

HPS Outlook

South District Part 1

OCTOBER 2020



HEALTH PROJECT SERVICES

Research • Analysis • Strategy • Delivery

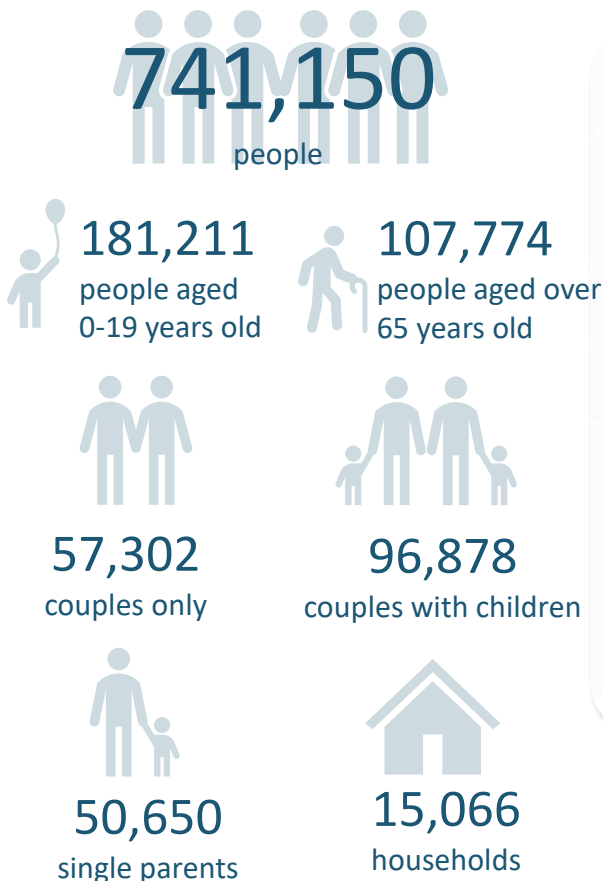
South District

Over the next 20 years, the South District will adopt a collaborative approach to achieve a more cohesive outcome that balances growth and demand with support through infrastructure and investment across the region. The government aims to improve connectivity and efficiency of existing industries, cater for expanding and emerging sectors to generate employment and ensure residents can live within 30 minutes of employment zones.

The South District Outlook has been divided into two parts due to initiatives in progress or planned for the region. Part two will focus on Collaboration Areas and Strategic Centres.

The region includes the local government areas (LGA's) of Canterbury-Bankstown, Georges River and Sutherland.

Demographic Snapshot



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

Figure 1: South District

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



The key visions for the South District will concentrate on:

Urban services land and freight routes

Close proximity to Sydney Airport, Port Botany, Illawarra and Port Kembla

Grow and develop



ANSTO*
Innovation Precinct



Health & Education Precincts



Strategic Centres



Bankstown Airport-
Milperra
Industrial Area

Improve connectivity to Parramatta, Liverpool and Western Sydney Airport

Balance social infrastructure and growth

*Australian Nuclear Science and Technology Organisation (ANSTO)

