

The Future Series

Taking Sydney's Pulse: the Western City District

The Western City District (WCD) is set to change with a population forecast to grow by almost a third by 2036. As a result, this will create areas of opportunity for doctors, dentists and vets looking to set up a new practice, purchase an existing one, or expand their scope of services.

The profile of the WCD is set to change over the next two decades. Key transformations will include:

- a projected increase by 464,450 persons to 1,534,450 persons by 2036. Coupled with growth in infrastructure, housing and industry, the WCD may represent strong potential for medical professionals to benefit from increased and changing health service demand.
- an ageing population forecast to boom, with people aged 85 years and over increasing by 206% to 45,400 persons, and people aged 65 to 84 years increasing by 93% to 230,550 persons, by 2036. Demand for services for the ageing population is set to increase, including the frail aged and those with specialist conditions such as dementia.
- health care providers of child and family services have an opportunity to benefit from projected household and population growth across the WCD. Households of couples with children will continue to be the most common household type and are forecast to increase by 37%, or 56,600 households, by 2036. Camden Local Government Area (LGA) is projected to experience the highest level of total population growth across the WCD, increasing by 178%, and will account for 41% of population growth among children aged 4 years and younger, by 2036.
- the tried but true, 'location, location, location' will be critical. Future housing supply will be concentrated in key growth areas and planned precincts across the WCD, providing an opportunity for doctors, dentists and vets to establish or expand their practice in a competitive position, with population growth providing solid potential to grow the patient base.

education precincts located at Liverpool, Greater Penrith and Campbelltown-Macarthur.

The WCD Structure Plan is illustrated in Figure 1 below.

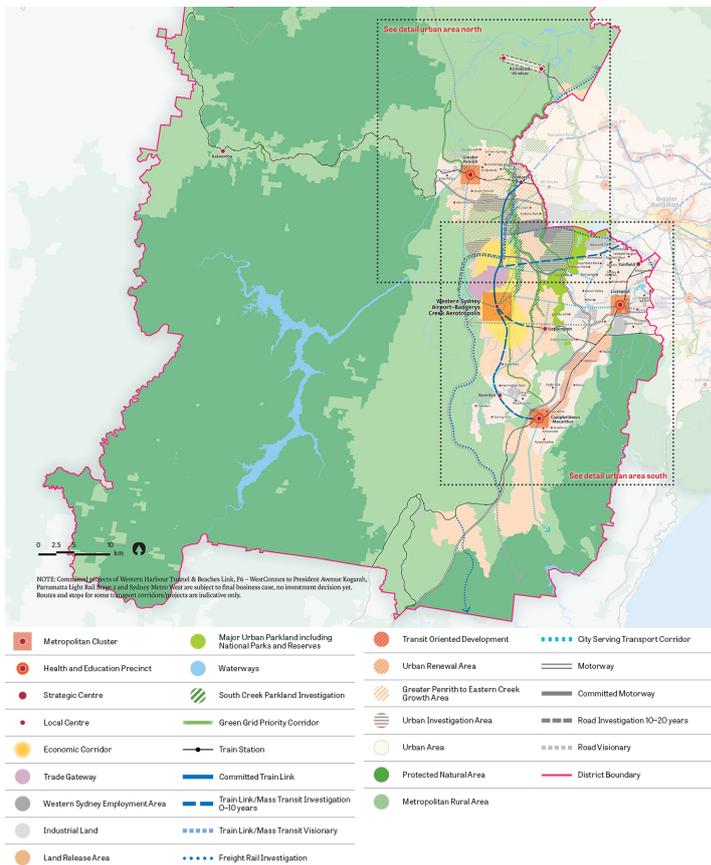


Figure 1: Structure plan for the Western City District

Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, Western City District Plan

WCD: 2016 to 2036

The WCD Plan will guide growth over the LGAs of Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith and Wollondilly for the next 20 years. The plan will support the overarching goals of A Metropolis of Three Cities – the Greater Sydney Regional Plan 2018, spanning 40 years. The WCD is earmarked for major growth including infrastructure, employment and housing.

