-site Chinese restaurant and family-friendly buffet, kids club and offers a range of intra-club activities including baseball, bowls, cricket, fishing, golf, indoor sports, netball, senior citizens and widows club.

Notwithstanding its past growth and important community role, NRRSL has its own challenges in maintaining services and relevance to its members and faces the same structural problems as ERC relating to the changing demographics of the area.

NRRSL has supported the continued operation of a registered Club at TG Millner Field since 2000. Over this period, NRRSL has subsidised the operation of the Licensed Club and maintenance of the fields, expending significant funds to the point where NRRSL's investment in TG Millner Field has become a critical drain on the club's finances.

Given the significant capital required to invest in the Licensed Club and with little prospect of increased patronage from the local area, NRRSL has entered into an arrangement with ERC/VRG to jointly pursue the redevelopment of the TG Millner site to secure the future of these longstanding community organisations.

The successful redevelopment of the TG Millner Site will enable NRRSL to further invest in its existing premises at North Ryde and play a key role in the Ryde community for years to come.

2.4 Ground use

NRRSL records for the calendar 2018-2020 years show that TG Millner Field has a low level of utilisation for a large private recreation asset. As noted earlier, only two of the three playing fields are in active use and just three sports used the complex – rugby union, rugby league and touch football.

In the three-year period only two sporting clubs used the complex on a regular basis. These were:

- Eastwood Rugby, including its junior teams who used the #1 and #2 ovals on 72 occasions or the equivalent of once every two weeks.
- North Sydney Rugby League (located outside the City of Ryde) on a lesser frequency.

Ten local clubs from within the City of Ryde used TG Millner Field on just 58 occasions over three years – or on average 19 times per year or once every 2-3 weeks. Of these, the Ryde-Eastwood Hawks Rugby League Club used the grounds 29 times (or 10 times per year). All other local groups were infrequent users recording between 1 and 7 bookings per group over three years.

2.5 Conclusions

Despite the best efforts of ERC, NRRSL and their respective members, the local demographic changes initially identified by ERC in 1990 have now culminated in a situation where TG Millner Field is no longer relevant to the local community and requires regeneration to meet the needs of existing and future communities.

It has become clear that the successful relocation of ERC to Castle Hill (where it must still invest in ground facilities) and resolving the financial imposition on NRRSL of TG Millner Field's maintenance are linked to a new future and change of land use for the site.

3

Planning Proposal

3.1 Planning context

TG Millner Field is zoned RE2 Private Recreation under the Ryde Local Environmental Plan 2014 (LEP) which permits a limited range of uses including ‘registered clubs’.

Under the zone, the State Environmental Planning Policy (Housing) 2021 (SEPP) permits the development of the site for seniors’ living where “the land is being used for the purposes of an existing registered club”.

Notwithstanding the potential land use opportunity enabled by the SEPP, NRRSL and ERC hold the view that a site-specific Planning Proposal will deliver a better design outcome and superior public benefits than a highly specialised land use, for which there may be limited need or demand.

NRRSL and ERC also believe that a site of this size and nature is consistent with sites that the NSW Government Planning Proposal process was designed to address. With the announced relocation of ERC to Castle Hill and little or no demand from sporting or other tenants to occupy and support the costly maintenance of the TG Millner site, it is clear that the present private recreation land use can no longer continue and needs to be regenerated through a change of use that delivers community benefits through public open space and other outcomes.

3.2 Options

Given the local setting and the underlying value of the land, a residential scheme is the only practical and viable land use option for the site. In developing a vision for the site, a range of residential schemes were considered including:

- 500+ medium density apartments
- Seniors living units
- Low density homes and terraces

3.3 Preferred scheme

In arriving at a preferred scheme, the following principles were set down for the site:

- To achieve an average FSR no greater than 0.5:1. This is consistent with the prevailing FSR of the surrounding residential area developed through the 1970s.
- 5% of new lots on the site to be provided as affordable housing.
- A minimum 15% of the privately owned site to be dedicated to the community as public open space for either recreation, park purposes or other use determined by Council and the community.

After consideration of the various options, NRRSL and ERC settled on the low-density housing and terrace scheme as being appropriate for the site and compatible with the surrounding area. The Site Plan is shown in Figure 4.

Figure 4— Site Plan



Source: DKO Architecture

The features of the Site Plan are:

- A simple and efficient rectilinear subdivision with front-loaded home sites on a new internal loop road backing onto the three residential interfaces. Two internal blocks are laid out with smaller rear-loaded dwellings serviced by intra-block laneways.

- A yield across the 6.2-hectare site of 132 home sites at an average FSR of less than 0.5:1. Lots generally range in area between 190 sqm and 400 sqm with a small number exceeding 400 sqm.
- Two road connections to Vimiera Road.
- Approximately 9,600 sqm of multi-purpose open space comprising part of the playing surface and boundary area of the #1 playing field through to Vimiera Road and part of the northern spectator hill. The open space extends across the loop road entry to the northern boundary of the site. In effect, a large area of the existing private recreation land along Vimiera Road is retained and enhanced for public use while the little-used and obscured areas at the rear of the site are developed for low density housing. In the southern corner, a pocket park of 492 sqm provides a connection to Thema Street. In total, approximately 10,000 sqm or 16% of the site area is dedicated to open space.

The scale of development is compatible with the surrounding housing density and character and is, in fact, much lower than typically found on other infill sites across the middle suburbs of Sydney.

The concept is informed by the highly awarded Putney Hill development of the former Ryde Rehabilitation Hospital site at Ryde. The larger Putney Hill development by Frasers has 668 apartments in buildings up to 7 levels and 123 low density residences similar in style and character to the Site Plan.

Figure 5—Putney Hill Ryde



4

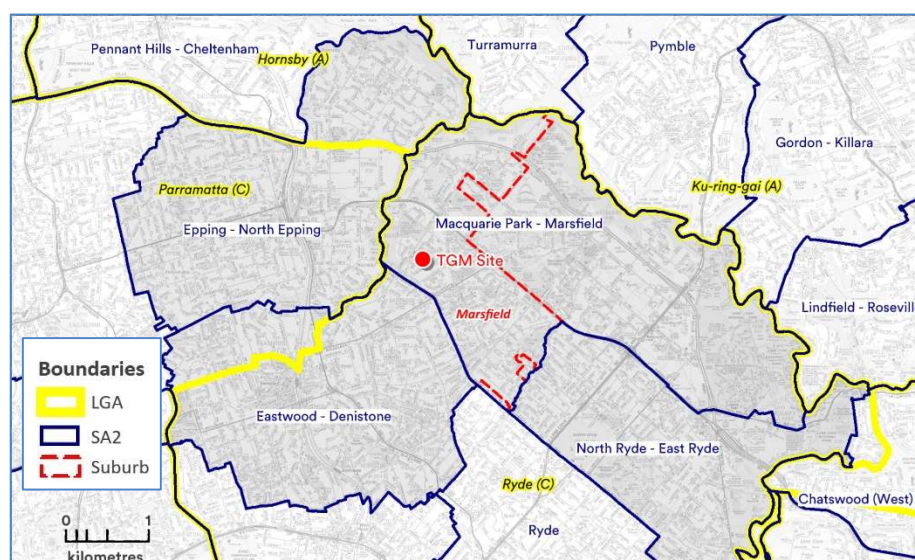
Changing demographics & housing market

This section traces the demographic and housing changes and the nature of the housing market in the suburbs surrounding TG Millner Field with a particular focus on the last 10 years. Long term demographic trends are attributed to the gradual decline in local rugby participation which has forced the relocation of ERC to Castle Hill to be closer to its present-day geographic and demographic base.

Time series data from successive ABS Census collections back to 2006 and forecasts of future population and housing trends by others is reported here at the ABS-defined Statistical Area 2 (SA2)-level. SA2s typically comprise one or two suburbs. Data in this report is presented for the four SA2s shaded in Figure 6.

