

# HPS Outlook

Eastern City District Part 1

APRIL 2021



HEALTH PROJECT SERVICES

Research • Analysis • Strategy • Delivery

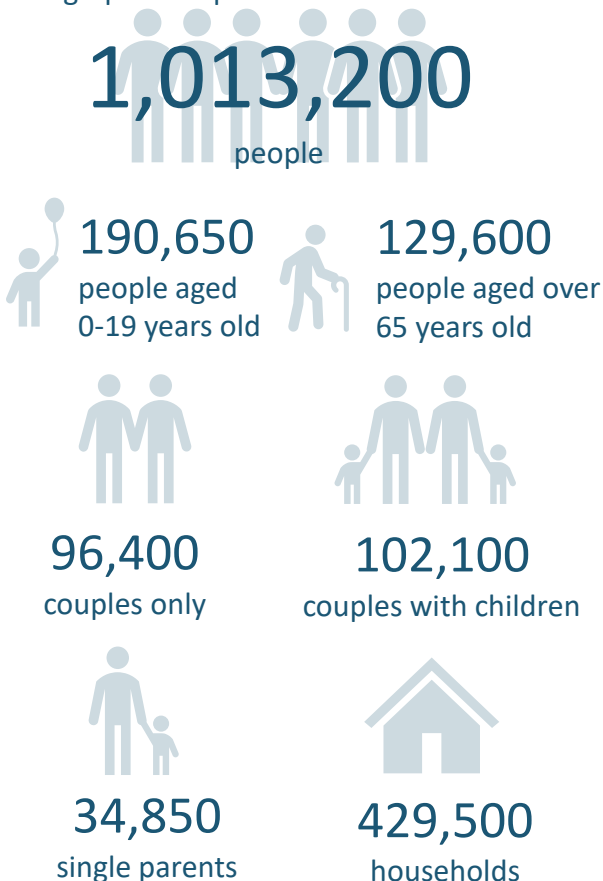
# Eastern City District Part 1

Over the next 20 years, the East City District Plan will support growth with infrastructure to improve the economic performance by increasing competitiveness. The plan aims to provide housing in supported locations, improve employment opportunities and grow health and education precincts and strategic centres throughout the district.

The Eastern City 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 across the district.

The region includes the local government areas (LGA's) of Bayside, Burwood, Canada Bay, City of Sydney, Inner West, Randwick, Strathfield, Waverley and Woollahra.

