



HPS Outlook

Greater Sydney Greater Growth

AUGUST 2020



HEALTH PROJECT SERVICES

Research • Analysis • Strategy • Delivery

Greater Sydney: Greater Growth

Our philosophy focuses on using research to help make well informed business and property decisions relating to healthcare businesses that can be implemented today and safeguard for the future. Research can help understand the social and economic drivers of the local area/region and how growth will occur going forward. Our series will initially concentrate on New South Wales with insight on growth corridors, population projections, demographics, local and state government initiatives and major infrastructure projects.

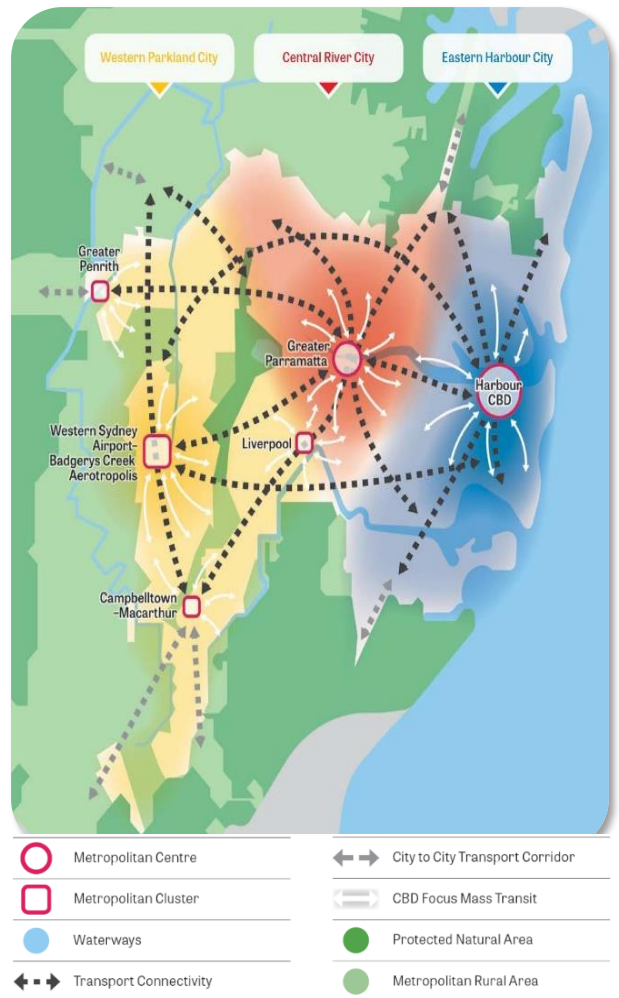
Our first newsletter will focus on a macro overview for Greater Sydney before delving into regions and local areas in more detail.

Greater Sydney Greater Growth

Over the next 20 years growth across Greater Sydney will be guided by the framework The Greater Sydney Region Plan (GSRP) – A Metropolis of Three Cities 2018 established by the Greater Sydney Commission. The plan separates Greater Sydney region into three defined interconnected cities comprising The Western Sydney Parkland City, The Central River City and The Eastern Harbour City. The plan aims to achieve improved livability through a strategy involving the majority of population living within 30 minutes of necessary services including employment, education, health related services and education facilities.



725,000
dwellings by 2036



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 1: Sydney 2056



Greater Sydney: Greater Growth

Population

The population in Western Parkland City is forecast to record the highest percentage growth of 51.4% (or 380,000 people) by 2036 to reach a total population size of 1,120,000 people. In comparison the Eastern Harbour City is estimated to grow by over a third to 3,280,000 people during the same timeframe. An additional 410,000 residents are predicted to live in the Central River City over the next two decades as shown in **Figure 2**.


The Greater Sydney Commission and NSW Government expect the ageing population trend to continue to rise, with the proportion of population aged 65 years and over to account for a fifth of the population in Eastern Harbour City by 2036. In Western Parkland City and Central River City this age group will represent 17% and 16% of total population. Indicating sustained upward pressure on health-related services catering to this demographic group, particularly for the Eastern Harbour City. In contrast, the proportion of children and young adults (19 years or younger) is expected to remain unchanged over this period for Western Parkland City (28%), Central River City (27%) and Eastern Harbour City (22%).