**Figure 6—
Statistical areas**

Source: ABS; Deep
End Services



4.1 Housing & population characteristics

4.1.1 Population change

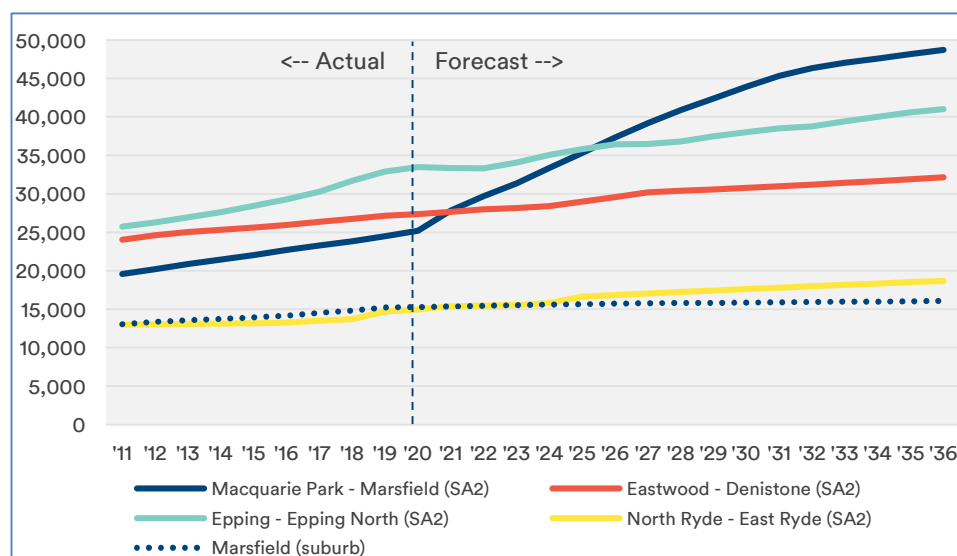
Figure 7 traces the historic population growth of the four SA2s in the region around TG Millner Field to 2020 based on actual Census and ABS estimates and forecasts out to 2036 published by specialist demographers forecast.id. The suburb of Marsfield (which makes up one of the two suburbs in the Macquarie Park – Marsfield SA2) is also charted separately to highlight the more localised population change around TG Millner Field.

The trends and forecasts reveal the following:

- North Ryde – East Ryde SA2 has had low to moderate population growth in the last 10 years (1.3% p.a.) and is forecast to continue at this rate (1.4%).
- Eastwood – Denistone SA2 has a similar pattern with a 10-year growth rate to 2020 of 1.3% per annum and just 1.0% p.a. to 2036.
- The Epping – Epping North SA2 which falls across three local government areas, but mainly Parramatta, has had strong recent growth (2.6% p.a.) which is expected to moderate to 1.4% p.a.
- The Macquarie Park – Marsfield SA2 is the area of greatest change driven by recent unit developments at Macquarie Park and future growth expected from the Macquarie Park (Draft) Place Strategy. It envisages a major intensification of the University and business park precincts north of Epping Road and close to the metro stations with a commercial core of 20,000 jobs and up to 7,500 new dwellings over the next 15 years. Planning for the Macquarie Park precinct retains existing open space and provides new areas of active and passive open space.
- The largely residential suburb of Marsfield around TG Millner Field has seen relatively low population growth over the last 10 years – increasing from 13,100 people in 2011 to 15,300 in 2020 or about +220 people per annum. The forecasts are for an additional 720 people over the next 15 years at just 0.3% per annum.

**Figure 7—
Population growth**

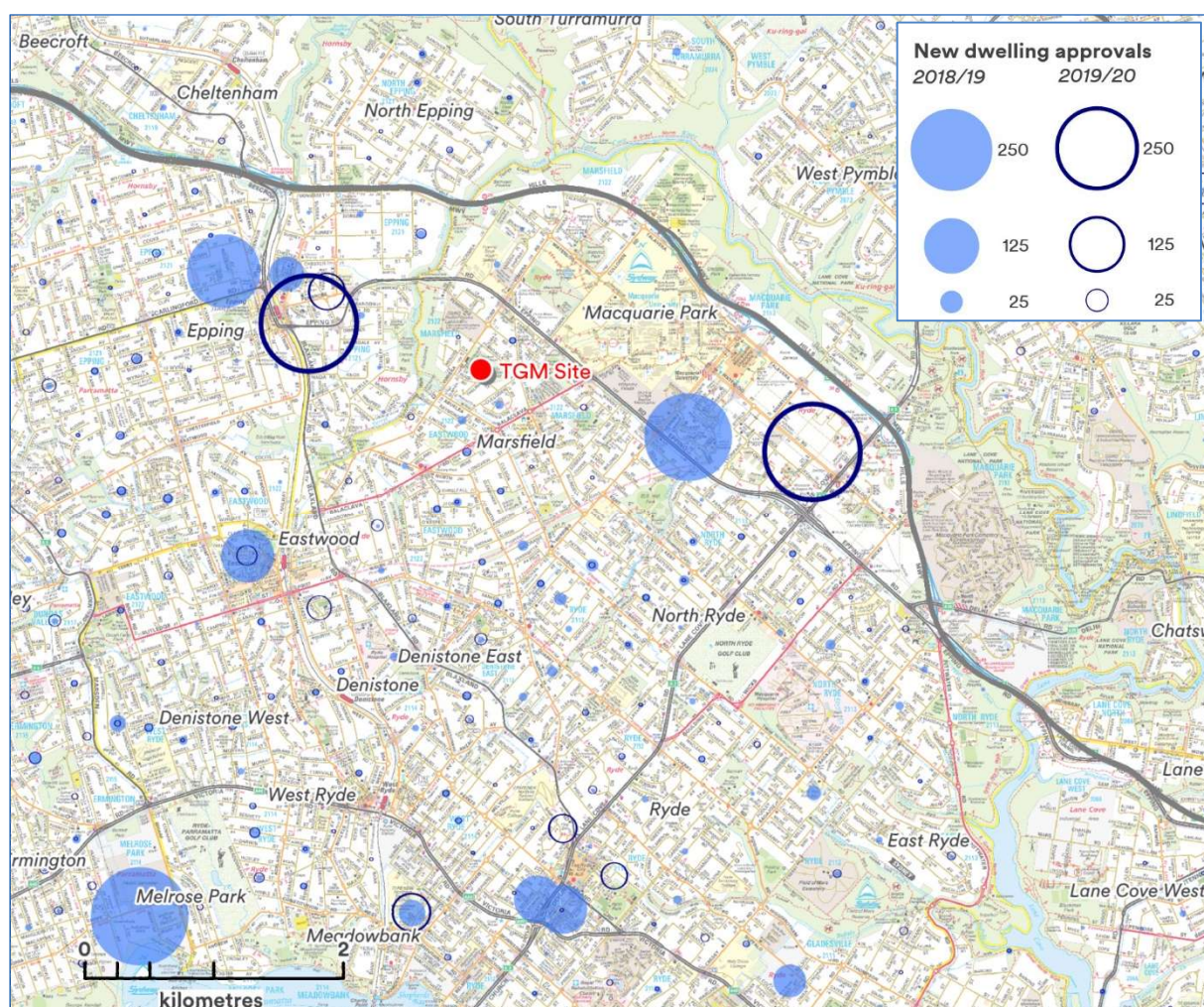
Source: ABS;
forecast.id; Deep
End Services



4.1.2 Development activity

Residential building approvals recorded by the ABS at the smaller statistical area (SA1) are mapped in Figure 8 for the years 2018/19 and 2019/20. It shows the cluster of new apartment developments at Epping and Macquarie Park and smaller concentrations at the Eastwood and North Ryde centres. The suburbs of Marsfield and North Ryde have only limited new dwelling activity where low levels mainly reflect the replacement of existing dwellings.

