



# HPS Outlook

Central City District

SEPTEMBER 2020



HEALTH PROJECT SERVICES

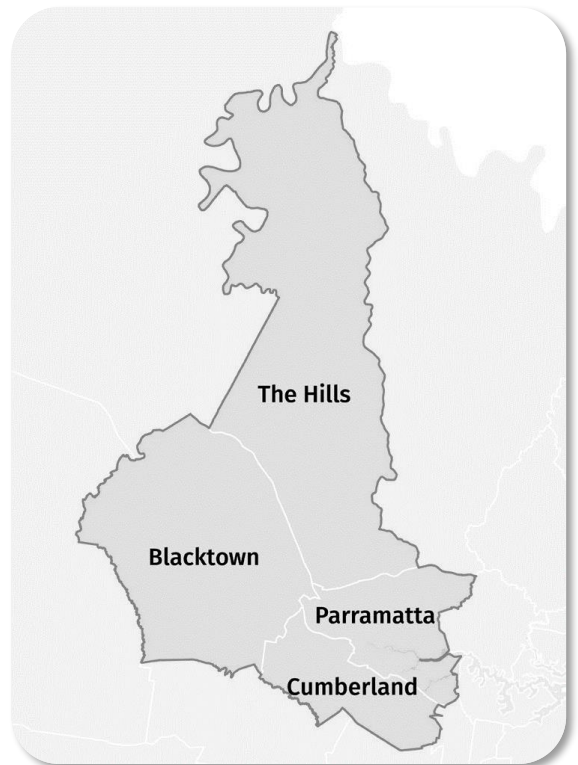
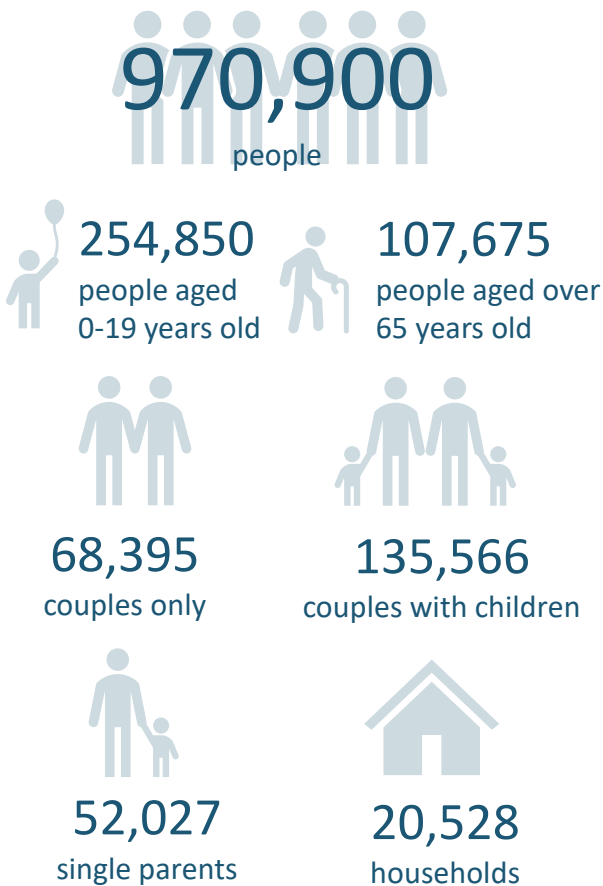
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# Central City District

The Central City District will play an important role in achieving the goals within the over arching Greater Sydney Region Plan to support population and economic growth in the coming decades. Greater Parramatta and more specifically Parramatta CBD will be the focal hub for the district to generate employment opportunities leading to rising population and greater housing demand. The Plan seeks to maximise land use surrounding existing and new infrastructure to achieve long term goals.

The region includes the local government areas (LGA's) of The Hills, Blacktown, Parramatta and Cumberland.