2016

2036


Western Parkland City

 **740,000**
people

 **1.12 m**
people


City River City

 **1.25 m**
people

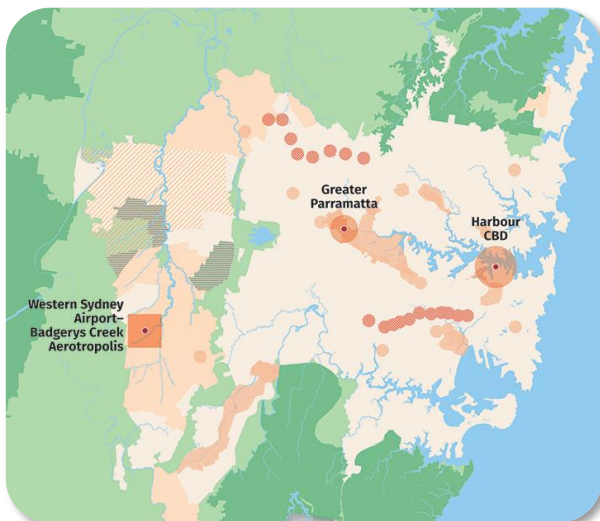
 **1.66 m**
people

Eastern Harbour City

 **2.38 m**
people

 **3.28 m**
people

Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities



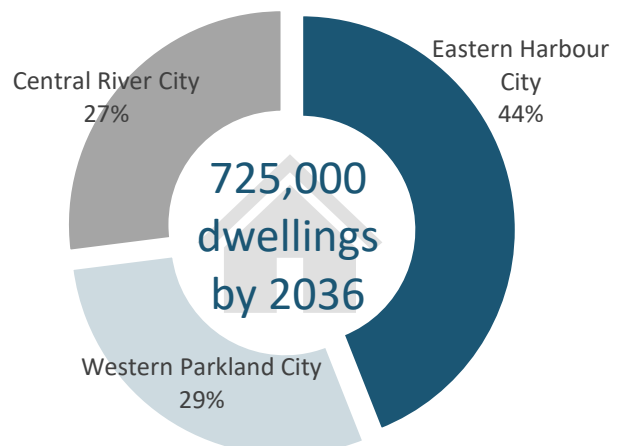
-  Existing Urban Area
-  Urban Renewal Area
-  Land Release Area
-  Growth Area Investigation
-  Transit Oriented Development
-  Urban Investigation Area

Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 3: Additional dwellings 2016-2036 map

Housing

By 2036, an additional 725,000 dwellings are forecast to be required to support population growth across Greater Sydney. The Eastern Harbour City is anticipated to have the greatest demand for new housing with 44% of new dwellings to be sourced in this region. The remaining balance is fairly proportioned to Western Parkland City (29%) and Central river City (27%). A map of current and planned residential areas is shown in **Figure 3**.



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 2: Additional dwellings 2016-2036 by City

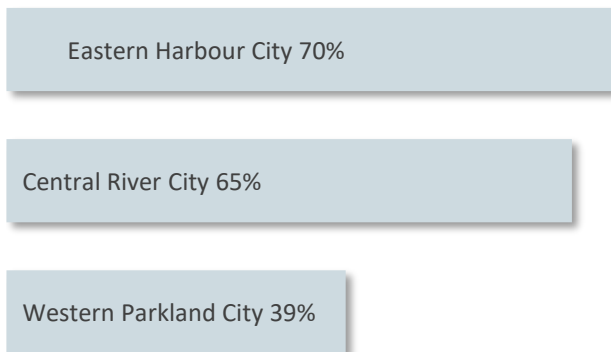


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Employment

The economy will need to increase to generate job opportunities for a growing population base, it is estimated 817,000 additional jobs will be required by 2036. Across the regions, Eastern Harbour City has the largest resident workforce in 2016 with 91%, while Central River City (54%) and Western Parkland City (49%) are notably lower. This may indicate households in Eastern Harbour City have higher incomes resulting in an elevated level of disposable income compared to the other cities. It is important to consider the type of services offered and associated fees to ensure your clients can afford services obtained.