Figure 8—Residential building approvals by SA1 (2018/19 – 2019/20)



Source: ABS; Deep End Services

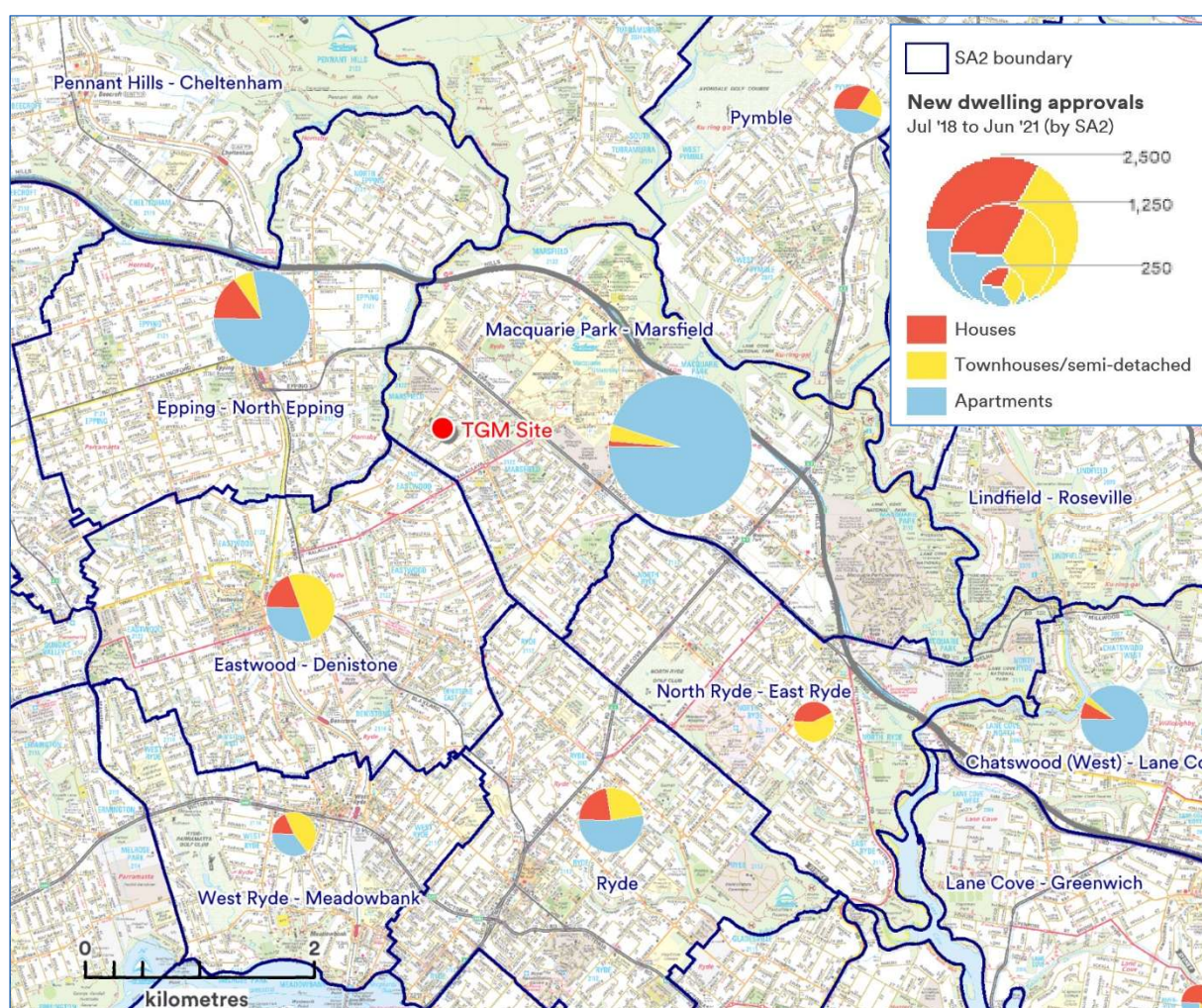
Figure 9 maps the number and mix of residential building approvals by SA2 for the last four years (in total) ending June 2021. The pie symbol on each SA2 shows the number of approvals and the split between detached dwellings, semi-detached/townhouses and apartments. The graphic is centred on each SA2.

In the Macquarie-Marsfield SA2, there have been 2,329 approved dwellings in the last 3 years of which 95% have been in multi-level unit or apartment developments, 1% detached homes and 4% townhouses / semi-detached. In the last 3 years there have been just 87 townhouses/ semi-detached dwelling approvals in Macquarie Park – Marsfield.

Across the four SA2s including Epping, Eastwood-Denistone, Macquarie Park-Marsfield and North & East Ryde, the mix in approved dwellings is 10% detached homes, 14% townhouses and 76% apartments.

Planning approvals are increasingly dominated by units and apartments which cater to small family units but are not suited to the larger families that still characterise the suburbs of Ryde. The Planning Proposal for TG Millner Field (136 dwellings) would provide a significant boost to the choice of available new housing and particularly for families looking to move within, or to, the area into a 3-4 bedroom home.

Figure 9—Residential building approvals by type by SA2 (2017/18 – 2020/21)



Source: ABS; Deep End Services

4.1.3 Suburb profiles

Population, household, language and dwelling profiles are presented for the four SA2 areas in Figure 10 to Figure 14.

Figure 10 charts the change in the population by age cohort between 2006 and 2016 by SA2. It shows a significant increase in the population aged 25-34 years in Macquarie Park-Marsfield, Eastwood and Epping with two or three of these areas also showing increases in the infant, young children, teenage and young adult age groups – although in much smaller increases compared to the 25-34 group.

The 35-44 year cohort increased in Macquarie Park and Epping while the 55-64 age groups increased in all four areas and in three of the 4 areas in the 65+ age groups.

The data reveals the likely ageing of long-established residents in most areas and the influx of new, generally younger adults including families with dependants.

**Figure 10—
Changing age
profile**

Source: ABS

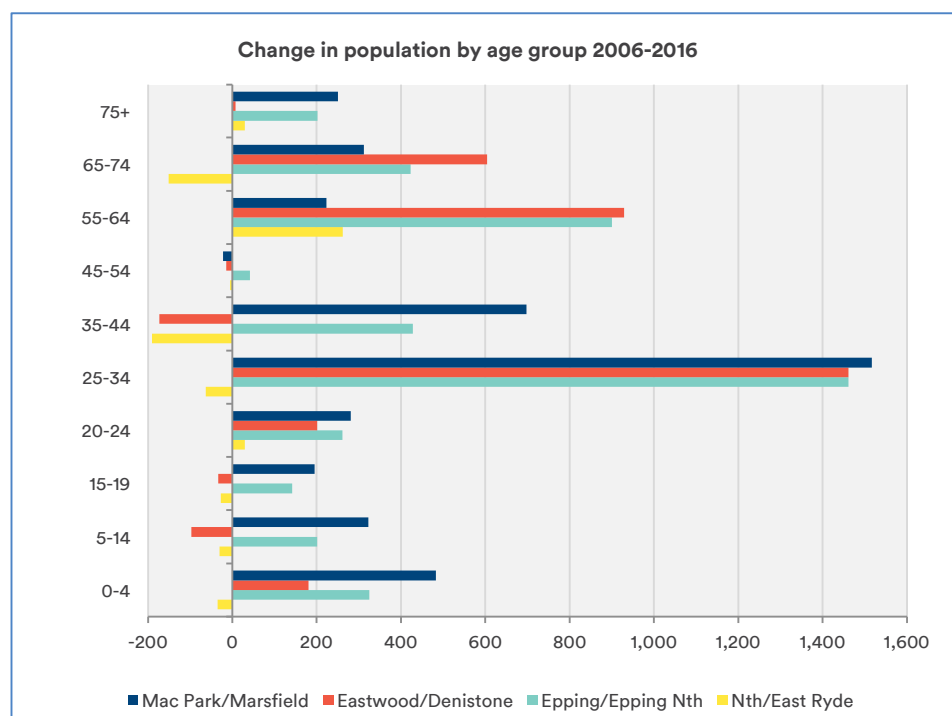
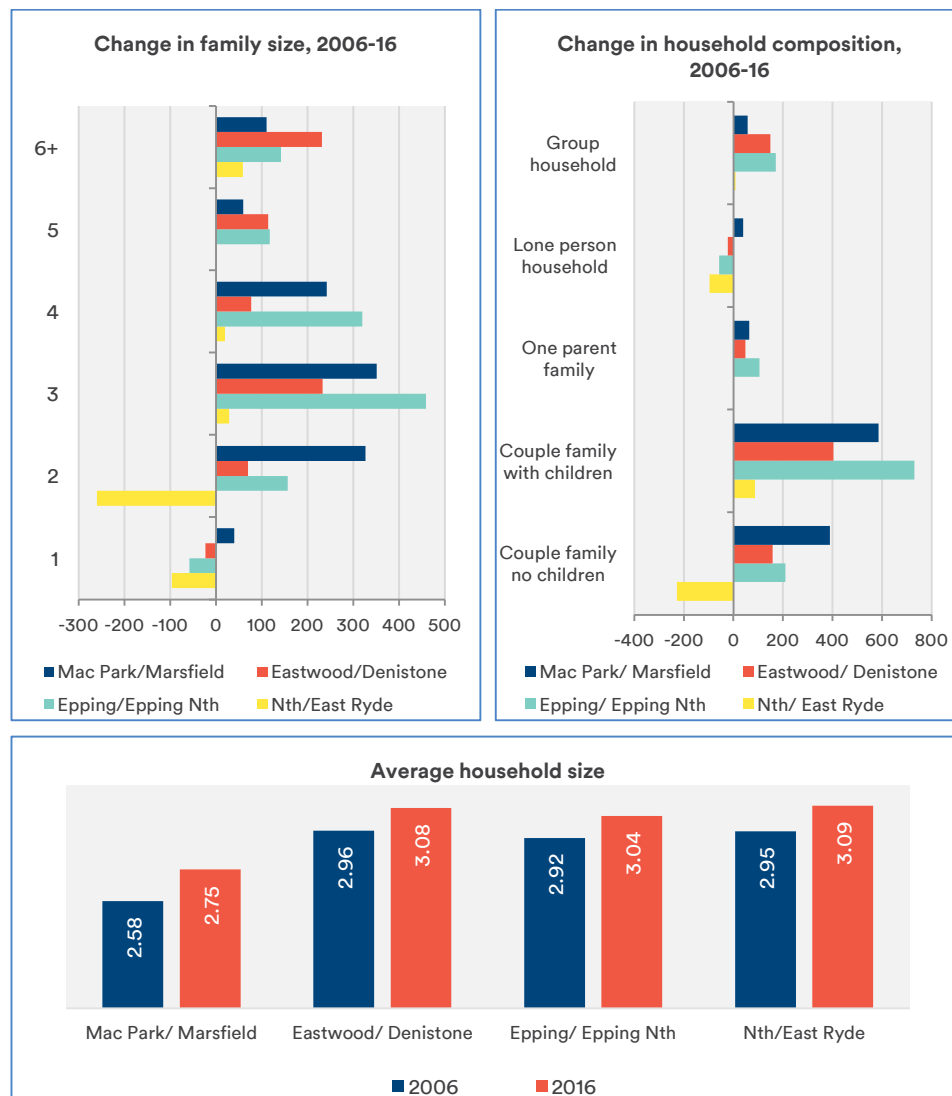