The economy in the WCD is driven by retail, hospitality, industrial (includes manufacturing, trade and logistics), tourism, mineral resources and health and education. The plan recognises the WCD has three dedicated health and

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Over the next two decades, the population of WCD is forecast to grow by 464,450 persons or 27% to 1,534,450 persons by 2036. Camden LGA is projected to witness the highest increase during this timeframe, increasing by 178%, with growth primarily focused in the South West Growth Area.

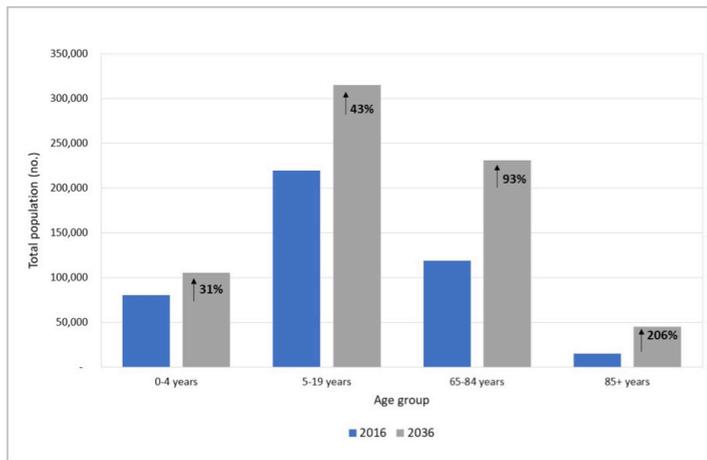


Figure 2: Population growth by age, 2016-2036

Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, WCD Plan

Older residents are set to increase across the WCD

The region will see a rise in ageing population with people aged over 85 years to increase by 206% to 45,400 persons, while the number of people aged 65 years to 84 years will grow by 93% to 230,550 persons by 2036. Liverpool LGA is forecast to experience the strongest growth in people age 64 years to 84 years with an additional 23,750 people over this time frame. The significant growth in the number of older residents will place pressure on health services, presenting an opportunity for doctors, specialists and dentists to provide a workforce which satisfies this changing age profile. Residential aged care facilities, respite care, home and community care options are likely to be increasingly in high demand by the community.

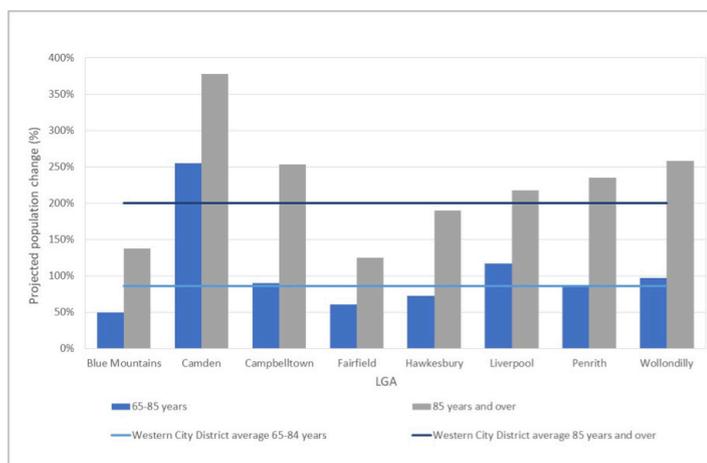


Figure 3: WCD project population change 2016-2036 by LGA: 65-85, and 85 years+

Source: NSW Department of Planning and Environment, 2016 New South Wales and Local Government Area Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney.

Families and children are on the rise

Children aged five to 19 years will account for almost 21% of the total population in the Western Sydney WCD, increasing by 43% from 219,600 in 2016 to 314,750 persons in 2036. Children aged four years or younger will increase by almost 25,000 or 31% during this time. Camden LGA may provide a good prospect for providers of child and family health care services, with the area forecast to represent 41% of this growth, an increase of more than 10,000 children.

