

The Future Series

# Sydney: a tale of three cities

**It's the big question – where do I ‘set up shop’? Not only do you want to find somewhere for the right now, but you want to find the perfect practice that will secure you into the future.**

When researching locations for your practice, there are many factors that may influence your decision. And we know that even just a glimpse into the - who, what, where, when and why of Sydney's population and their health needs, would make this process much easier. This article aims to arm you with the right information to ensure you have exactly what you need to take the next step in finding the ideal practice location for you.

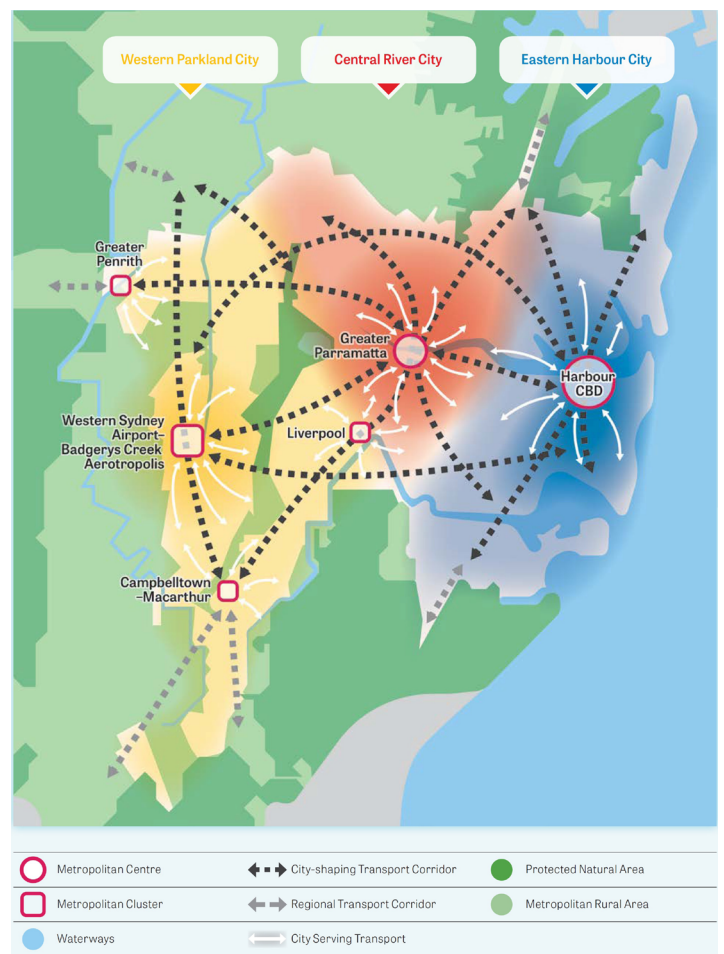
To make a start, we've undertaken a bit of navel gazing and looked into the future to see what Sydney might look like in years ahead.

In March 2018, the Greater Sydney Commission (a NSW Government funded organisation responsible for the planning of Greater Sydney) released a report stating that the Greater Sydney Region will become one of the fastest growing metropolises of the Western World. Most importantly, it will mature with three very different cities – each with its own challenges and opportunities. They are:

- **The Western Sydney Parkland City,**
- **The Central River City, and**
- **The Eastern Harbour City.**

These three city hubs will ensure residents will live within 30 minutes of their place of work, education, major retailers and health services.

This will be the first of a few articles focusing on the future of our city and its outer regions. This will be followed by more detailed articles looking into each city, local government Area (LGA), and draw on patient demographics and other key factors such as the future of the health industry, particularly primary health and health workforce issues. All with a view to help you future proof your business.