According to the GSRP 2018, the proportion of residents that access city within 30 minutes in 2016 are shown in **Figure 4** below.



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 4: Proportion of residents who access city within 30 mins (2016)



Looking ahead the GSRP 2018 aims to reduce travel time to work for residents by creating more jobs across Greater Sydney. With residents being encouraged and motivated to locate closer to work, there will new demand in areas that are currently growing or are earmarked for further development. Establishing new communities and work zones may see an under supply of health related services for new residents and provide opportunities for new businesses to grow and prosper through longevity. Services in these areas will need to meet demands of family requirements and employment purposes.

Greater Sydney: Greater Growth

Western Parkland City

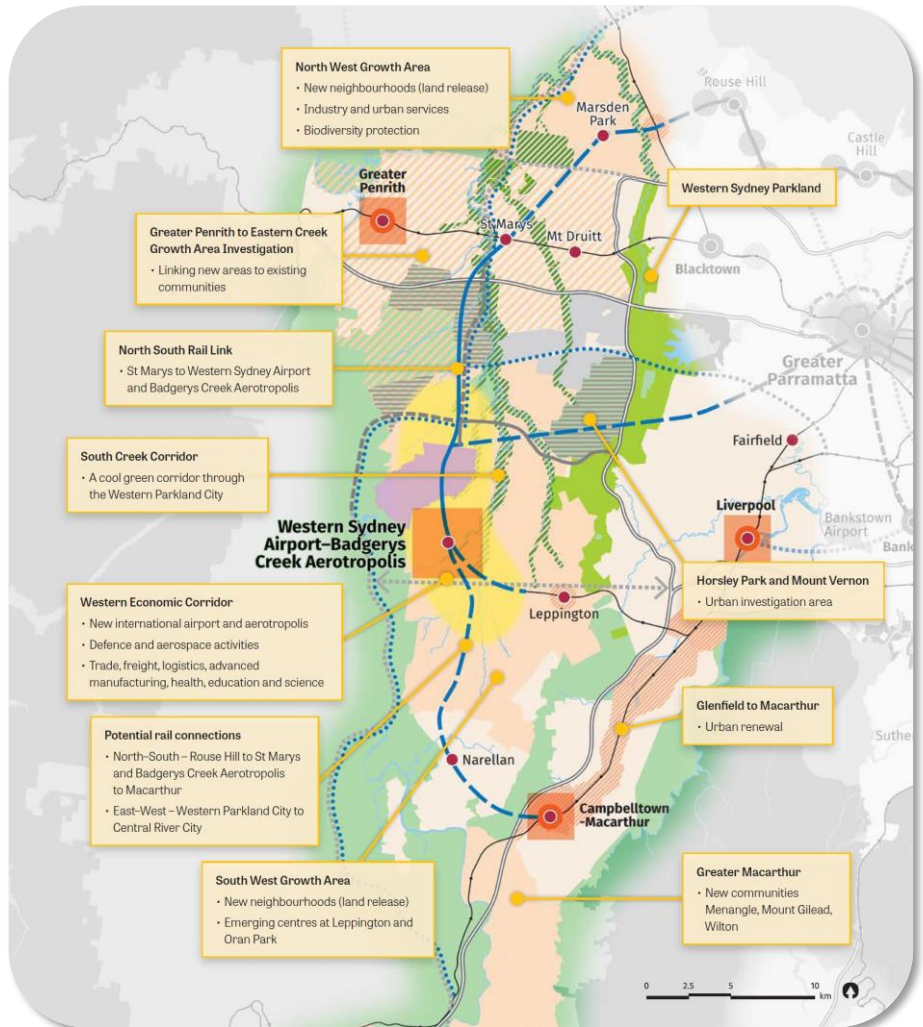
includes: Liverpool, Greater Penrith and Campbelltown-Macarthur.

1.1m
people by 2036

Land releases:
North West
Growth Area

South West
Growth Area

**Western
Economic
Corridor**
Supporting future
employment and
economic growth



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 5: Western Sydney Parkland City: Liverpool, Greater Penrith and Campbelltown-Macarthur

Urban renewal

Urban renewal corridor from Glenfield to Macarthur.

Transport

Construction of new rail line Sydney Metro – Western Sydney Airport.