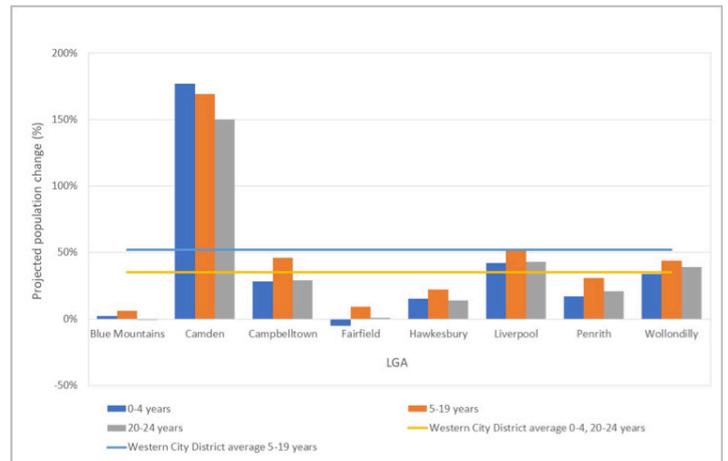


Figure 4: WCD project population change 2016-2036 by LGA: 0-4, 5-19 & 20-24 years

Source: NSW Department of Planning and Environment, 2016 New South Wales and Local Government Area Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney.

The Greater Sydney Commission anticipates households in the WCD will predominantly comprise couples with children. This household type will continue to be the most common and will increase by 37% (or 56,600 households), providing a promising opportunity for doctors, dentists and vets who provide family-based services. The WCD offers several potential growth areas for health care providers to establish clinics in new and expanding communities, with housing growth to be concentrated in Camden LGA (238%), Liverpool LGA (91%) and Wollondilly (87%).

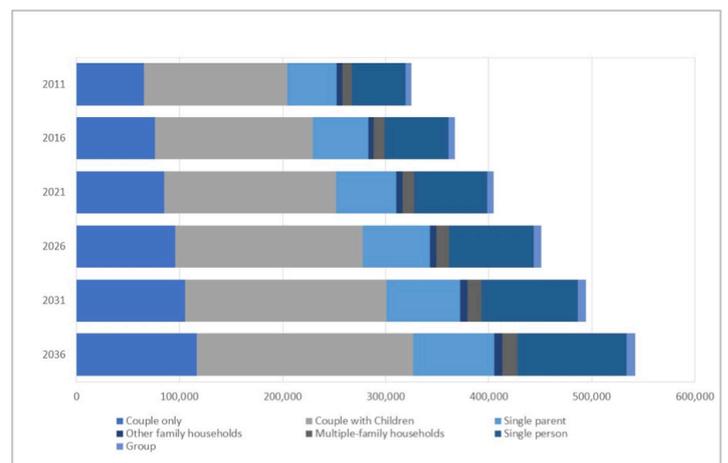


Figure 5: WCD projected household structure 2011-2036

Source: NSW Department of Planning and Environment, 2016 New South Wales and Local Government Area Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney.

Housing supply will increase and diversify

The WCD Plan identifies that future housing supply will need to increase by 184,500 new dwellings by 2036 to support population growth, changing household types and living within 30 minutes of work. Focus will be on providing housing diversity to accommodate changing demographics ageing population and single person households, affordability, and increased urban density. The plan has identified five housing market demand areas in the WCD which include:

- **Fairfield:** centred on the established neighbourhoods of Fairfield, Cabramatta, Prairiewood and Bonnyrigg
- **Liverpool:** including land release areas such as the South West Growth Area
- **South West:** including the South West Growth Area, the proposed Greater Macarthur Growth Area, Wilton Growth Area, Claymore Urban Renewal and Airds Bradbury Renewal Project and South Creek West Precinct
- **Penrith-Blue Mountains:** Greater Penrith and the villages of the Blue Mountains
- **North West:** including St Marys, Vineyard, the towns and villages of the Hawkesbury, and the eastern part of the Penrith health and education precinct at Werrington.