Figure 11 extends the age analysis to show changes in family type and size over the 10 years to 2016. While many inner and middle suburban areas of major cities are seeing the growth in one and 2-person families due to ageing and the rise in apartment living, the suburbs of Ryde and part of Parramatta are showing increases in ‘couples with children’ with consistent increases in 4, 5 and 6 person families. Bucking the trend seen in many other areas, lone-person households are stable or declining in most areas while North and East Ryde saw a decline in two-person families.

The third chart in the series in Figure 11 shows an increase in the average household size of all four SA2s between 2006 and 2016.

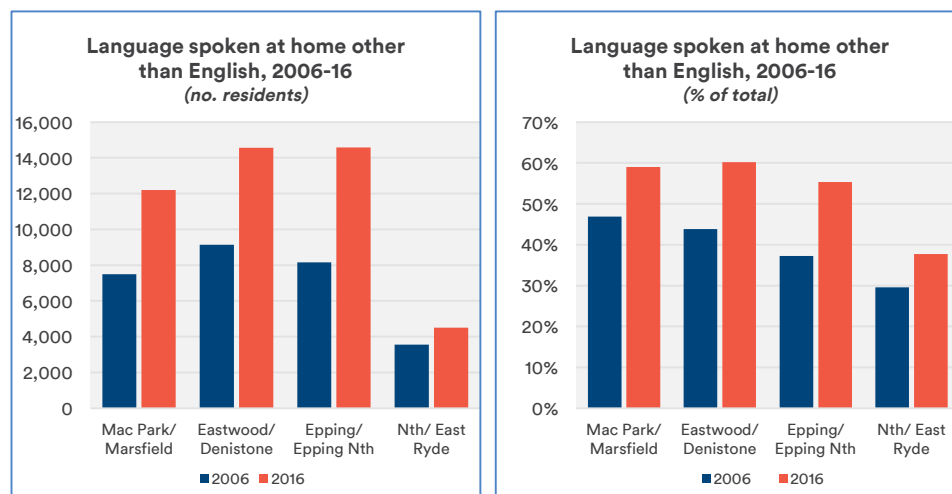
**Figure 11—
Changing
household size**

Source: ABS



**Figure 12—
Language other
than English**

Source: ABS



The changes observed in the age and family size and structure are linked to the changing cultural and ethnic diversity of the inner and middle north-west suburbs.

Figure 12 shows that three of the four areas had a significant increase in residents who spoke a language other than English (LOTE) at home between 2006 and 2016. The LOTE population group increased from 28,350 in 2006 to 45,800 in 2016 – an increase of 62% against a general population increase of 17%. In Macquarie Park – Marsfield, Eastwood and Epping the LOTE population made up 55-60% of all residents in 2016 – a proportion likely to have increased after the 2016 Census.

Across the four SA2s, the average nominated region of ancestry of all residents in 2016 included:

- North East Asia (mainly China) – 42%
- Southern and Central Asia – 10%
- Southern and Eastern Europe – 9%
- South East Asia – 4%
- North Africa & Middle East – 3%

These demographic changes, including the gradual but significant population who have migrated from, or trace their family origins to, non-rugby playing countries, appear to be at the heart of the declining level of rugby participation and membership in what has been the traditional ERC heartland.

The close presence of Macquarie University generates demands for student housing in the area, particularly from international students whose LOTE status is picked up in the Census tables. In Macquarie Park – Marsfield, 20% of the population (but mainly in Macquarie Park) were tertiary education enrolled students. This rate fell to 10% in Eastwood and Epping and 7% in Ryde.

**Figure 13—
Residents attending
University**

Source: ABS

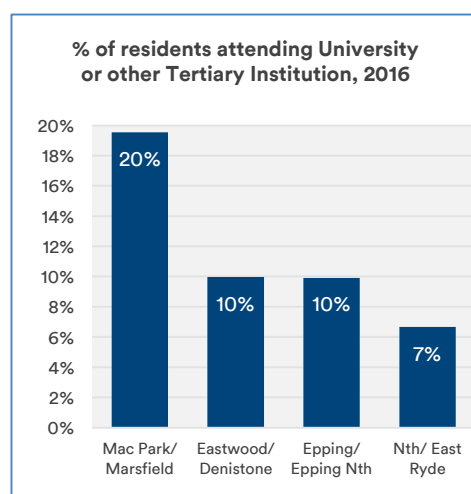


Figure 14 shows that detached homes are the dominant dwelling characteristics of Eastwood (64%), Epping (60%) and North & East Ryde (80%) however Macquarie Park – Marsfield has just 20% of its dwelling stock as detached homes with 36%

semi-detached and 44% flats and apartments. Marsfield itself is mainly detached dwellings however areas of Macquarie Park close to the University have low rise student accommodation and large villa-unit developments dating to the subdivision of the area in the 1960s and 70s. This pattern is evident in Figure 15 which maps the number of semi-detached dwellings and townhouse by small area.