## Demographic Snapshot



Source: Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 1: Central City District**

Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities and ABS Census of Population and Housing 2016, Cat No. 2001.0

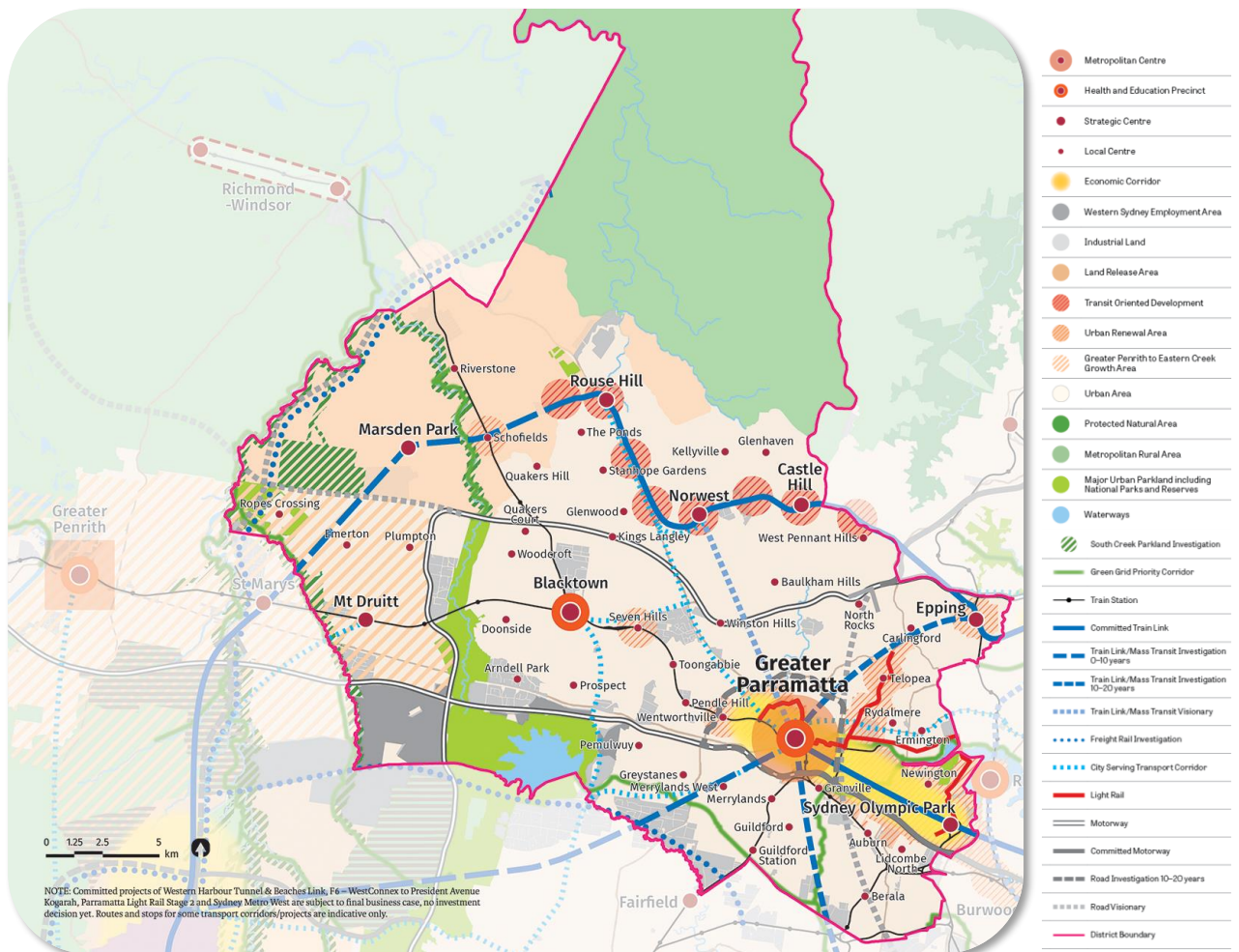


## Central City District

In addition to Greater Parramatta other areas have been earmarked to support future growth across the Central City District. The Greater Sydney Commission have identified Strategic Centres which have been chosen based on various factors including but not limited to; economic prospects, employment potential, services, housing supply and development opportunity for the community over the next 20 years.