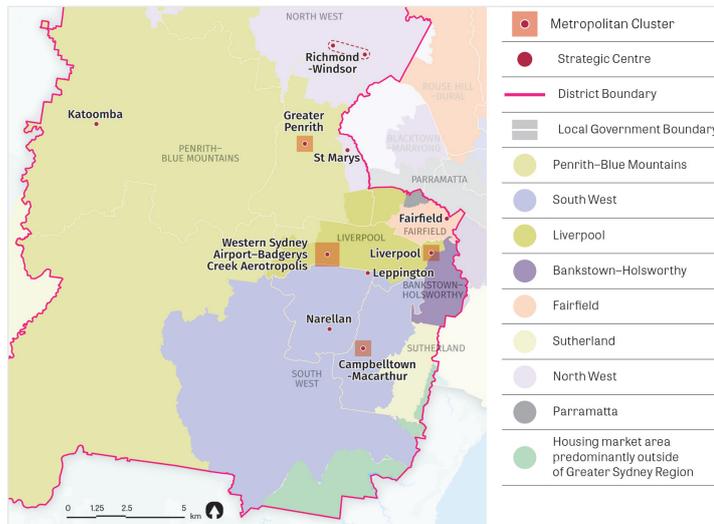


Figure 6: WCD housing market demand areas

Source: Greater Sydney Commission, 2016 adapted from *Implementing metropolitan planning strategies: taking into account local housing demand. Technical report (2013).* City Futures Research Centre University of New South Wales.

The historical 10-year annual average dwelling completion rate is 4,527 dwellings across the WCD. Over the five-year period to June 2017, the WCD recorded 31,553 or an annual average of 6,311 completed new dwellings.

Just under one third of those completed dwellings were located in Camden LGA (28%), one quarter in Liverpool LGA (25%) and 20% in Penrith LGA.

Completed dwellings were primarily detached dwellings (77%) and multi-unit dwellings (23%). According to the WCD plan, future housing supply will be concentrated in the following Growth Areas and Planned Precincts, with an emphasis on proximity to local infrastructure:

- Western Sydney Airport Growth Area - surrounding the Western Sydney Airport (north and east – Greater

Penrith to Eastern Creek) and Badgerys Creek Aerotropolis

- South West Growth Area comprising:
 - Leppington town centre Planned Precinct
 - Precincts at Oran Park, Catherine Field and areas under investigation at Lowes Creek, Merrylands and South Creek West
- Greater Macarthur Growth Area comprising:
 - Glenfield to Macarthur Corridor including Precincts at Macquarie Fields, Ingleburn, Minto, Leumeah, Campbelltown and Macarthur; and
 - Glenfield Planned Precinct
 - Menangle Park, Gilead and Appin
 - Wilton Growth Area
- Vineyard Precinct in North West Growth Area.

As part of the Western City District plan, the housing targets required for each LGA are summarised below.

LGA	0-5 year housing supply target: 2016-2021
Blue Mountains	650
Camden	11 800
Campbelltown	6 800
Fairfield	3 050
Hawkesbury	1 150
Liverpool	8 250
Penrith	6 600
Wollondilly	1 550
Western City District Total	39 850

Table 1: WCD housing targets by LGA

Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, Western City District Plan