Figure 14—Dwelling structure & tenure

Source: ABS

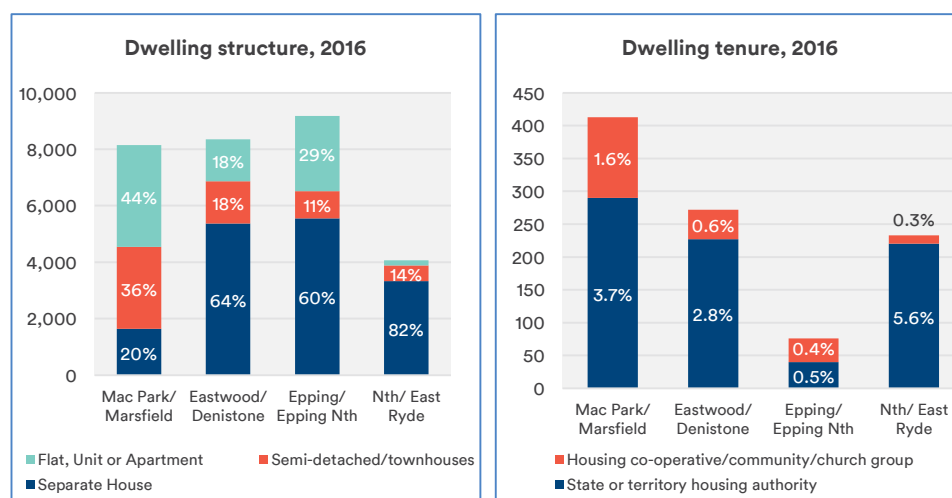
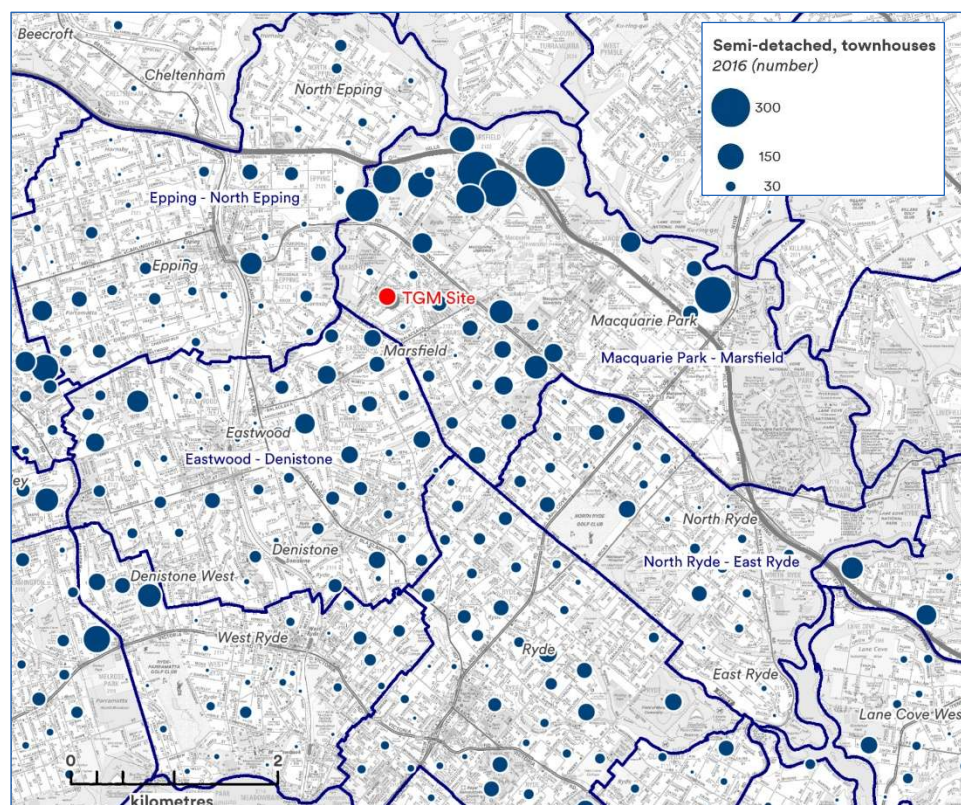


Figure 15—Semi-detached, row or terrace houses, dwellings, townhouses by SA1, 2016

Source: ABS; Deep End Services



The Planning Proposal proposes to dedicate 5% of all lots on the site for affordable housing. The second chart in Figure 14 shows the number and proportion of dwellings owned as State housing or by a co-operative, community or church group offering (usually) subsidised rent.

About 3.7% of dwellings in Macquarie Park – Marsfield are State housing with another 1.6% in a co-operative or not-for-profit group. The combined proportions in other adjoining SA2s range from 5.9% in North & East Ryde, 3.3% in Eastwood and 1.0% in Epping. The proposed 5% dedication of lots to affordable housing at the TG Millner site is fair and consistent with the average proportion of subsidised housing in the broader area.

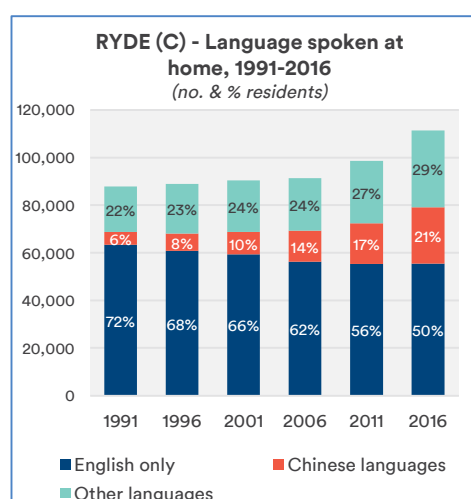
4.1.4 City of Ryde trends

While the previous section shows detailed characteristics at the SA2 level between 2006 and 2016, other demographic variables can be traced over a longer period at the wider local government area level.

Figure 16 charts ‘language spoken at home’ by City of Ryde residents in the six Censuses from 1991 to 2016. The proportion speaking ‘English only’ fell from 72% in 1991 to 50% in 2016. If the recent 15-year trend to 2016 has continued then the 2021 Census figure (yet to be released) could reveal a figure of around 45%. Over the 25-year period, the proportion of residents speaking ‘Chinese languages’ has increased from 6% to 21% and ‘Other languages’, from 22% to 29%.

Figure 16—City of Ryde language spoken at home 1991-2016

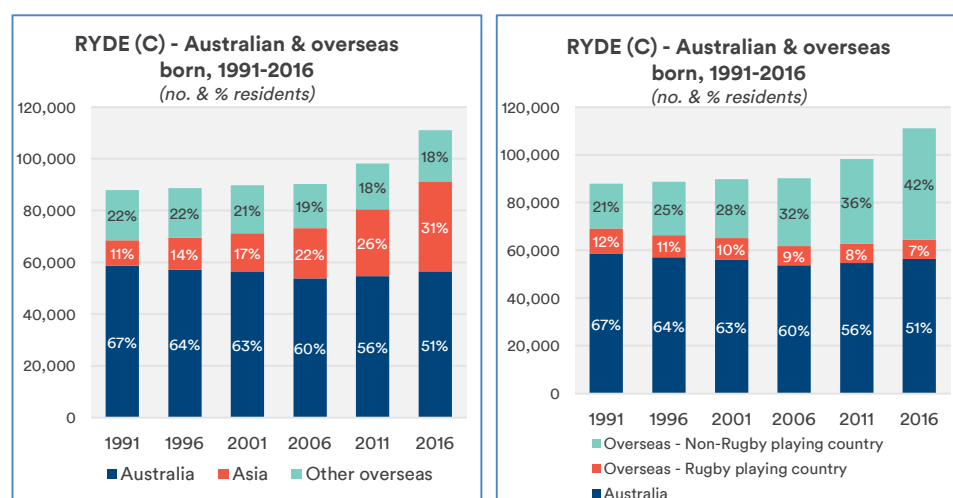
Source: ABS



A time series of City of Ryde residents born in Australia or overseas from 1991 to 2016 is shown in the two following charts (Figure 17). They largely mirror the ‘language spoken at home’ trends. In 1991, around the time ERC first identified a shrinking player and supporter base, there was a significant 33% of Ryde residents who were born overseas. At that time, one-third of overseas born residents were from Asian countries. By 2016, the ‘overseas born’ proportion had increased to 49% with over 60% of the overseas born originating from Asia.

Figure 17—City of Ryde overseas born 1991-2016

Source: ABS



4.2 House price trends

Home sales data for the four SA2s reveal trends over time which lend further support to the Planning Proposal. Figure 18 charts the number of annual home sales by SA2 from 2011 to 2021 (year to date) for detached dwellings and townhouses¹.

Sales of detached homes in Macquarie Park – Marsfield are consistent averaging about 50 per annum. Areas of Eastwood, Epping and Ryde had a 3-year period from 2013-2015 when sales volumes were high. Since 2015, sales volumes have fallen indicating a more tightly held market.

Townhouse sales volumes tend to fluctuate more widely with much lower volumes – as little as 5-10 per annum in Macquarie Park and East & North Ryde. In Eastwood and Epping, volumes are slightly higher averaging between 15 and 30 per annum.

Average house price trends in the four SA2s show a similar pattern in the last 10 years. Average prices in Macquarie Park – Marsfield have been similar to North & East Ryde in the last 5 years while Epping and Eastwood have also tracked a similar path to each other but at higher price points than Marsfield and Ryde.

Average prices show steady gains from 2012 to 2017 before a correction of about 10-15% in 2018 and 2019. Sales recovered slightly through 2020 but in 2021 (year to date) prices have followed city and nation-wide trends with a sharp increase. For the first time in the 10-year period, the average house price in all four areas is almost identical, ranging between \$2.21 million and \$2.26 million.