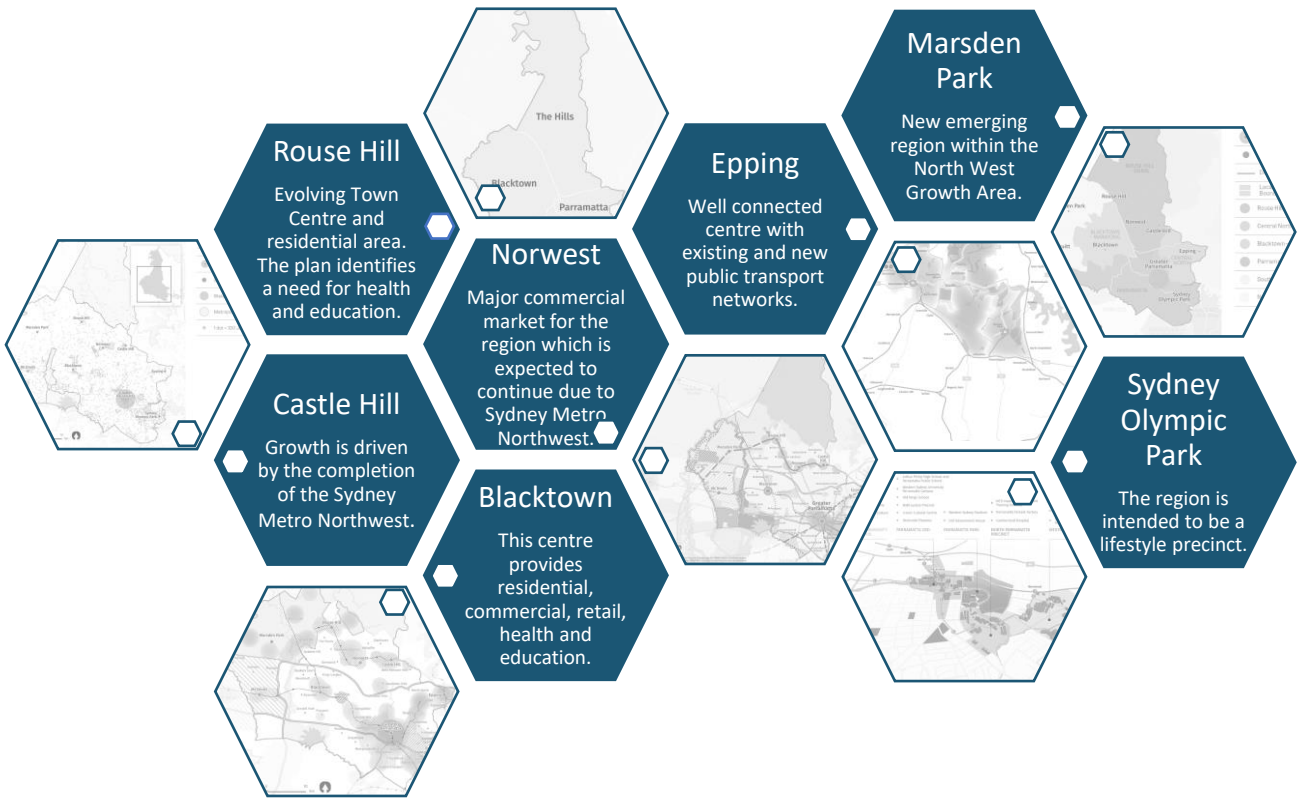
As shown in the Central City District Structure Plan below, the Strategic Centres include Blacktown, Castle Hill, Epping, Marsden Park, Mount Druitt, Norwest, Rouse Hill and Sydney Olympic Park. Investment will be focused on these Strategic Centres as major workforce zones, with each centre assigned a job target to reach by 2036 for future residents.