## Demographic Snapshot



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

Figure 1: Eastern City District

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

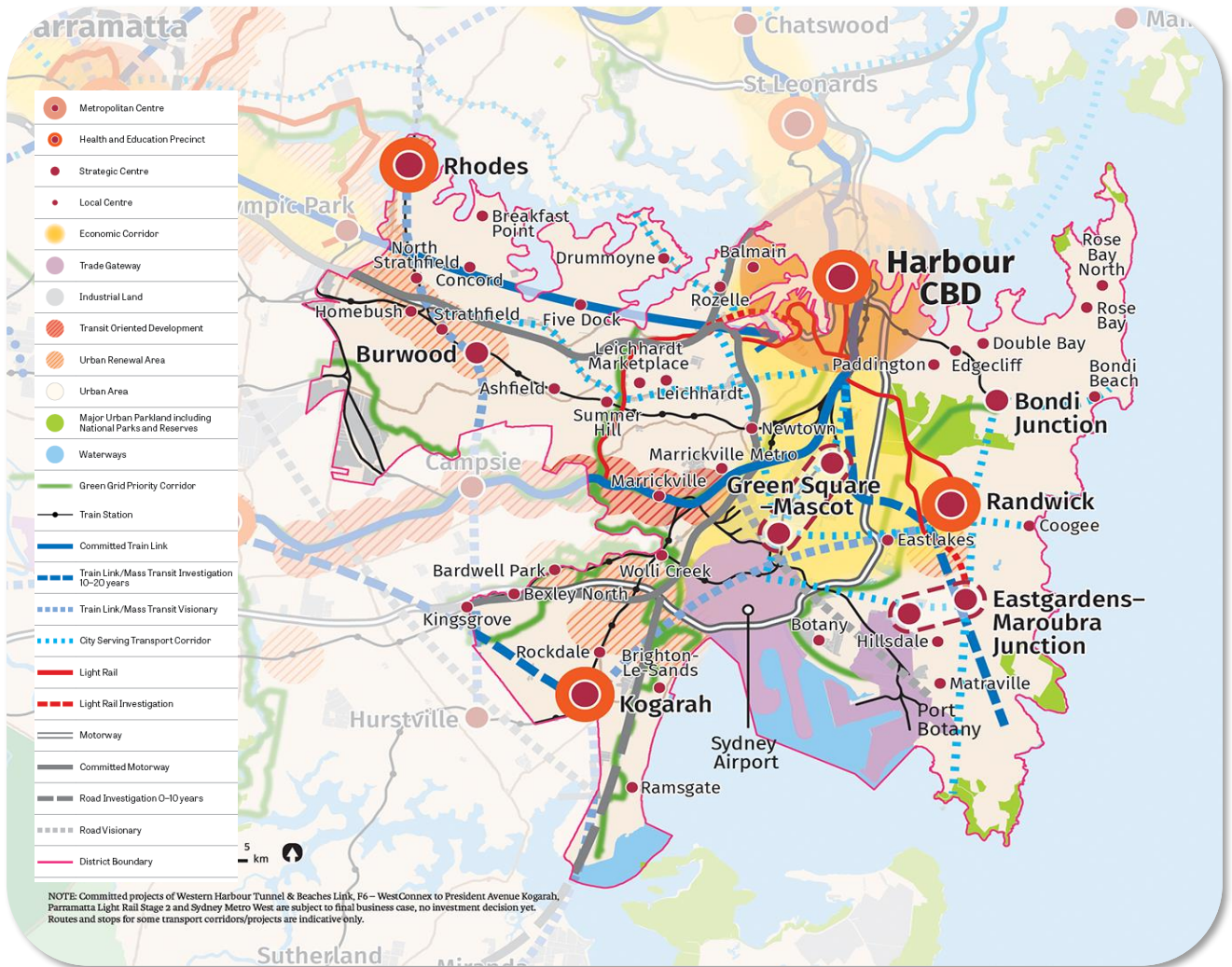
# Eastern City District Part 1

Collaboration Areas (focus on place-based planning) have been established in the Eastern City District based on the capability of the area to contribute to the District. The Plan identifies:

- Camperdown-Ultimo health and education precinct
- Randwick health and education precinct
- Rhodes East.

Further information will be provided in HPS Outlook Eastern City District Part 2 edition.

Over the next 20 years Eastern City District will generate expected demand for **157,500** additional dwellings.