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

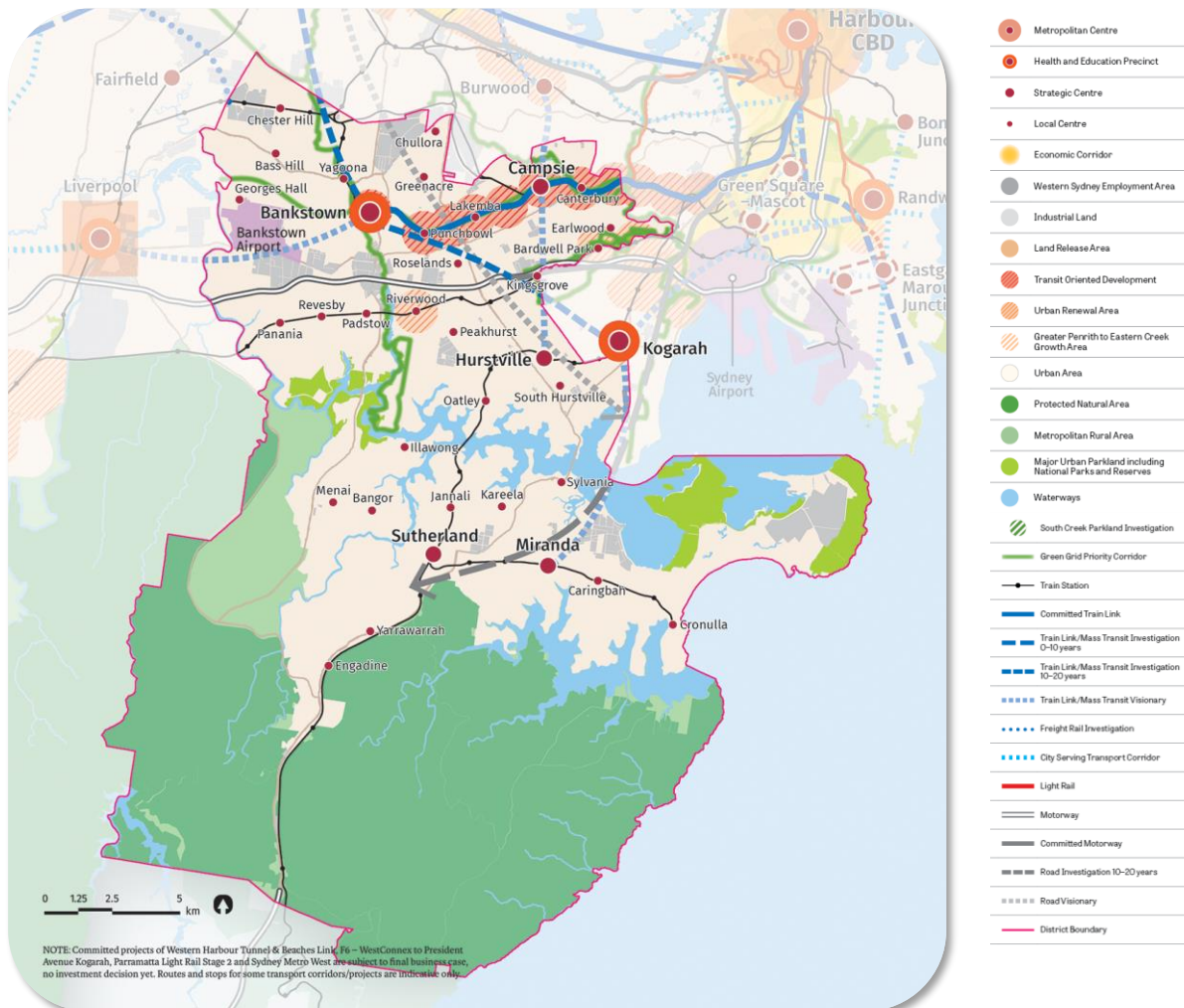


Collaboration Areas (focus on place-based planning) have been established in the South District based on the capability of the area to contribute to the District. These include the Australian Nuclear Science and Technology Organisation (ANSTO) innovation precinct, the Kogarah health and education precinct, Bankstown health and education precinct, Bankstown Airport and Milperra industrial area.

Additionally, Strategic Centres (shown below) will also be fundamental to supporting future growth through employment opportunities, housing supply, business investment and maximising infrastructure capacity.

Further information will be provided in Part 2 edition.

By 2036, the region will grow and create demand for
83,500
additional dwellings.



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

Figure 2: South District Structure Plan



Population

The South District region is expected to welcome over 200,000 additional residents over the next two decades, reaching almost 950,000 people. During this timeframe, the State Government anticipated a shift in the demographic profile, with a higher proportion of ageing population living in the region. This growing trend will result in a changing need for health-related services and may create an opportunity for existing health providers to expand or new operators to enter the market.

South District population forecast indicates people aged 65 years and over are projected to grow by 68,650 additional people. In comparison, young children aged four years or younger anticipated to increase by 9,300 children by 2036. The region is estimated to record over 40,000 additional children aged 5 to 19 years old generating demand for more services and social infrastructure to cater to this group.