Over the next 20 years  
Central City District will  
be the most popular  
region generating  
expected demand for  
**207,500**  
additional dwellings.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

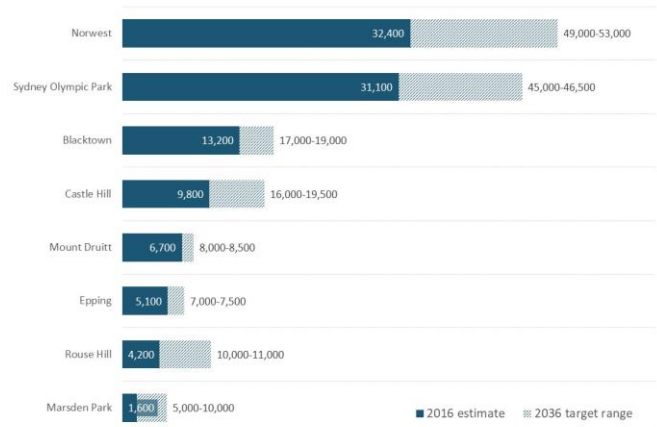
**Figure 2: Central City District Structure Plan**



The NSW government understands the importance of Strategic Centres, to support the local economy, new development, provide jobs for existing residents and entice new residents to the region. As Strategic Centres grow, existing service supply will need to meet growing demand.

Norwest and Sydney Olympic Park Strategic Centres have the highest workforce population with over 31,000 workers each respectively. Looking ahead this trend is expected to continue with a baseline target of 49,000 jobs for Norwest and 45,000 jobs for Sydney Olympic Park by 2036. Blacktown and Castle Hill are assigned a baseline target of 16,000-17,000 jobs over the same period.

Over the next two decades there may be new opportunities created for health practitioners to expand or establish new practices within defined Strategic Centres as population grows and demand increases. Due to the level of development proposed for some region, consideration of new competitors entering the market will need to be assessed and how to mitigate risk associated with each new competitor.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 3: Central City District Strategic Centre Target Jobs by 2036**



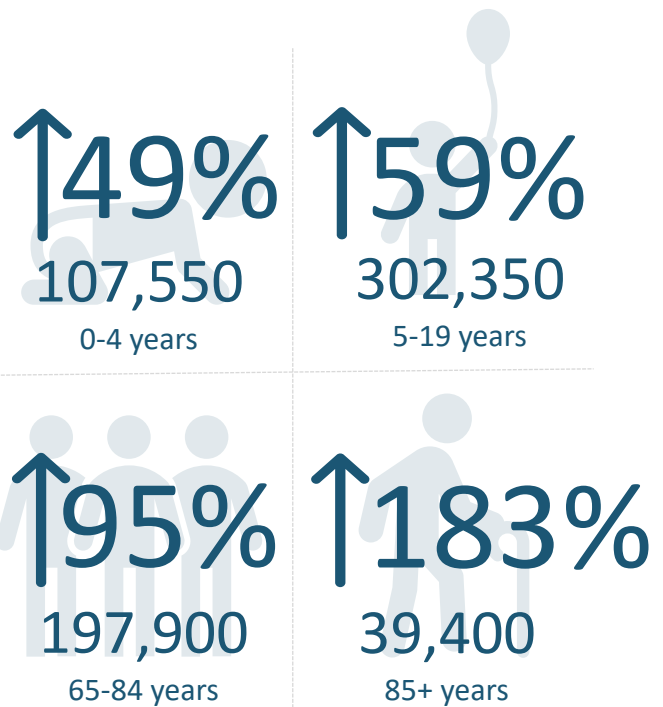
## Population

The total population across the Central City District is 971,000 people at as 2016. The *Central City District Plan* identifies almost half of residents (47%) were born overseas, and the most common languages spoken other than English are Arabic (11.8%), Mandarin (11.7%), Cantonese (7.5%) and Hindi (6.6%).

By 2036, the total population of the Central City District is forecast to reach over 1.5 million people. The region is forecast to record rapid growth in people aged 65 years and over during the next 20 years to represent over 235,000 people (or 16% of total population). In 2036, one in five people will be aged 5 to 19 years, while children aged 4 years or younger are projected to increase by 49% to 107,550 children.