**Figure 1: Sydney 2056**

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

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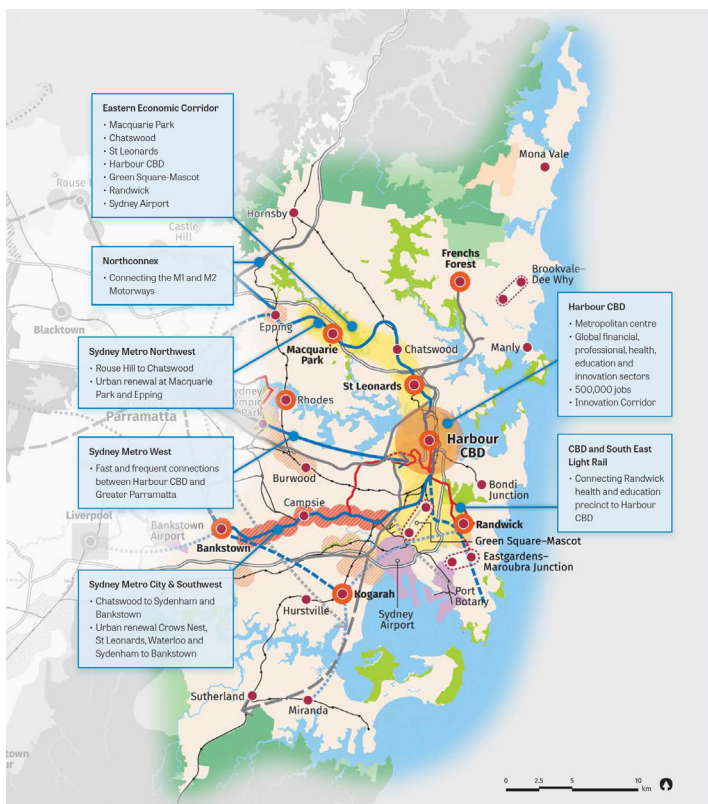


## Eastern Harbour City

The Eastern Harbour City, flagged as Australia's global gateway and financial capital, encompasses the eastern side of Sydney and Sydney CBD. With a population of 2.4 million in 2016, it is expected that it will grow to 3.3 million people by 2036. The Eastern Harbour City will consist of long standing communities including suburban neighbourhoods to highly urban areas. Residents will live in urban residential developments built around major centres and transport nodes.

The NSW Government have identified the Eastern Economic Corridor, extending from Macquarie Park to Sydney Airport, as the focal area for growth across financial, professional, health, education and innovation sectors. An Innovation Corridor, comprising of universities, international innovation companies and start-ups, will be located from Camperdown-Ultimo to Randwick through to Kogarah in the south to Macquarie Park and Frenchs Forest in the north.

Transport will be the key to this area's development and liveability, with a view to improve accessibility, ease congestion and increase connectivity to Sydney CBD. Transport infrastructure projects will be undertaken to include the Sydney Metro Northwest rail link connecting Rouse Hill to Chatswood, Sydney Metro City & Southwest rail link that connects Chatswood to Sydenham-Bankstown, Sydney Metro West. This will improve travel times and services to Greater Parramatta and South East Light Rail that connects Sydney CBD to Randwick.