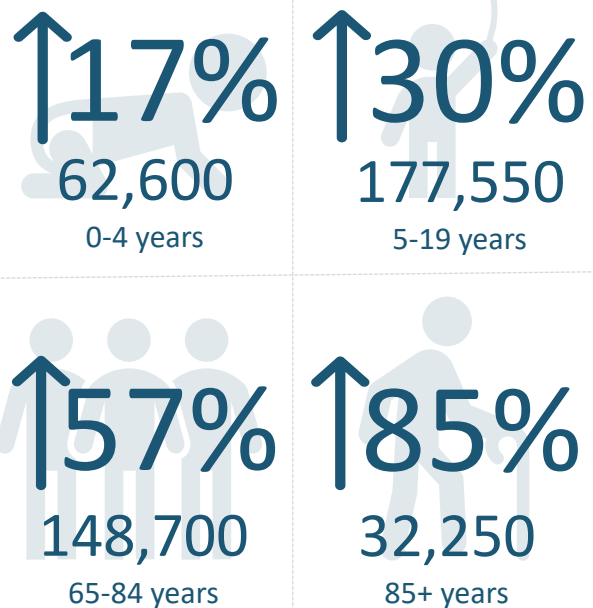
The majority of growth is earmarked to occur in Canterbury-Bankstown LGA, accounting for 70% of total population growth (142,450 additional people). Canterbury-Bankstown LGA may witness an increase in health-related services for children and child care as the area will absorb almost 90% of total forecast growth for children aged four years or younger for the South District. The ageing population is forecast to grow by 35,900 additional people and will place upward on existing services.

Across Sutherland LGA, the population will continue to age, with almost 19,500 additional people aged 65 years and over by 2036.

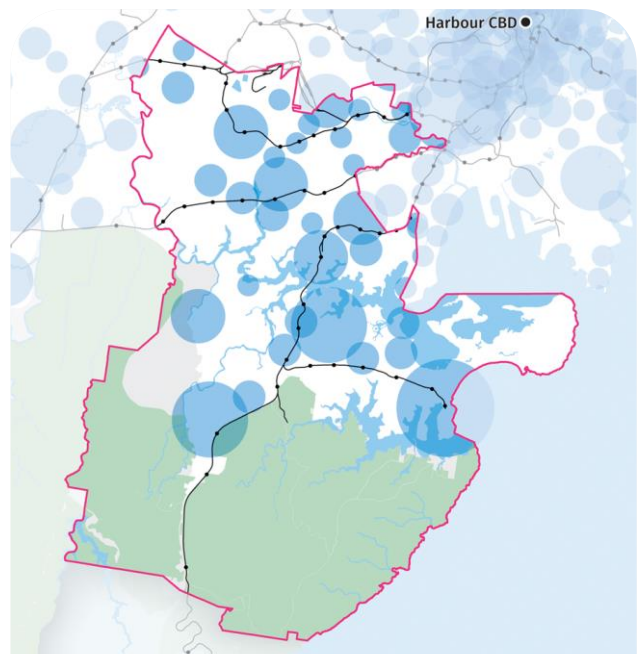
Population forecasts highlight the importance of providing health services and aged care for a growing ageing population.

Population growth throughout the District will likely settle in urban renewal areas such as the Sydenham to Bankstown Urban Renewal Corridor, land release areas and near Strategic Centres and Locals Centres that have accessibility to employment, services and transport.

Looking ahead, health service providers will need to understand the changing demographics of the local area to ensure commercial viability. Urban renewal areas may provide new opportunities in established markets for new operators.



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



● Social infrastructure includes facilities such as community and neighbourhood hubs, sportsfields, clubs and courts, men's sheds, pools and leisure centres

Source: Greater Sydney Commission, 2017 adapted from Greater Sydney's Social Capital Study (2017), Cred Consulting.