According to the *Central City District Plan*, Parramatta LGA will be the largest source of population growth with almost 178,000 new residents, followed by Blacktown LGA (172,400 new residents), The Hills LGA (125,350 new residents) and Cumberland LGA (75,000 new residents) by 2036.

The *Central City District Plan* highlights the need for integration of planning and co-location of infrastructure with services (such as healthcare) to deliver more accessible and viable mixed use neighbourhoods for residents. Location selection of any proposed health facility will be a fundamental element for underlying success and future growth. The majority of the population influx will likely settle in new land release areas and urban renewal areas. New housing supply is typically located within close proximity to new and existing transport corridors and employment hubs. This may result in a greater need for healthcare services within these neighbourhoods.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 4: Central City District population growth by age 2036**





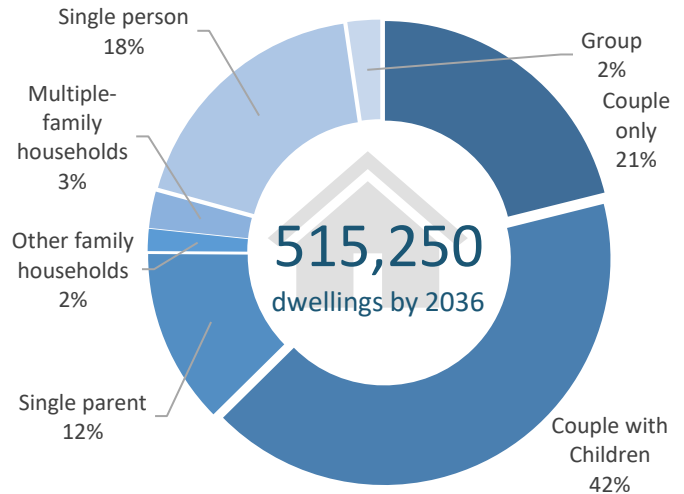
## Central City District

### Housing

Population growth and the goal of employment within 30 minutes of resident homes will see demand for housing across the Central City District increase. The Greater Sydney Commission estimate 28% (207,500 additional dwellings) of new dwellings across Greater Sydney will come from the Central City District over the next two decades.

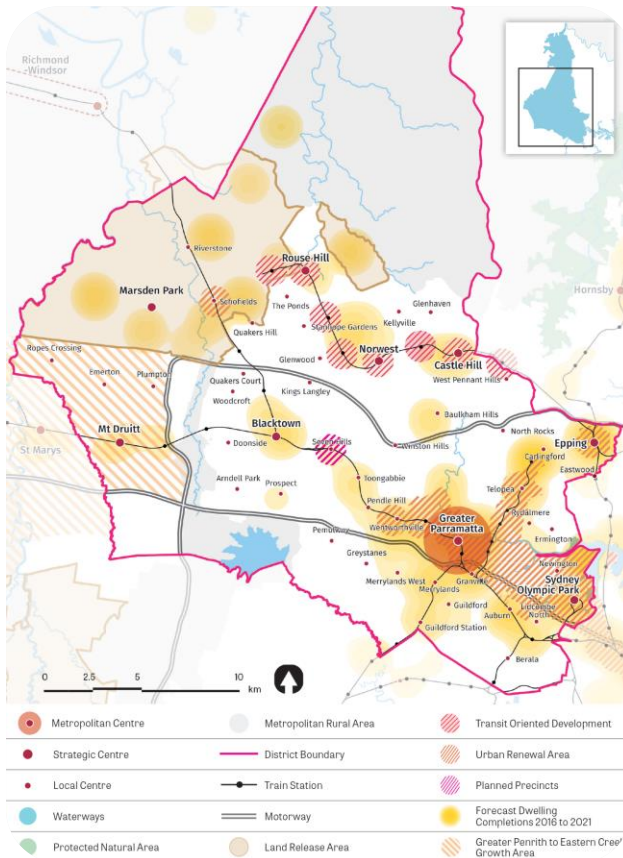
New dwelling supply will be sourced from new residential land release areas, urban renewal areas and redevelopment of existing sites (infill development) as shown in **Figure 5**. These locations may yield the highest opportunity for establishing a health facility in previously site constrained or under developed markets.