Western Sydney Airport

Badgerys Creek Aerotropolis will generate growth.

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Central River City

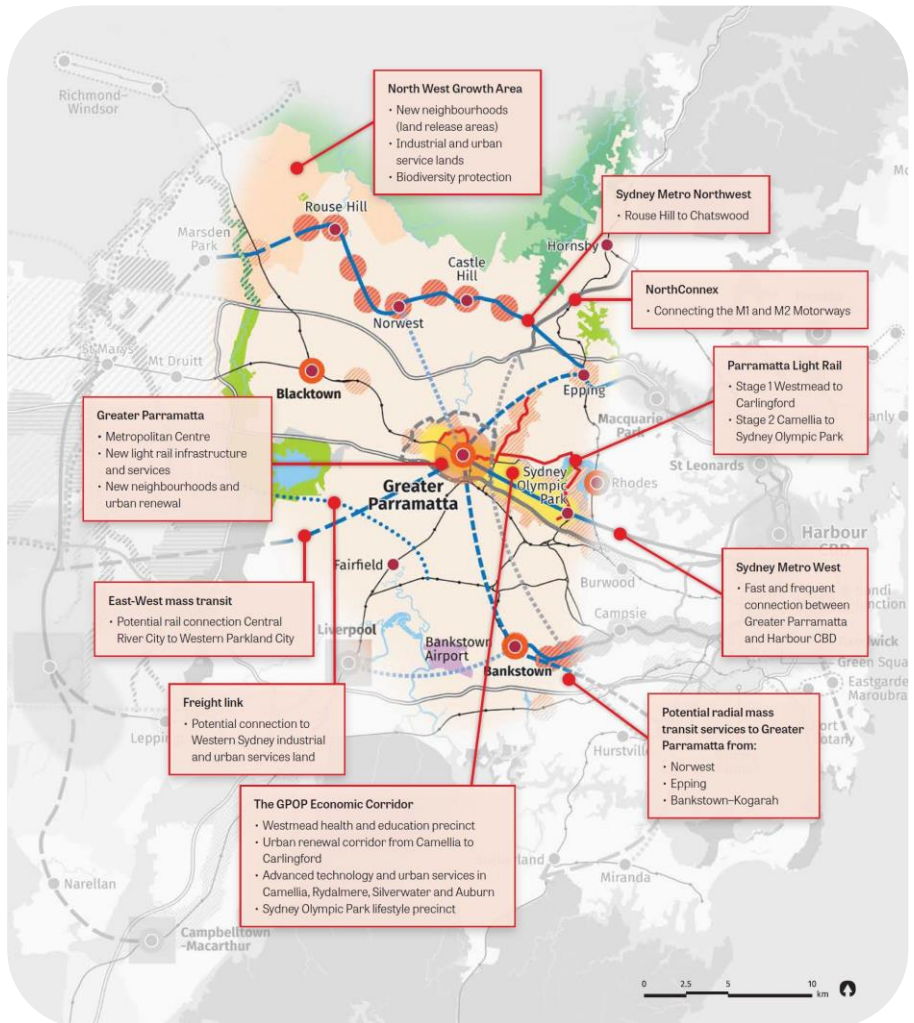
includes: Greater Parramatta and the Olympic Peninsula.

1.7 m
people by 2036

Land releases:
North West Growth Area

Industrial Corridor
Corridor travels from Villawood to Wetherill Park and will connect to Bankstown.

Urban renewal
Increased medium and high density developments...



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 6: Central River City: Greater Parramatta and Olympic Peninsula.

Health & Education

Westmead health and education precinct will play an important role.