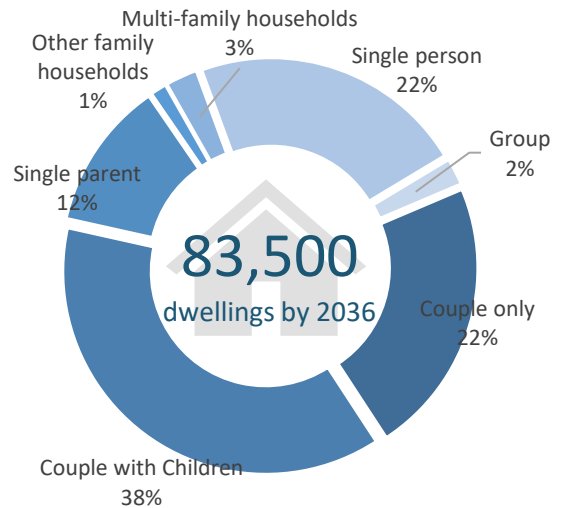
Figure 3: South District social infrastructure



Housing

By 2036, demand for housing is estimated to grow by a total of 83,500 additional dwellings to meet population needs. The South District Plan intends to provide the majority of new housing through urban renewal areas and infill developments in close proximity to new and existing infrastructure (refer to **Figure 4**). With population expected to relocate into these neighbourhoods and within 30 mins of employment there will be a greater emphasis on co-location of social infrastructure and mixed uses to service the increase in residents.

The role of housing across the District is also evolving in response to the changing demographic profile of residents, to accommodate the rising number of single parent, couple only households as well as the needs of an ageing population. By 2036, Couples with Children (38%) will account for the highest proportion of households. Diverse housing stock is required to deliver affordable and housing variety to improve community access based on price, design and location.



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

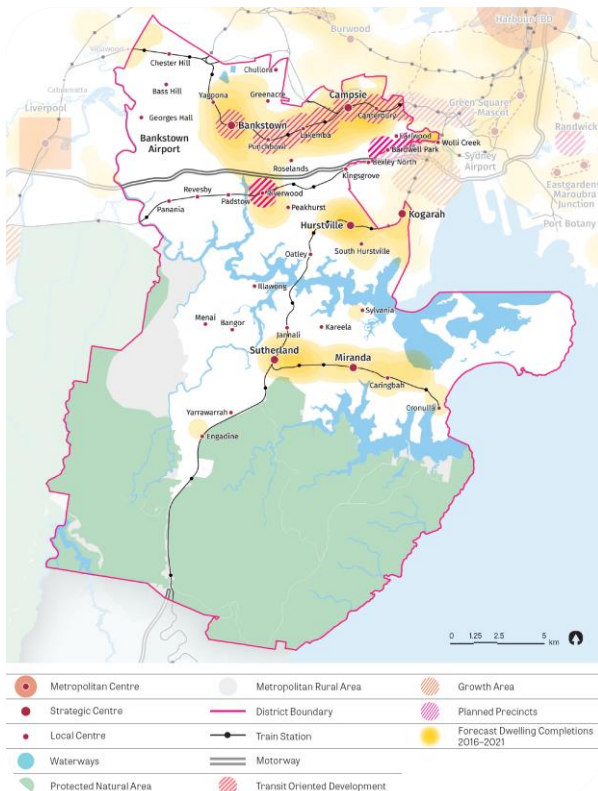
Figure 5: South District projected household structure 2036

Some of the most notable housing supply identified in the South District Plan includes:

- Sydenham to Bankstown Urban Renewal Corridor. This includes Planned Precincts for:
 - Belmore
 - Lakemba
 - Campsie
 - Canterbury
- Riverwood Planned Precinct and Communities Plus – Riverwood Estate State Significant Precinct
- Bardwell Park Planned Precinct

By 2021, the South District Plan established a five year housing target of 23,250 additional dwellings. Canterbury-Bankstown LGA is expected to contribute more than half with 13,250 additional dwellings, followed by Sutherland LGA (22.4%) and Georges River LGA (20.6%).

Key locations to consider for a new health practice will include Strategic Centres and Local Centres due to existing infrastructure, new development, mixed use services and employment. These centres are shown in **Figure 6**.