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

Figure 2: Eastern City District Structure Plan



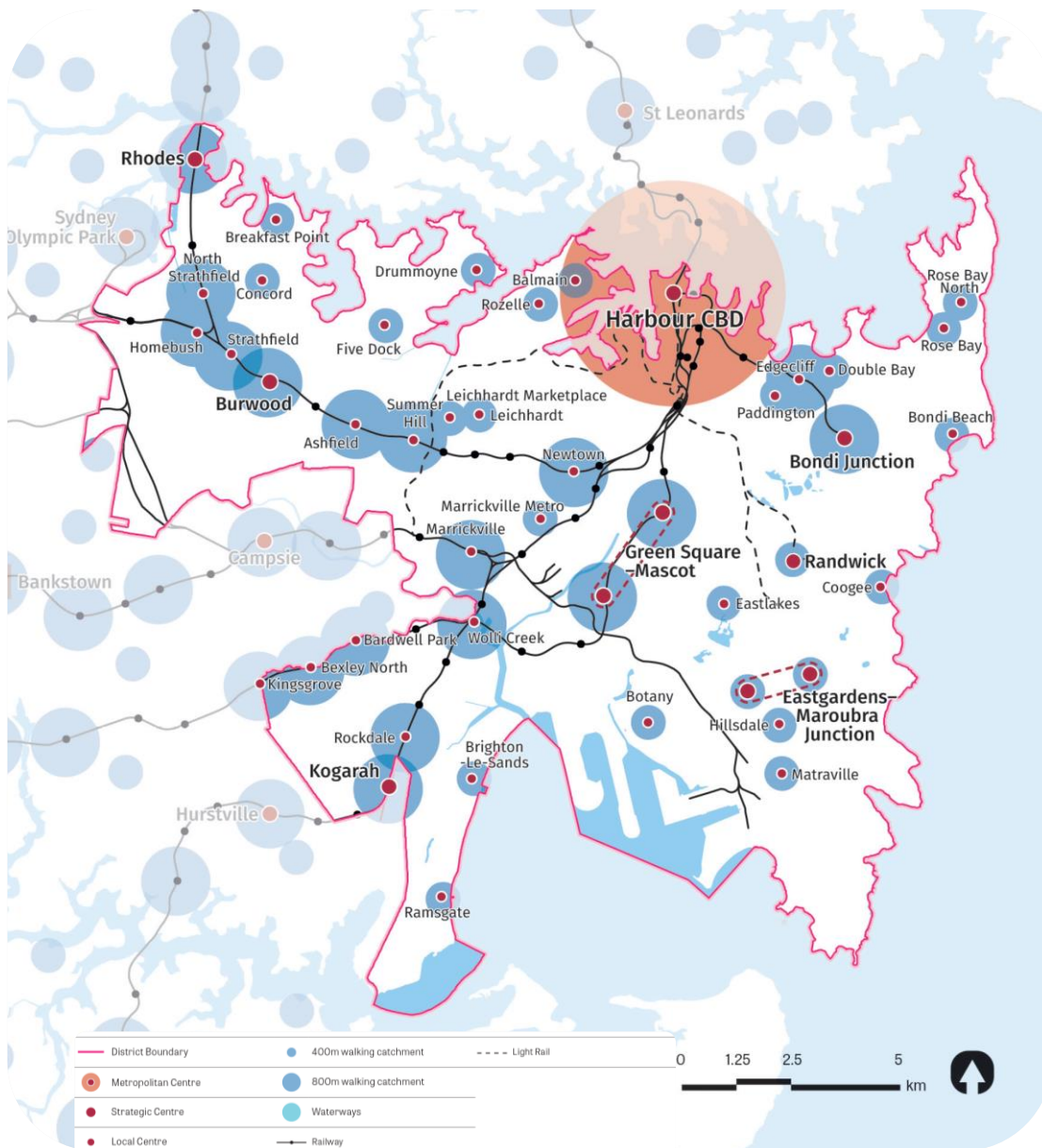


## Eastern City District Part 1

Additionally, Strategic Centres (shown below) will also be fundamental to supporting future growth through employment opportunities, housing supply, business investment and maximising infrastructure capacity. Co-location of social infrastructure will be encouraged in strategic centres concentrated along the economic corridor.

Strategic centres include:

- Bondi Junction
- Burwood
- Eastgardens-Maroubra Junction
- Green Square-Mascot
- Rhodes
- Kogarah



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

**Figure 3: Eastern City District centres**



## Eastern City District Part 1

### Population

Currently 1.013 million people live in the Eastern City District, with almost half of residents (47%) from overseas. The most common countries include China, England, New Zealand, India and Italy.

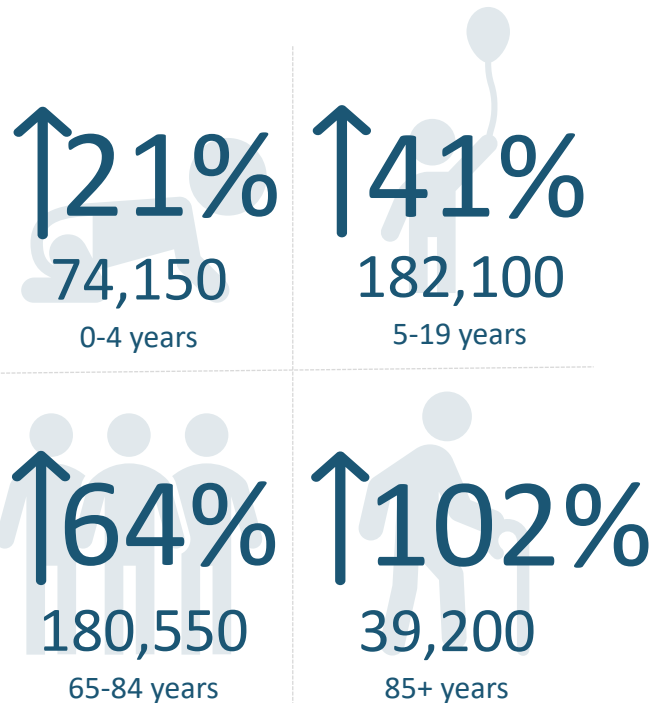
Over the next two decades, the Eastern City District is estimated to accommodate 325,000 new residents, with the total population to reach almost 1.34 million people by 2036. The majority of growth will be recorded in City of Sydney with almost one third of new residents to reside here due to urban renewal activity.

