



Community Housing

INDUSTRY ASSOCIATION

1

People living in community housing are ordinary Australians who just don't earn as much as others or face other barriers to getting adequate housing in the market. Community housing providers don't discriminate by race, gender, or disability.



2

Community housing providers (CHPs) are not-for-profit organisations that re-invest any surplus revenue into new housing, better services or improving our properties – not into dividends for shareholders or executive bonuses.



3

The community-housing sector has doubled in size over the past decade and now manages 90,000 properties, housing one in every hundred Australians. At least 25,000 new affordable homes have been built by CHPs since 2008. CHPs own real estate assets worth over \$7.5 billion, and annually generate over \$700m in rental income.



4

Government surveys consistently show higher rates of residential satisfaction among community housing tenants than among public housing tenants.



5

Unlike public housing agencies, CHPs can leverage their asset base and cash flows as security to attract private finance and build more affordable homes.



6

The sector's charitable status makes it exempt from GST, land tax and stamp duty. This helps to attract philanthropic donations – enabling CHPs to expand services to tenants and/or new affordable housing output.



7

As well as providing support services for vulnerable residents, CHPs run services for tenants such as work-readiness programs, training and counselling. This is something the private sector model is not geared up do.



8

CHPs bring commercial disciplines to the provision of social housing. They are innovative, entrepreneurial and, unlike private landlords, they're strongly regulated to protect tenants, to safeguard public funds and to ensure they remain solvent.



9

Developers build and flip. Community housing providers manage their housing for the long term, so design matters, and so does quality and running costs for tenants.



10

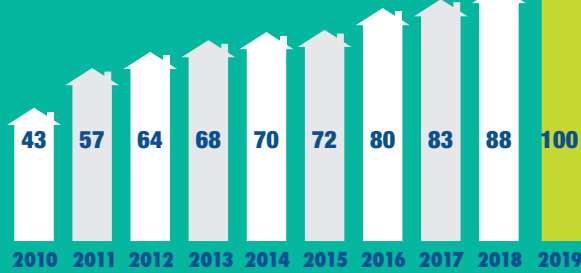
The not-for-profit CHP model is hugely successful internationally. One in 10 Londoners live in some form of community housing. In Amsterdam it is 42%. The model is adaptable to rural districts, regional towns and large metropolitan areas.



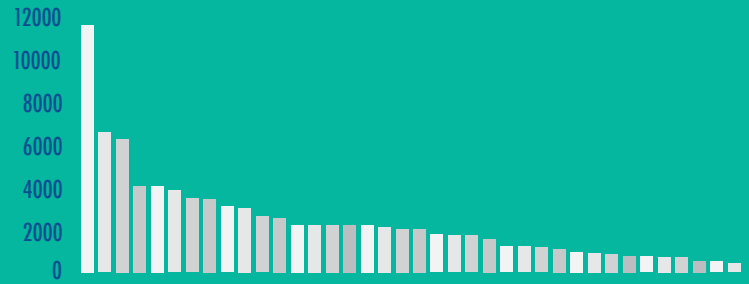
COMMUNITY HOUSING AT A GLANCE¹

Due to management transfers from public housing CHIA estimates the community housing portfolio at October 2019 is approx. 100,000. The largest 38 providers manage 82.5% of these homes. The average size of community housing portfolios is 2357.2²

NUMBER OF CHP DWELLINGS IN AUSTRALIA 2010 - 2018



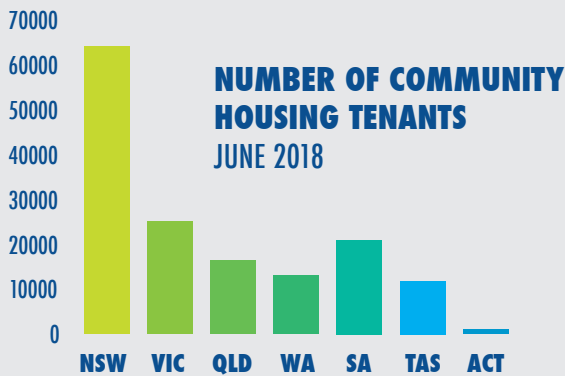
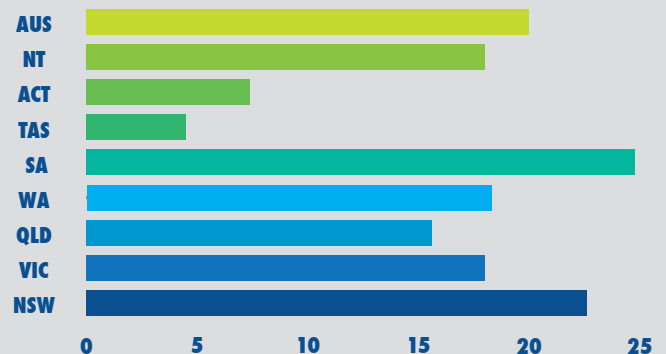
LARGEST 38 CHPs - BY PORTFOLIO SIZE - 2019



COMMUNITY HOUSING AND WELL BEING % RESPONDING



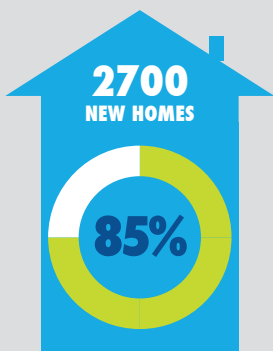
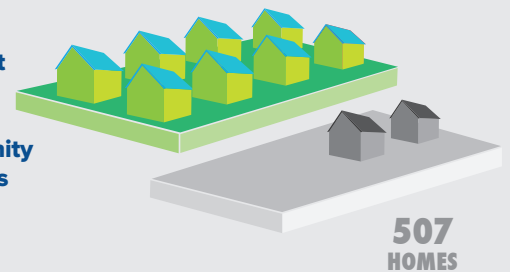
COMMUNITY HOUSING AS A % OF ALL SOCIAL HOUSING - JUNE 2018



8 OUT OF 10

1791 HOMES

New development projects in NSW are developed solely by Community Housing Providers without for-profit partnerships

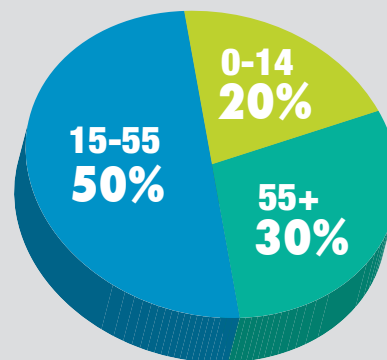


In NSW between 2012 & 2020, 18 CHPs will deliver 2,700 homes with a total value of \$963M. CHPs have contributed almost 75% in debt and equity.

What does this mean?

- \$1B in housing investment
- 1794 affordable
- 550 social
- 350 other
- NRAS, land, cross subsidy contributions

NEW DEVELOPMENT PROJECTS



AGE PROFILE OF PEOPLE LIVING IN COMMUNITY HOUSING JUNE 2018

13.6% of tenants living in community housing are women aged 60 plus*

*source AIHW

¹ Note that nationally consistent data on community housing is unavailable. The data is sourced primarily from the AIHW. The data is available for June 2018 and thus understates the community housing numbers, particularly in NSW where 14,000 additional homes have subsequently been transferred to the management of CHPs. Affordable housing is not included in all state and territory data.

² These figures sourced from publicly available data (e.g. AIHW), company websites and annual reports. It is generally is generally the period up to and including June 2019 unless stated otherwise. However any significant management transfers and mergers since this point have also been included to ensure this data is as accurate as possible.