Transport

Sydney Metro West rail link
Sydney Metro Northwest rail link
Parramatta Light rail
North Connex

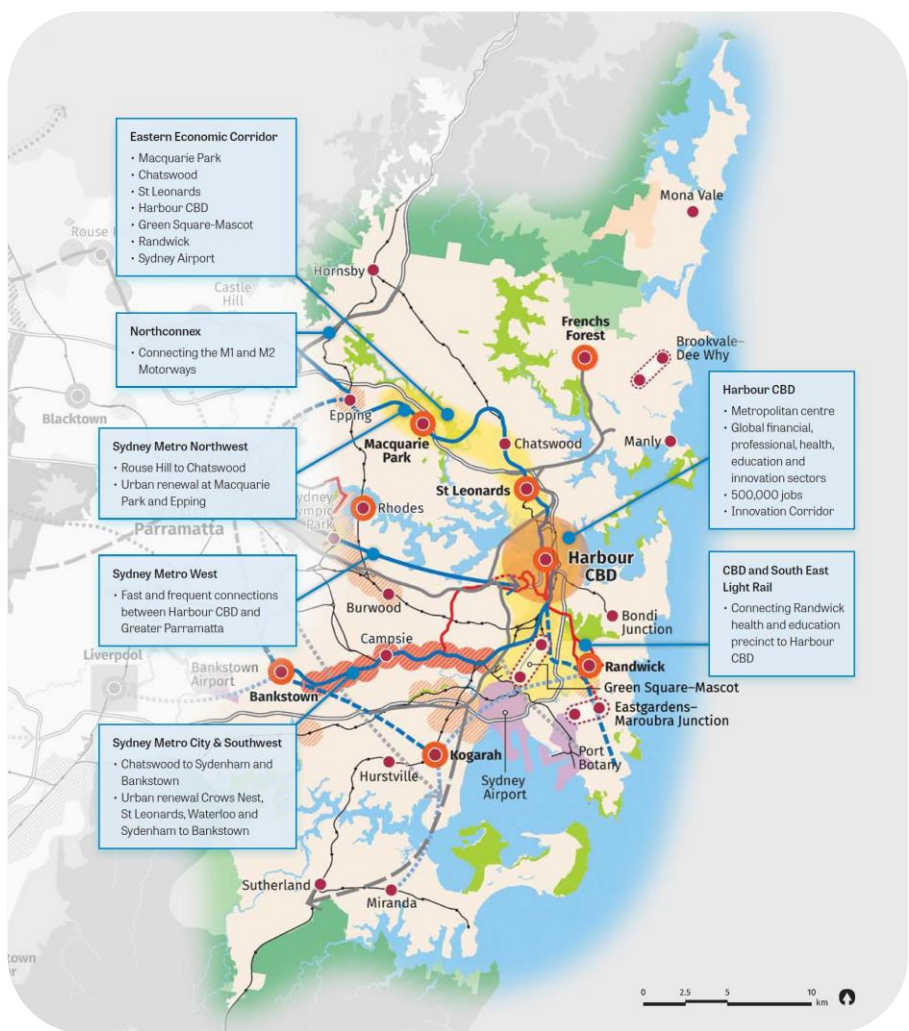
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3.3 m
people by 2036

Innovation Corridor
Located from Camperdown-Ultimo to Randwick through to Kogarah, Frenchs Forest in the north and Macquarie Park.

Eastern Economic Corridor
Corridor extends from Macquarie Park to Sydney Airport.



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 7: Eastern Harbour City

Urban renewal
Increased medium and high density developments..

Health & Education
Growth will be focused along the Eastern Economic Corridor.

Transport
Sydney Metro Northwest rail link
Sydney Metro City & Southwest rail link
South East Light rail



Greater Sydney: Greater Growth

Greater Sydney Districts

The GSRP 2018, divides Greater Sydney into five districts to manage and achieve the goals of the plan. Each district comprises the following local government areas (LGA):

Central City

Comprises LGA's of Blacktown, Cumberland, Parramatta and The Hills.

Eastern City

Comprises LGA's of Bayside, Burwood, Canada Bay, City of Sydney, Inner West, Randwick, Strathfield, Waverley, Woollahra.

North

Comprises LGA's of Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches, Ryde, Willoughby.

South

Comprises LGA's of Canterbury-Bankstown, Georges River, Sutherland.

Western City

Comprises LGA's of Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith, Wollondilly.



Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

Figure 8: Greater Sydney Region: Local Government Areas (LGA's)

Our next newsletter will give a detailed insight into the Central City district, and will examine how the region is expected to grow by 2036.

If you would like more information about this article or need to discuss your health project please contact:

Dean Crozier
dean.c@healthprojectservices.com.au

www.healthprojectservices.com.au

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