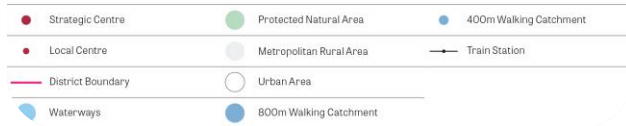
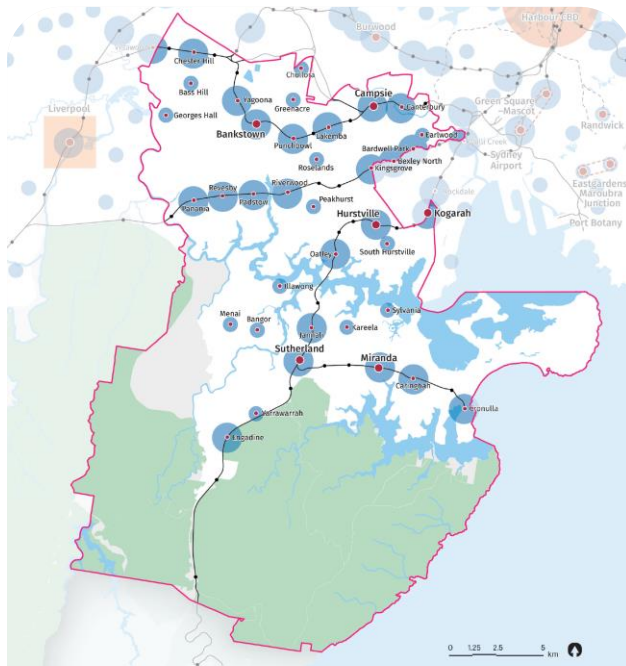


Source: Greater Sydney Commission, Our Greater Sydney 2056, South District Plan – connecting communities

Figure 4: South District future housing supply



South District



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

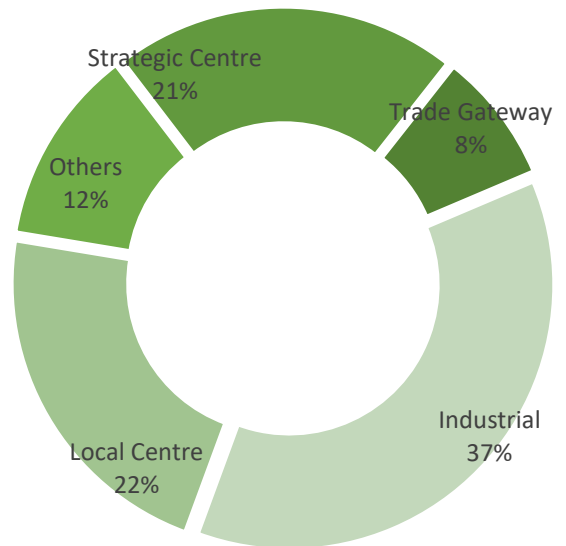
Figure 6: South District centres

Employment

The South District Plan focuses in improving connectivity to increase productivity and attract skilled workers to the region. According to the Plan, greater Integration of employment opportunities with new and existing infrastructure will boost the local economy providing more cost benefits and generate jobs.

According to the South District Plan, the Population Serving is the largest industry with over one third of the labour force employed in this sector. The Population Serving sector comprises retail and construction and is commonly found in the suburbs of Bankstown, Campsie, Hurstville, Miranda and Sutherland.

In comparison the Health and Education sector accounts for almost one quarter of employment across the South District. The importance of this growing this sector for the local economy is further reinforced by the waning industrial sector over recent years.



Source: Greater Sydney Commission, Our Greater Sydney 2056, South District Plan – connecting communities and ABS, Census 2016

Figure 7: South District job distribution by type of location

Traditional industrial (manufacturing) in the region is transforming into advance manufacturing and innovation industries as well as warehouse distribution centres driven by the rapidly growing online retail sector. Milperra Industrial area is recognised as the main employment zone in the District.

The government also expects the District to benefit from the trade gateway opportunities provided by Bankstown Airport.

Key employment hubs in the South District include ANSTO (Lucas Heights), health and education precincts at Kogarah, Sutherland, Hurstville.