¹ The subscription data base does not distinguish between separate (detached) dwellings and townhouses or semi-detached dwellings. For this analysis, a dwelling sold on more than 400 sqm of land area is assumed to be a detached home and on under 400 sqm of land area a townhouse.

In 2021 (year to date), house price increases over last year have been:

- Macquarie Park – Marsfield +27%
- Eastwood +15%
- Epping +22%
- North & East Ryde +32%

The average compound annual increase in each of the four areas over the last 10 years is similar; between 6.6% and 8.4% p.a. with a region average of 7.4% p.a.

Prices for townhouses or semi-detached dwellings have, as expected, followed a similar trend – although individual year data needs to be treated with caution given the low sales volumes in some suburbs.

The average sale price for a townhouse-type dwelling ranges from \$1.6million in Eastwood to \$1.83 million in North & East Ryde. Price increases in the last 12 months have been lower than detached homes at 10-13% across the suburbs. The 10-year average increase is however similar to detached homes at about 7.8% per annum.

Figure 18— Annual house sales by SA2

Source: APD
Pricefinder

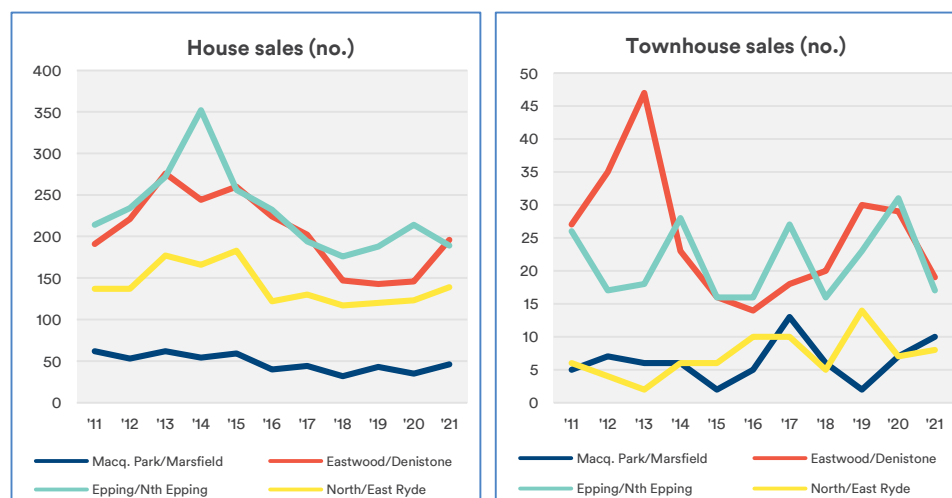
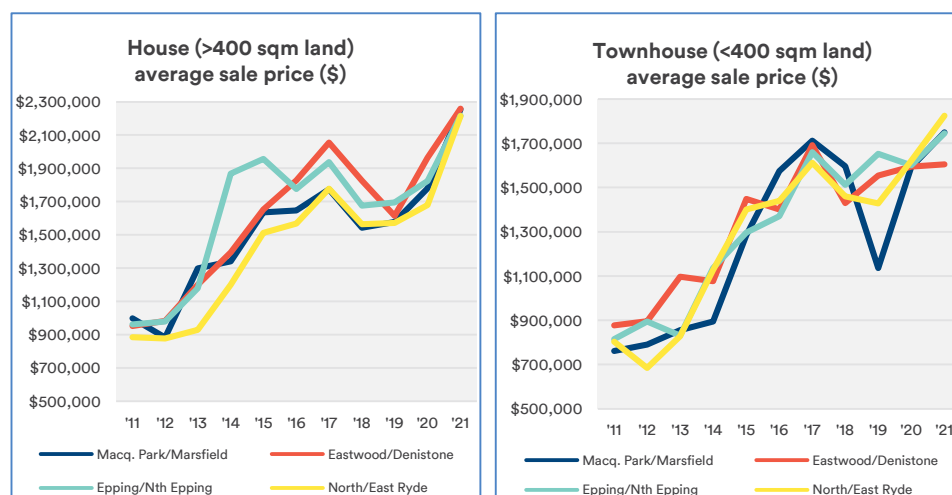


Figure 19—House price trends

Source: APD
Pricefinder



4.3 Conclusions

The cultural profile of Marsfield and other suburbs of Ryde and Parramatta continues to evolve with more than 50% of residents born outside Australia and almost 60% of Asian ancestry. While these changes have reduced the traditional support base for ERC in the area, the trend towards larger families – both young and extended – is generating high demand for 3–4-bedroom homes in the area. There is little or no new housing product similar to the Planning Proposal in the area.

For many similar families looking to move into the area, the dominant new housing stock brought to market in Macquarie Park, Top Ryde, Epping and Eastwood is units and apartments – a product not suited to many buyers.

The Planning Proposal brings a range of allotments and dwellings of 3-4 bedrooms that will be well received by families looking to upgrade or move into the area. The semi-detached, energy efficient homes with small gardens will also be popular with older buyers looking to downsize and young families looking for contemporary, low maintenance homes.

5

Benefits

5.1 ERC & NRRSL

The ongoing viability of Eastwood Rugby is strongly linked to the relocation of the club to Castle Hill and the planning and financial outcomes that can be achieved through a redevelopment of TG Millner Field.

ERC's new Castle Hill base will be a state-of-the-art facility close to the geographic and demographic base of the club's playing and supporter base. The move gives ERC a significant new income stream not available at TG Millner Field including ticketing, increased game day crowds, food and beverage rights, unlimited sponsorship and venue hire.

While ERC's move is not conditional on the Planning Proposal, a successful resolution will ensure that funds can be deployed to establish training, academy and game-day facilities required at Castle Hill (not funded by The Hills or State Government) and to support and grow the game of Rugby Union in its district.

NRRSL has supported the continued operation of a registered Club at the TG Millner site since it took over the ground lease, management rights and maintenance obligations in 2000. The high running costs of an ageing facility and low revenue base have been an unsustainable drain on NRRSL's resources. While still maintaining a healthy membership base, NRRSL also has its own challenges with the shifting demographic base of its traditional membership area.

The successful redevelopment of the TG Millner site will enable NRRSL to resolve its current contractual obligations to acquire the site and deploy those resources (both financial and human) in its existing premises and core activities at North Ryde. This will help it to remain a vital component of the Ryde community for years to come.

5.2 New housing

The Planning Proposal will facilitate 132 low density (townhouse style) dwellings in an area characterised as a traditional mid-20th century residential suburb with few comparable development-ready infill sites. The proposed layout and home styles are based on best-practice urban infill projects in Australia.

Population forecasts for Marsfield² by specialist demographers show low growth assumptions including an increase in dwellings of +370 and population growth of +720 people from 2021 (pop. 14,327) to 2036 (pop. 15,045). The planning proposal for TG Millner Field would account for 36% of the assumed new dwellings in Marsfield over the next 15 years in one project. The project goes a long way to achieving the population targets for the suburb – identified in the draft City of Ryde Housing Strategy.

The replacement of an under-utilised private recreation uses with a low-density infill housing development (and public open space) at no higher (FSR) density than the surrounding residential area is a positive planning and economic outcome.

The proposed subdivision with an average allotment size of about 240 sqm will facilitate a range of compact and energy efficient dwellings in a landscaped setting. The mainly 3 and 4-bedroom homes will be well suited to the growing number of large families settling in the area and the increasing average family size seen in recent Census results.

The semi-detached housing form is well-suited to older couples who have lived in the area for many years who have an option to downsize from a large traditional home to a smaller, low maintenance dwelling with a private yard and small garden. This is important for older residents and downsizers to maintain existing social and other networks in the area.

Similarly, the proposed housing style is also attractive for existing young couples or families in the area who may have initially moved to an apartment and are now looking to upgrade to a larger home. A relocation within the area enables families to preserve existing social and extended family networks and employment and educational connections to the area.

Smaller blocks are preferred by many families where the low maintenance needs are more compatible with their lifestyle including family, social and leisure pursuits.

The location also provides young couples or families with the option of purchasing a new home closer to central Sydney rather than shifting further out to more distant estates.

The proposed commitment of 5% of lots to affordable housing will increase the supply of affordable housing in an area which has a small existing stock level.