The type of dwellings is also an important factor as lifestyle changes are forecast to witness a higher proportion of single person households. In addition, an ageing population will place greater need on aged care facilities.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 6: Central City District projected household structure 2036**



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 5: Central City District future housing supply**

The Central City District Plan identifies housing to supply has progressed in the following areas:

- Greater Parramatta Growth Area comprising 12 precincts; Westmead, Parramatta North, Parramatta CBD, Harris Park, Camellia, Rydalmere, Carlingford Corridor, Silverwater, Sydney Olympic Park and Carter Street, Wentworth Point, Parramatta road and Homebush.
- Parramatta Road Urban Transformation Strategy which incorporates Granville and Auburn precincts.
- Sydney Metro Northwest Urban Renewal Corridor with Planned Precincts at Showground, Bella Vista Kellyville and Cudgegong Road.
- North West Growth Area which consists of Riverstone, Vineyard, Schofields, Marsden Park and Colebee.

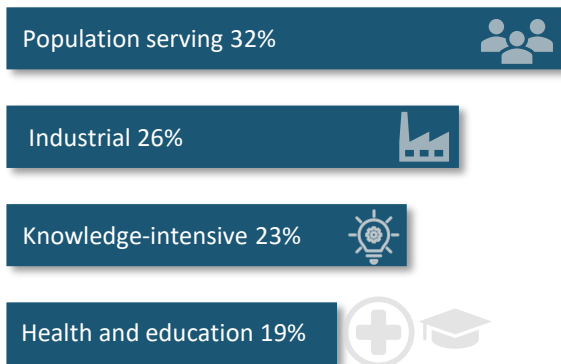
The *Central City District Plan* understands the need to provide a diverse mixture of affordable housing with accessibility to employment, social infrastructure, community facilities and public transport.



## Central City District

### Employment

The level of investment will boost job growth across the Central City District. Major infrastructure projects which will improve connectivity, accessibility and draw businesses and employees to the region. Predominately the jobs are concentrated in the Population Serving sector (32%) and just over a quarter are based in the Industrial sector and Health and Education represents 19%.

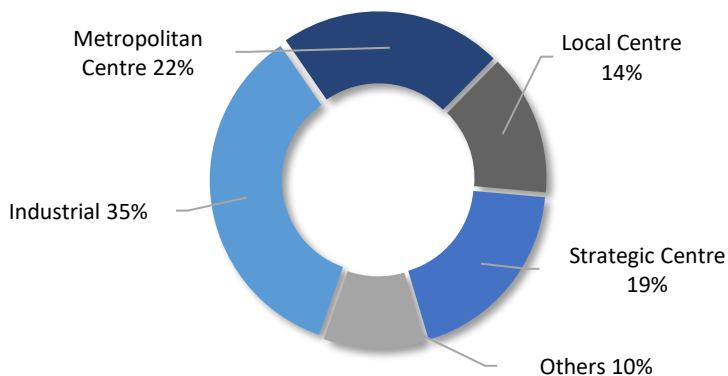


Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 7: Central City District jobs by sector 2016**

The State government are maximising new and existing infrastructure to improve network connectivity and productivity for district.