Population serving 36%



Health and education 24%



Industrial 21%



Knowledge-intensive 19%



Source: Greater Sydney Commission, Our Greater Sydney 2056, South District Plan – connecting communities and ABS, Census 2016

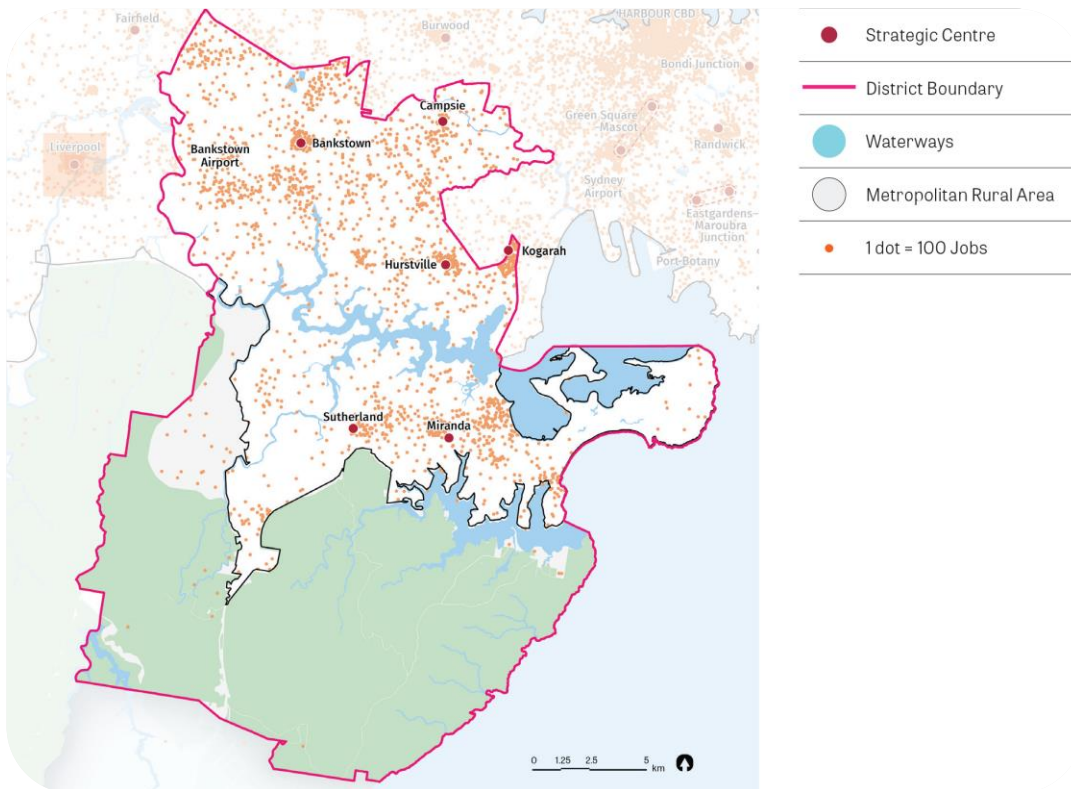
Figure 8: South District jobs by sector (2016)



Across the South District one in three jobs are based in Industrial areas, predominately located in Canterbury-Bankstown LGA and Kurnell. While Local Centres and Strategic Centres represent 22% and 21% respectively of all jobs. The Plan identifies a need to grow Strategic Centres, specifically concentrating on areas that provide good transport accessibility, development opportunities and a more convenient lifestyle for residents. Strategic Centres include Bankstown, Campsie, Hurstville, Kogarah, Miranda and Sutherland.

As growth occurs throughout Strategic Centres, opportunities may be unlocked for new health related services to be established (refer to **Figure 9**).

In conclusion, the South District Plan is a collaborative approach that will create more integrated communities through co-locating social infrastructure and services required to meet the demands of a changing demographic profile and maximise new and existing infrastructure.









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

Figure 9: South District job density



South District by LGA Overview

	Canterbury-Bankstown LGA	Georges River LGA	Sutherland LGA
 Population projection increase to 2036 (no.)	142,450 additional people	29,822 additional people*	32,351 additional people*
 Projected population change 2016-2036 0-4 years	↑29%	↑9%	↑2%
 Projected population change 2016-2036 5-19 years	↑43%	↑23%	↑13%
 Projected population change 2016-2036 65-84 years	↑68%	↑53%	↑44%
 Projected population change 2016-2036 85+ years	↑85%	↑76%	↑91%
 Housing supply target 2016-2021	13,250 additional dwellings	4,800 additional dwellings	5,200 additional dwellings

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

Our next newsletter HPS Outlook South District Part 2 will take a closer look at Collaboration Areas and Strategic Centres in the South District.

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

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