Finally, a low-density Planning Proposal at TG Millner Field could be an exemplar for any other similar sites in the City of Ryde including the nearby CSIRO site.

² <https://forecast.id.com.au/ryde>

5.3 Integration and use of existing infrastructure

The Planning Proposal makes good use of existing utilities and infrastructure while new residents have the benefit of established retail, community, education, medical and other support services available to the population of an established suburb.

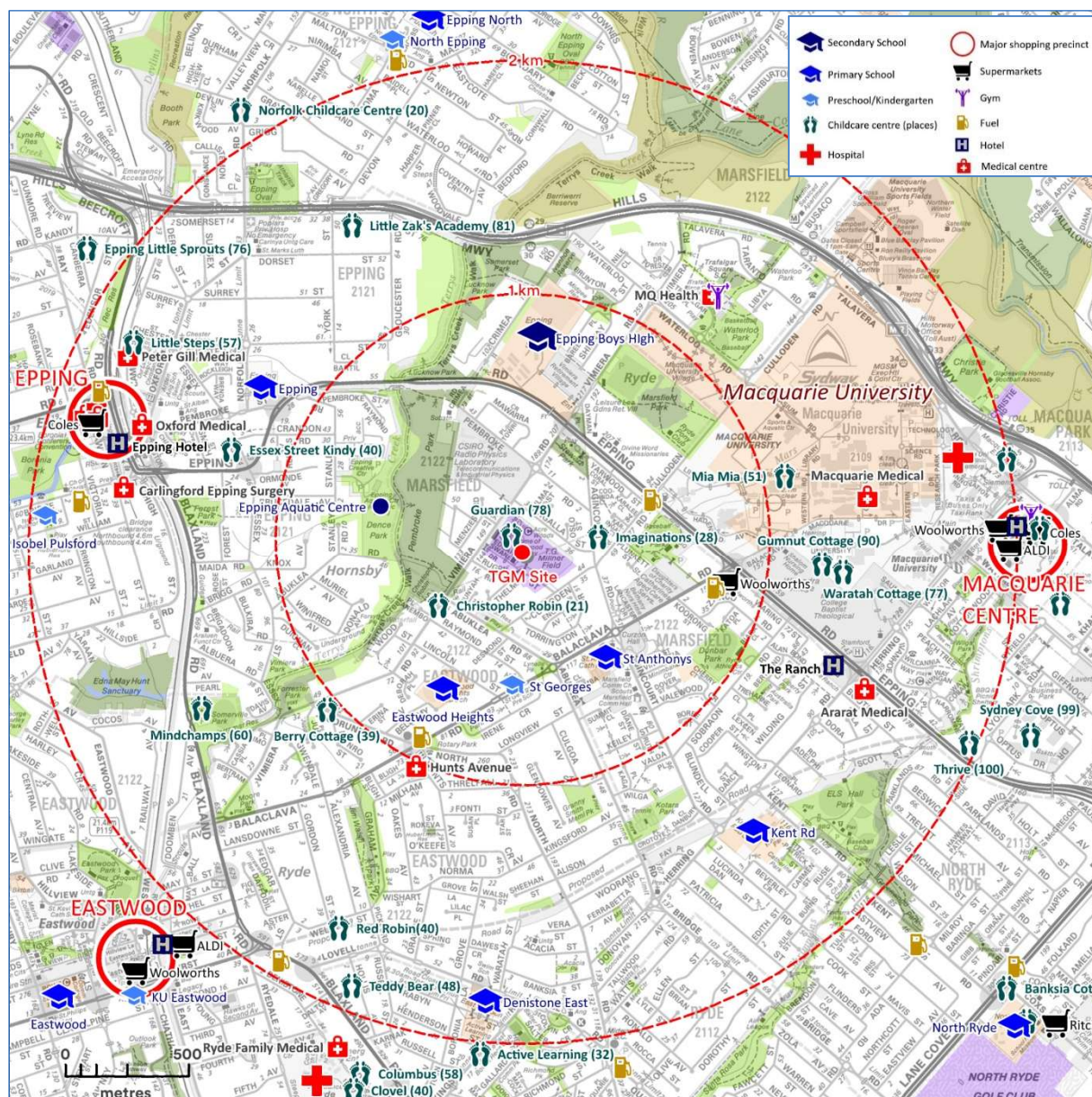
Figure 20 shows the site in relation to a range of local facilities. Future residents on the TG Millner site will have access to:

- Established retailing including Woolworths Marsfield on Epping Road and local shops and restaurants on Balaclava Road, both within 1km of the site. The Macquarie Centre is just 2km east of the site, Sydney's second largest shopping centre behind Parramatta with 135,000 sqm GLA (retail). The business and cultural centres of Eastwood and Epping are approximately 2km by direct line from the site.
- Three childcare centres and St Georges Kindergarten within 1km of the site.
- Epping Boys High School, Eastwood Heights Primary School and St Anthony's Catholic Primary School within 1km of the site.
- A general medical practice with 6 GPs in Eastwood, 1km from the site. Other health and medical services are available on the university campus including Macquarie University Hospital and Health Sciences Centre.

While the TG Millner site is not well served by public transport for a major sports venue, for local residents and commuters it has good bus connections to nearby stations on the Northern and Northwest lines.

The 551-bus service along Vimiera Road has connections to Epping Boys High and Eastwood Railway Station. On Epping Road, just north of the site, the 292 route to the Sydney CBD runs via Macquarie University and the University and Macquarie Park railway stations on the Northwest Metro line. Other routes extend north and west along Epping Road with connections to Epping Station.

Figure 20— Local services and facilities



Source: NSW Department of Planning, Industry and Environment; Deep End Services

5.4 New public open space

Figure 21 shows the Public Space layers of LEPs across the area. Within 1km of the TG Millner site, existing and future residents will have access to:

- 36.84 ha of Public Recreation zoned land including informal areas and walking trails along Terrys Creek, active playing fields and a range of small suburban parks.
- 24.28 ha of Environmental Conservation zoned land including bushland and walking trails on the east side of Terrys Creek and part of Marsfield Park.

The combined area of 61.12 hectares represents 19.4% of the land area within 1km of TG Millner Field.

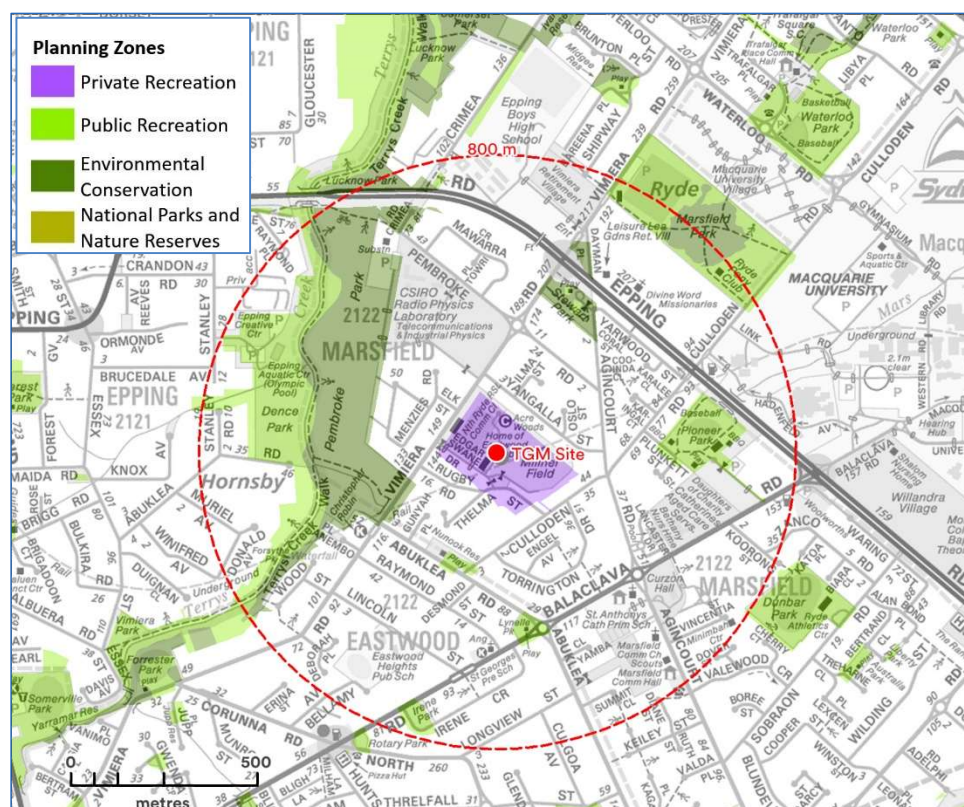
For the 10,256 people living within 1km of the TG Millner site, the current provision of public space is **59.6 sqm** per capita. This is consistent with the average across the Greater Sydney area³ of about 60 sqm per capita and the average in Greater Melbourne, recently measured at 55-60 sqm per capita⁴.