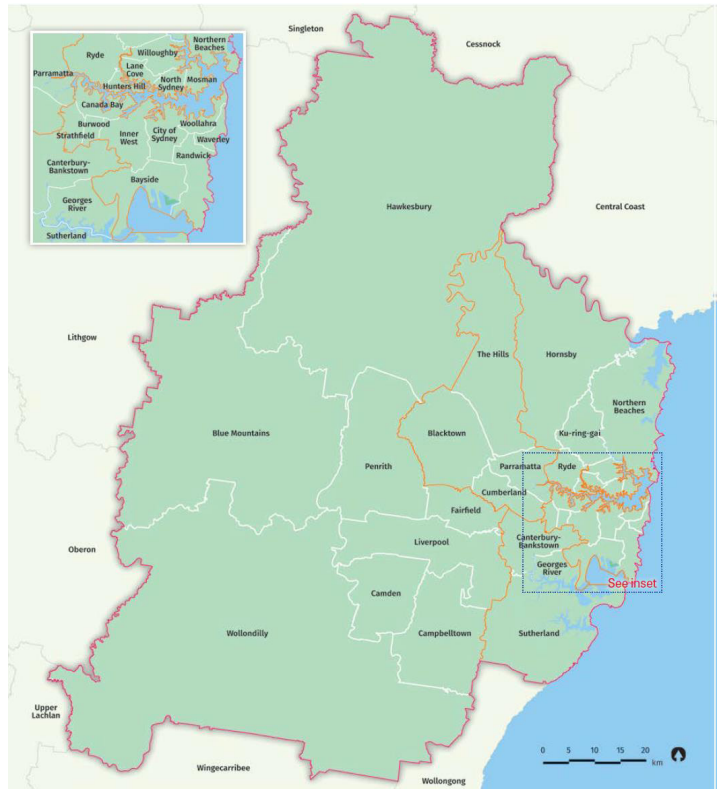


**Figure 4: Eastern Harbour City**  
Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

## Local Government Areas: divide by five

To achieve the overarching goals of the Greater Sydney Regional Plan 2018 A Metropolis of Three Cities, the Commission has further subdivided Greater Sydney area into five districts (based on LGAs), as defined below:

District	LGAs
<b>Central City</b>	Blacktown, Cumberland, Parramatta, The Hills
<b>Eastern City</b>	Bayside, Burwood, Canada Bay, City of Sydney, Inner West, Randwick, Strathfield, Waverley, Woollahra
<b>North</b>	Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches, Ryde, Willoughby
<b>South</b>	Canterbury-Bankstown, Georges River, Sutherland
<b>Western City</b>	Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith, Wollondilly



**DISTRICTS**

- Central City** Blacktown, Cumberland, Parramatta, The Hills
- Eastern City** Bayside, Burwood, Canada Bay, City of Sydney, Inner West, Randwick, Strathfield, Waverley, Woollahra
- North** Hornsby, Hunter's Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches, Ryde, Willoughby
- South** Canterbury-Bankstown, Georges River, Sutherland
- Western City** Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith, Wollondilly

**Figure 5: Greater Sydney Region: Local Government Areas**  
Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities

To provide a snapshot of the future for each district, the Greater Sydney Commission has used ABS statistics (Census of Population and Housing 2016) to analyse current populations. Over the past decade, Central City has recorded the highest increase in population growing by almost 195,000 people to 970,990 in 2016. Western City has the largest population size with almost 1.70 million residents, followed by Eastern City with 1.01 million people. The North district has the highest number of people aged 65 years and older with 136,964 residents. In contrast, the Western City district has the greatest concentration of youth with 286,548 people aged 19 years or younger as at 2016 census.

Across most districts, households consist of couples with children, the exception being the Eastern City district which has a high number of single person households. At the same time, there are a comparatively higher number of multi-family households in Central City and Western City districts. Interestingly the Western City district is the main provider for social housing with a total of 23,376 households; this is followed by Eastern City (21,953 households) while North is considerably lower at 5,873 households.

Most households in Eastern City, South, Central City and Western City earn \$2 000 to \$2 999 per week. Higher income households are located primarily in the North

District, with 22% of households earning more than \$4,000 per week. This is followed by Eastern City with 16.7%, Central City with 10.7%, South with 10.4% and Western City with 8.5% of households earning more than \$4,000 per week.

Below is a table containing a breakdown of some of the more interesting population statistics. We will delve further into each district and reflect on what it could mean for your practice in the next few articles.