Across the Eastern City District, the population is expected to witness growth of 70% in people aged 65 years and over. This will likely place pressure on existing services for this age group and may unlock opportunities in established markets for new health operators.

The number of children aged four years or younger in the Eastern City District is forecast to rise by 20% by 2036. One in three children will grow up in City of Sydney (33%), followed by Bayside (25%) and Canada Bay (10%) and Inner West (10%). In comparison, Woollahra and Waverley are expected to record a decline of 10% and 6% respectively.

By 2036, people aged 65 years and over will account for 16% of total population. The areas anticipated to witness the highest growth are Bayside, Burwood, Strathfield and City of Sydney LGA's. The need for social infrastructure in these region will grow inline with population as existing services become strained from additional demand.

Population growth will settle in locations earmarked for new housing such as urban renewal corridors which include Sydenham-Bankstown, Parramatta Road and Redfern to Eveleigh as well as Bayside West Precincts and The Bays. These areas may see a rise in demand for new health related services as people relocate to the region.



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

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





## Eastern City District Part 1

### Housing

By 2036, population growth across the Eastern City District will create demand for an additional 157,500 dwellings. New housing will be concentrated in communities which provide public transport, community facilities, accessibility to goods and services.

In 2036, the region is expected to have almost 575,000 households, with more than one third being single person only households. These households will mainly be located in City of Sydney and Waverley LGA's. Couples with children households will account for 23% followed by couple only with 21%.

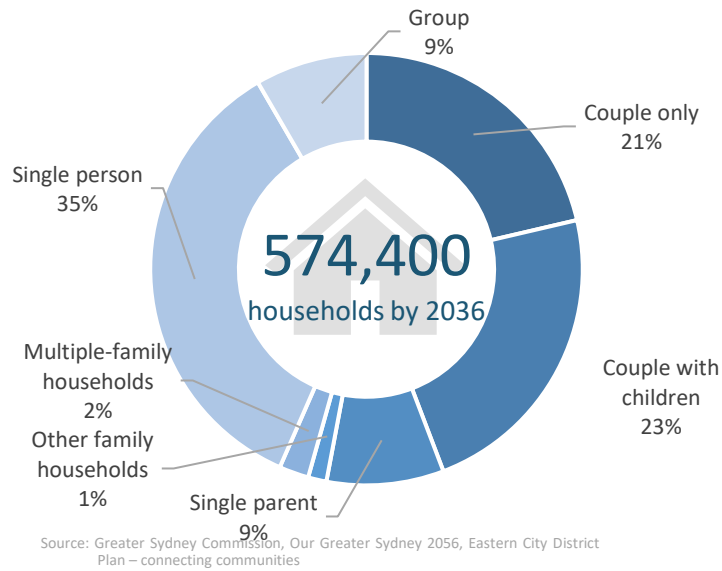
The Plan has identified five housing market demand areas comprising:

- City and Habourside
- Eastern Shore
- Inner West-Marrickville
- Inner West-Burwood
- St George



Source: Greater Sydney Commission, Our Greater Sydney 2056, Eastern City District Plan – connecting communities. Greater Sydney Commission, 2016 adapted from Implementing metropolitan planning strategies: taking into account local housing demand.