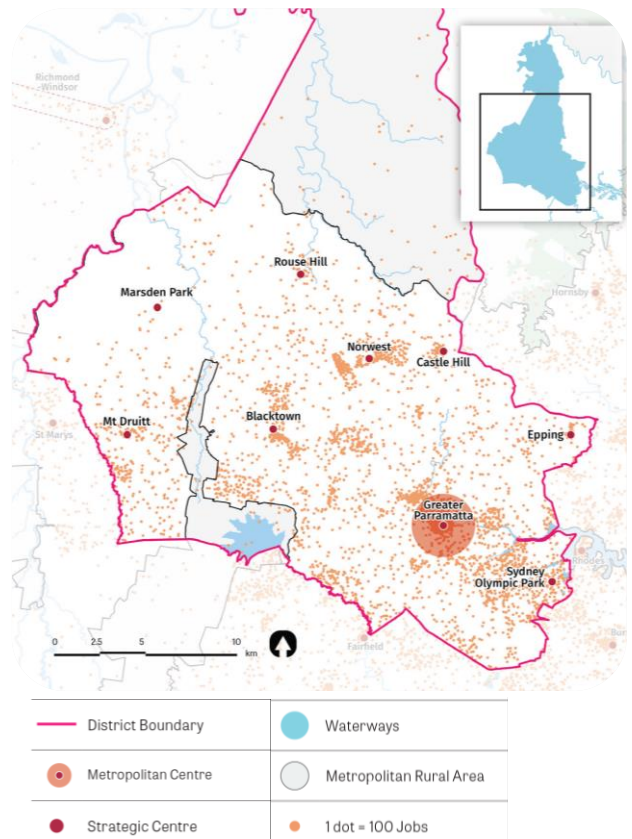
According to the *Central City District Plan* the majority of jobs are located in industrial locations within Central City District. This is to be expected given the supply of industrial land. It is worth noting, the *Central City District Plan* intends to transform traditional industrial into advanced manufacturing and innovation industries services to increase competitiveness and efficiency of the economy.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities

**Figure 8: Central City District job distribution by type of location**

Over one in three existing jobs in the region are located in Greater Parramatta, Sydney Olympic Park, Norwest and Blacktown. These areas will continue to be the main employment zones across the region going forward. Looking ahead, the Plan identifies the necessity to evolve the role of Strategic Centres to generate more job opportunities within 30 minutes radius of homes. Existing Strategic Centres are providing employment hubs including Castle Hill, Epping, Marsden Park, Mount Druitt, and Rouse Hill.



Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities







**Figure 9: Central City District job density**

Health and Education will continue to make a significant contribution to the economy with Westmead recognised as a major health precinct, and secondary health precincts located in Norwest and Blacktown.

The strategy aims to attract and relocate a more skilled workforce to the region. This may result in higher income levels allowing residents and workers to invest in private health insurance and health services.



## Central City District by LGA Overview

	Blacktown LGA	Cumberland LGA	Parramatta LGA	The Hills LGA
 Population projection increase to 2036 (no.)	172,400 additional people	75,000 additional people	177,900 additional people	125,350 additional people
 Projected population change 2016-2036 0-4 years	↑ 35%	↑ 23%	↑ 65%	↑ 62%
 Projected population change 2016-2036 5-19 years	↑ 48%	↑ 39%	↑ 92%	↑ 72%
 Projected population change 2016-2036 65-84 years	↑ 98%	↑ 61%	↑ 114%	↑ 103%
 Projected population change 2016-2036 85+ years	↑ 209%	↑ 101%	↑ 178%	↑ 285%
 Housing supply target 2016-2021	13,950 additional dwellings	9,350 additional dwellings	21,650 additional dwellings	8,550 additional dwellings

Source: Greater Sydney Commission, Our Greater Sydney 2056, Central City District Plan – connecting communities and NSW Department of Planning and Environment, 2016 New South Wales State and Local Government Area Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney





The Central City District is going to be experiencing growth in new land release areas, while some existing areas will welcome rejuvenation through urban renewal activity and redevelopment. Infrastructure will continue to attract investment and generate employment growth across the region over the next 20 years. The government will focus growth along existing and new transport corridors, major infrastructure, economic corridors and employment hubs.

Our next newsletter will examine how the South District is expected to grow by 2036. The South District comprises the LGA's of Canterbury-Bankstown, Georges River and Sutherland.



Source: Greater Sydney Commission, Our Greater Sydney 2056, South District Plan

**Figure 10: South District**

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