On these measures, the local area of Marsfield is generally well supplied with formal and informal areas of public open space.

The existing TG Millner Private Recreation land (6.2 hectares) effectively increases the area of open space within 1km of the site by about 10%. The loss of this Private Recreation land needs to be seen in the context of its restricted access to the general public and limited use by sporting clubs. The only public entry point to TG Millner Field is the driveway from Vimiera Road where the gates are often locked on weekends. All other boundaries are fenced.

Figure 21—Public space

Source: NSW Department of Planning, Industry and Environment; Deep End Services



Under the Planning Proposal, the proposed transfer of approximately 10,000 sqm of land to Council for public open space would increase the available public open space within 1km of the site by 1.7%. While the net increase seems small, the land

³ Greater Sydney open space provision excludes Wollondilly, Katoomba and Hawkesbury LGAs, large national and state forests beyond Sydney and Defence land.

⁴ Metropolitan Open Space Network: Provision and Distribution, June 2017 (Victorian Planning Authority)

will be of high public and economic value to Council and the community because of its central position relative to the surrounding housing, the quality of the well-maintained community park and the removal of the grandstand and existing cyclone fence on Vimiera Road allowing the general public open and unrestricted access to the field and any amenities developed by, or for, Council.

The value of the land as an informal public space will be even higher based on the possible sale and future redevelopment of the similar-sized 6.6-hectare CSIRO site on Vimiera Road.

The infrastructure and construction cost to develop the open space and informal recreation facilities shown in the Site Plan has been estimated at \$6.7 million (excluding land and including consultant costs) plus contingencies. This is a significant and valuable asset to be transferred to Council.

The open space dedication is a positive outcome for Council and the community. An alternative development scenario of Seniors Living (permitted under State Environmental Planning Policy (Housing) 2021 (SEPP)) would have no requirement for public open space dedication.

5.5 Employment generation & State value add

The Planning Proposal will generate employment through civil works and dwelling construction and indirect employment in the supply of materials, finished products and services. Additional value to the NSW economy will be generated through on-site jobs in the construction phase.

Table 1 sets out the estimated development costs with direct and indirect employment levels generated in each stage. The estimated construction costs⁵ are:

- \$13.5 million for demolition, remediation, infrastructure, services and subdivision
- \$81.3 million for the contracted building cost of 132 dwellings

**Table 1—
Construction
employment
estimates**

Source: Winston Langley, ABS, Deep End Services

Item	Dwelling		Total
	Civil works	construction	
Proposed dwellings	132	132	132
Construction cost	\$13.5m	\$73.0m	\$86.5m
Labour component	\$8.1m	\$36.5m	\$44.6m
<u>Employment</u>			
Direct employment (FTE job years)	84	378	462
Indirect employment (FTE job years)	74	628	702
Total employment (FTE job years)	158	1,006	1,163
Annual value add	\$16.8m	\$68.4m	\$85.2m

Applying average full-time equivalent (FTE) wages in the construction industry⁶ to estimated labour costs generates an estimated **462 FTE job years** from the civil and

⁵ Provided by MitchellBrandtman

⁶ ABS Catalogue 6302.0 Average Weekly Earnings, Australia

home building works. For a 3-year construction period it would be the equivalent of **154 FTE jobs** on site for 3 years.

Other employment is created in the wider economy through the supply of materials, finished products, equipment and other services to the construction sector. Using ABS multipliers, an additional **702 FTE job years** are generated during construction.

For each direct job generated in construction, the ABS estimates additional value multipliers⁷ for the broader economy. Applying differential rates to civil and construction works generates **\$85.2m** of value to the state economy.

5.6 Retail expenditure

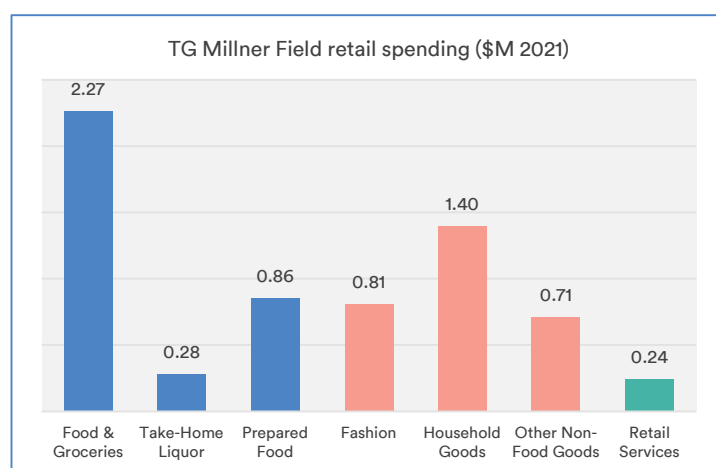
Annual retail spending of **375** future residents of the TG Millner site is set out in Figure 22. An average spending profile similar to current-day Marsden residents is assumed.

Future residents will have a spending capacity of **\$6.57 million** per annum, of which \$2.55 million will be on food, liquor and groceries and \$0.86 million on takeaway food and restaurant meals.

A high proportion of this spending will be directed to nearby local centres including Marsfield Woolworths, Eastwood and the Macquarie Centre. Local shopping nodes, such as the group of shops and eateries on Balaclava Road will also benefit from a local increase in population.

Figure 22— Annual retail spending by new residents

Source: Marketinfo, Deep End Services



5.7 Rate revenue

A residential development at Marsfield will generate new rate revenue for the City of Ryde.

Based on the current estimated average rate levied on residential properties in the City of Ryde (including lower value flats and apartments) the 132 proposed dwellings would generate estimated annual rate revenue to Council of approximately **\$248,000 (\$2021)** per annum.

⁷ ABS Catalogue 81550DO002_201920 Australian Industry, 2019-20

6

Conclusions

The important background to the Planning Proposal and assessments of the proposal itself lead to the following conclusions about its economic and community benefits:

- The Planning Proposal will help facilitate and fund the relocation of ERC from TG Millner Field to Castle Hill. The move will significantly improve the financial future of the Club, bring it closer to its player and supporter base and allow it to develop and foster the game in an area with a strong rugby following. The Planning Proposal will enable ERC to fund its obligations to certain works at its new home base, while preserving its strong historic/foundational links to TG Millner Field.
- The Planning Proposal will alleviate the present financial burden on NRRSL of its acquisition, maintenance and administration of TG Millner Field since 2000. A release from its present obligations will enable NRRSL to focus on its core asset and activities at North Ryde to ensure it remains a viable asset for the Ryde community.
- The long-term demographic changes in Marsfield and other suburbs which have weakened the local supporter base and revenue to ERC are generating strong demands for new housing – other than apartment living. The Planning Proposal will deliver a range of low density, 3 -4 bedroom dwellings that are suited to large (young and extended) families and others looking to downsize.
- The proposal, based on best-in-class design practice, will reimagine the area with contemporary low maintenance, energy efficient homes that will be an exemplar development for others to follow.

- The Planning Proposal dedicates a valuable 10,000 sqm of land to Council for public use with the Site Plan showing a range of passive and active spaces. The local community's unrestricted use of this land will, almost certainly, be higher than the current occasional use of TG Millner Field by sporting and spectator groups. This outcome has a significant monetary value to the Council as land for new open space is difficult or expensive to acquire and a high non-monetary value to the community in providing a community asset and a place of high amenity for passive and active recreation.
- New residents have access to a wide range of established retail, education, health and community services and open space resources within 1 km of the site. Local bus services along Vimiera Road and Epping Road provide quick connections to stations on the North and North West lines. The increase in population is modest and unlikely to place undue pressure on existing community services.
- The Planning Proposal will bring a range of other benefits including:
 - Employment generation on site through a 2-3 year construction time frame.
 - Increased local spending to retailers and other local businesses.
 - New rates revenue to the City of Ryde.