**Figure 5: Eastern City District housing market demand areas**



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

According to the *Eastern City District Plan* 78% of dwellings are apartments or medium density housing and this trend will likely continue as urban renewal areas are activated and increase supply. The Plan identifies the following projects to provide short term housing supply injection:

- Ashmore Precinct, Erskineville
- Harold Park, Annandale
- Green Square, Alexandria
- Little Bay Cove, Little Bay.





## Eastern City District Part 1

### Housing

Other areas identified (planned or in progress) with initiatives across the district to provide housing include:

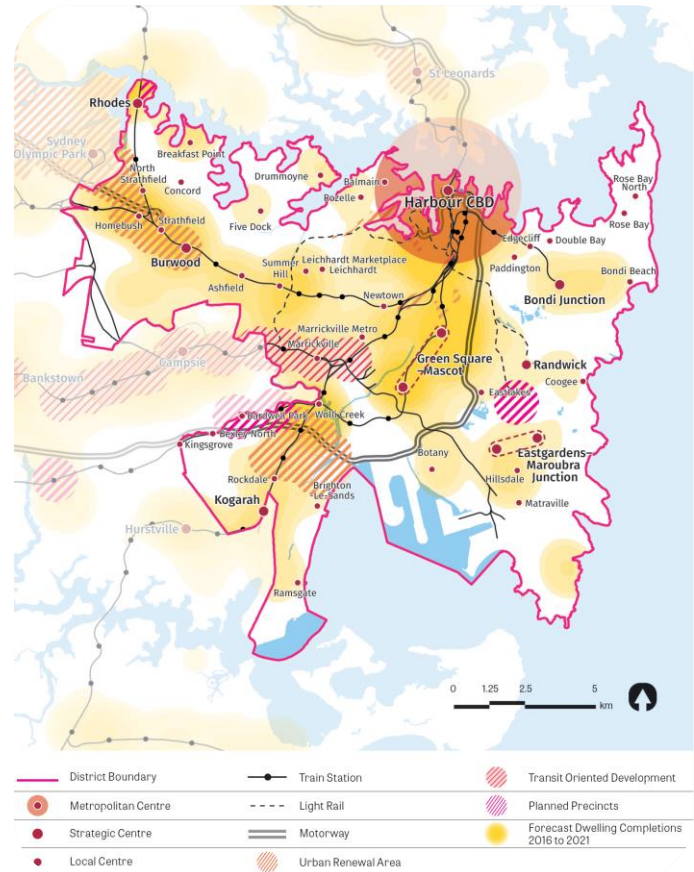
- Redfern to Eveleigh Urban Transformation
- The Sydenham to Bankstown Urban Renewal Corridor
- Parramatta Road Corridor Urban Transformation Strategy
- Bayside West Precincts
- The Bays Precinct Transformation Plan
- Planned Precincts:
  - Rhodes East
  - Burwood, Strathfield and Homebush
  - Turrella
  - Bardwell Park
  - Anzac Parade Corridor
- Communities Plus:
  - Waterloo
  - Redfern
  - Arncliffe.

In addition, the Plan recognises other opportunities may need further investigation including:

- Urban renewal to maximise infrastructure to Malabar, Maroubra, La Perouse and Port Botany.

Major infrastructure projects such as Sydney Metro City & Southwest, WestConnex, CBD and South East Light Rail will be a driver for urban renewal activity. New opportunities may be created in areas experiencing a transformation phase.

Over the five years to 2021, the majority of new housing supply target is forecast to be sourced from City of Sydney (18,300 dwelling target) followed by Bayside (10,150 dwelling target).



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

**Figure 7: Eastern City District future housing supply**

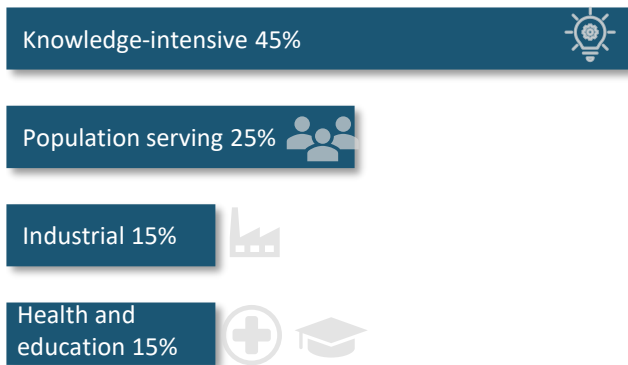
*HPS work with you at every stage of your healthcare project from conception to completion to ensure a successful outcome.*