	Eastern City	North	South	Central City	Western City
<b>Population</b>					
<b>2006</b>	841,577	775,317	652,934	776,231	907,512
<b>2011</b>	922,900	832,750	697,950	866,450	966,300
<b>2016</b>	1,013,200	886,600	741,150	970,900	1,069,950
<b>Age Structure (as at 2016)</b>					
<b>0 to 4 years old</b>	51,287	50,474	47,157	70,088	71,977
<b>5 to 9 years old</b>	44,277	55,807	46,801	67,887	73,531
<b>10 to 19 years old</b>	82,240	101,566	87,253	116,875	141,040
<b>65 to 84 years old</b>	103,874	113,860	90,561	94,925	115,017
<b>85 years old and older</b>	18,576	23,104	17,213	12,750	14,131
<b>Growth in Dwellings</b>					
<b>2006</b>	373,859	318,288	241,164	263,055	313,065
<b>2011</b>	393,982	330,266	247,780	282,537	326,461
<b>2016</b>	432,847	342,310	259,737	320,279	356,142
<b>Household Structure (as at 2016)</b>					
<b>Couple only</b>	99,193	82,007	57,302	68,395	76,211
<b>Couple with children</b>	93,744	117,008	96,878	135,566	137,845
<b>Single parent</b>	29,857	25,848	29,748	36,622	51,097
<b>Single person</b>	110,088	72,171	50,650	52,027	62,314
<b>Other family household</b>	6,461	3,393	3,472	4,298	4,170
<b>Multi-family household</b>	31,954	34,590	48,293	73,536	83,335
<b>Group household</b>	99,485	26,817	19,309	27,944	16,120
<b>Social Housing Households (as at 2016)</b>					
<b>No. households</b>	21,953	5,873	15,066	20,518	23,376
<b>Weekly Household Income (as at 2016)</b>					
<b>Less than \$400</b>	5.7%	3.8%	5.8%	4.9%	5.8%
<b>\$400-\$799</b>	12.5%	10.9%	17.1%	14.1%	18.7%
<b>\$800-\$1,249</b>	11.8%	10.9%	15.1%	13.9%	17.0%
<b>\$1,250-\$1,999</b>	18.4%	17.2%	20.3%	21.3%	24.2%
<b>\$2,000-\$2,999</b>	20.5%	20.2%	20.6%	23.1%	24.2%
<b>\$3,000-\$3,999</b>	14.3%	14.9%	10.7%	11.9%	11.1%
<b>More than \$4,000</b>	16.7%	22.0%	10.4%	10.7%	8.5%
<b>Unemployment Rate (as at March 2017)</b>					
<b>Unemployment rate</b>	4.0%	4.0%	5.1%	5.6%	5.8%

Source: Greater Sydney Commission and ABS Census of Population and Housing 2016, Cat No. 2001.0

## 2036: The Vision for Health Services

**For General Practitioners**, new burgeoning suburbs will be located in the North West Growth and South West Growth Areas of Sydney. These regions may provide new opportunities to establish a medical centre with low competition levels, coupled with strong population growth.

**For Dental Practitioners**, greater demand may be found servicing the patient profile of children aged 19 years and under, which represent more than a quarter of population in Central River City (27%) and Western Park City (28%) in 2016 and 2036 projections. In established suburbs, more opportunities may exist in identified urban renewal areas due to increased medium and high density residential and mixed development.

**For Veterinary Professionals**, location will be an important factor. Over the next 20 years as the population grows, demand for housing will increase. In the Eastern Harbour City, the NSW Government anticipate the number of dwellings will increase by 44%, with a higher number of households; this may result in a rise in pet ownership, particularly in urban renewal areas.

**In Summary\*** with an ageing and increasing population health services, accessibility and integration will be a focal point. It is predicted that:

- 21% of all jobs in Greater Sydney will be in health and education sectors, up 19% from 2018.
- The Western Parkland and Central River cities will need to become age-friendly cities as the population will primarily comprise of those aged 65 years and over.
- Tailored services and infrastructure will be required so that people can age within their communities.
- Digital technologies, innovation and accessibility will be required to support the aged and their needs so that health and social services can be readily accessed from home.
- Major health hubs will be further developed in Westmead, Nepean, Campbelltown, Randwick and Northern Beaches.
- A greater number of opportunities for jobs and growth in additional services will be created.

## In Conclusion

Well there you have it; **three very different cities**, each with its own opportunities, risks and challenges for the future.

These outcomes prove there are many factors to consider when choosing the right location for buying a new practice or expanding an existing one. It is important to take the time to research your specific areas, get to know the demographics, understand how the government intends to shape the area, and determine if there are any negative factors that could potentially impact on the growth of your business. This due diligence process can offer huge potential now and in the future.

### Next time...

Our next article will focus on the Western City District comprising the LGAs:

- Blue Mountains,
- Camden,
- Campbelltown,
- Fairfield,
- Hawkesbury,
- Liverpool,
- Penrith,
- Wollondilly.

It will also provide in depth information at an LGA level for the district, to give a better understanding how each community may grow over the next two decades.

### Would you like more information about this article or need help researching your ideal location?

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\*Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, A Metropolis of Three Cities; <https://www.aihw.gov.au/reports/australias-health/australias-health-2016/contents/health-system>; <https://www.racgp.org.au/yourracgp/news/general-practice-health-of-the-nation>

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