## Eastern City District Part 1

### Employment

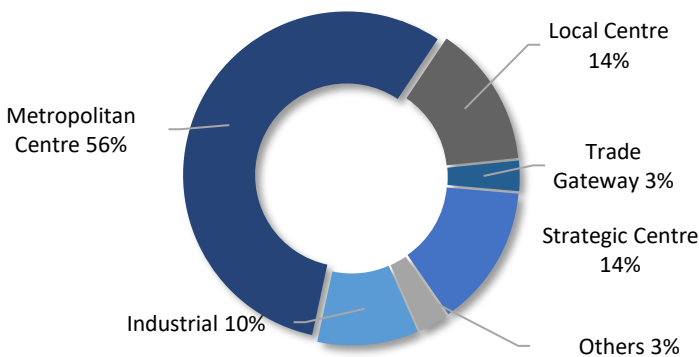
The knowledge-intensive sector is the largest employer in the Eastern District with 45% of all jobs. One in four jobs is based in the population serving industry, while health and education and industrial sectors account for 15% each respectively.



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

**Figure 8: Eastern City District jobs by sector 2016**

More than half of jobs are based in Metropolitan Centres (56%), the largest being Sydney CBD, followed by Local Centres (14%) and Strategic Centres (14%).



Source: Greater Sydney Commission, Our Greater Sydney 2056, Eastern City District Plan – connecting communities and ABS Census 2011

**Figure 9: Eastern City District job distribution by type of location**



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

**Figure 10: Eastern City District job density**

The Plan (pg. 56) stipulates Planning Priorities for the district as:

- Growing a stronger and more competitive Harbour CBD
- Growing and investing in health and education precincts and the innovation corridor
- Growing international trade gateways
- Delivering integrated land use and transport planning and a 30-minute city
- Growing investment, business opportunities and jobs in strategic centres
- Retaining and managing industrial and urban services land
- Supporting growth of targeted industry sectors.





## Eastern City District Part 1

# Eastern City District by LGA Overview

	Population projection change 2016-2036				Housing supply target 2016-2021
	0-4 years	5-19 years	65-84 years	85+ years	
<b>Bayside LGA</b>	↑ 28%	↑ 46%	↑ 66%	↑ 104%	10,150 additional dwellings
<b>Burwood LGA</b>	↑ 51%	↑ 62%	↑ 75%	↑ 100%	2,600 additional dwellings
<b>Canada Bay LGA</b>	↑ 24%	↑ 40%	↑ 70%	↑ 95%	2,150 additional dwellings
<b>Inner West LGA</b>	↑ 9%	↑ 28%	↑ 55%	↑ 103%	5,900 additional dwellings
<b>Randwick LGA</b>	↑ 12%	↑ 33%	↑ 48%	↑ 74%	2,250 additional dwellings
<b>Strathfield LGA</b>	↑ 47%	↑ 66%	↑ 91%	↑ 131%	3,650 additional dwellings
<b>Sydney LGA</b>	↑ 49%	↑ 80%	↑ 108%	↑ 203%	18,300 additional dwellings
<b>Waverley LGA</b>	↓ -6%	↑ 20%	↑ 34%	↑ 59%	1,250 additional dwellings
<b>Woollahra LGA</b>	↓ -10%	↑ 7%	↑ 22%	↑ 68%	300 additional dwellings

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

Our next newsletter HPS Outlook Eastern City District Part 2 will take a closer look at collaboration areas and strategic centres in the Eastern City District.

[www.healthprojectservices.com.au](http://www.healthprojectservices.com.au)

DISCLAIMER: ©2021, Health Project Services. All rights reserved. In preparing this report Health Project Services, and its employees and contractors, have used information from publicly available material believed reliable and we have used reasonable endeavours to ensure its accuracy. However, we make no guarantee or accept responsibility for errors or misstatements. We have not independently verified the reliability, accuracy or completeness of the information. Projections and estimates are provided as opinions only. You should seek independent financial and legal advice and make your own assessment.