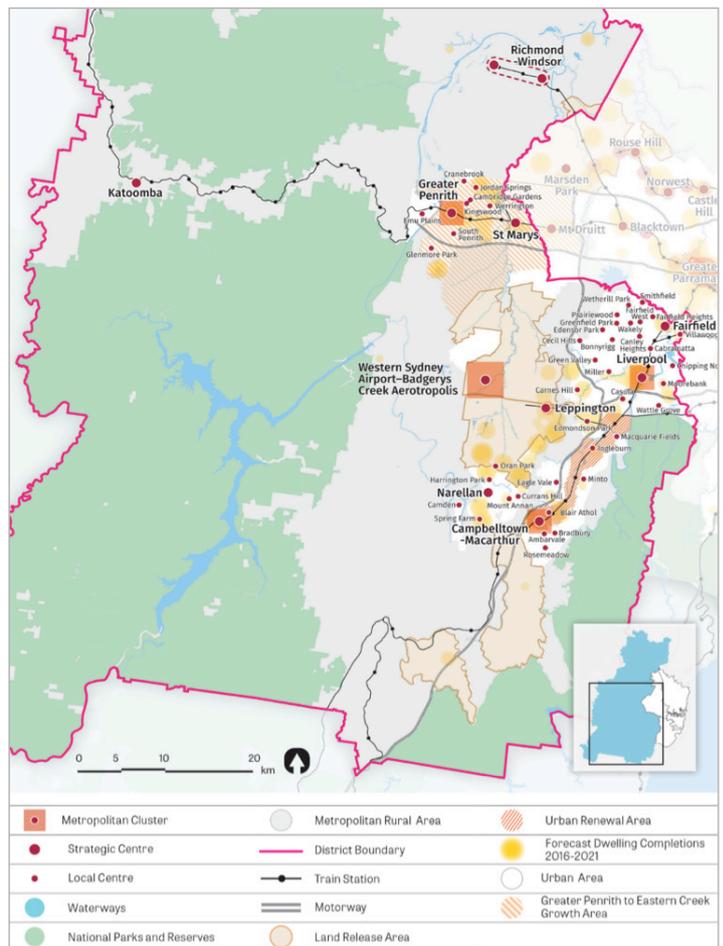


Figure 7: WCD future housing supply

Source: Greater Sydney Commission, New South Wales Department of Planning and Environment and New South Wales Government Housing Affordability Package.

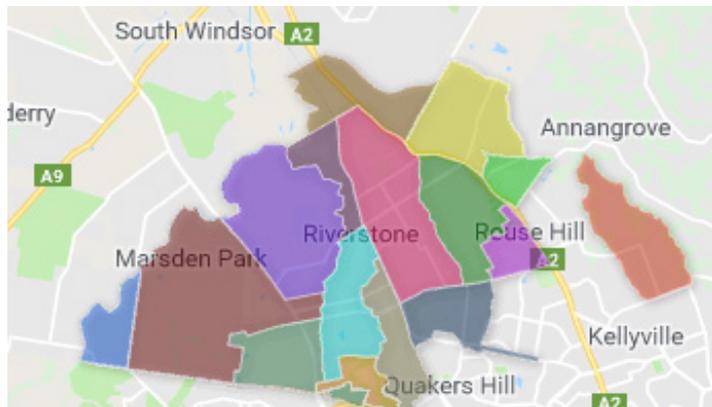
The plan states Councils are developing initiatives to achieve the plan outcomes, including:

- Liverpool, Penrith and Fairfield LGAs reviewing opportunities to provide new housing in close proximity to services and transport over the short to medium term
- Master planning of towns and villages being considered in Blue Mountains LGA
- Campbelltown LGA - proposed future redevelopment of ageing public housing estates at Minto, Airds, Bradbury, Claymore and Bonnyrigg (Fairfield LGA). This strategy would result in a decrease in public housing in these areas as social housing tenants are temporarily or permanently relocated.

North West Growth Area

The North West Growth Area, comprising 16 precincts, includes the suburbs of Colebee, Kellyville, Marsden Park, Riverstone, Rouse Hill, Vineyard and Schofields. The NSW Department of Planning and Environment state the objectives for the North West Growth Area are:

- Create vibrant and liveable neighbourhoods
- Provide more homes and greater housing choice
- Coordinate housing and infrastructure delivery
- Provide local jobs
- Improve recreational facilities.



- Alex Avenue
- Box Hill
- Box Hill Industrial
- Colebee
- Cudgegong Road
- Marsden Park
- Marsden Park Industrial
- Marsden Park North
- North Kellyville
- Riverstone
- Riverstone East
- Riverstone West
- Schofields
- Shanes Park
- Vineyard
- West Schofields

Figure 8: North West growth Area precincts

Source: NSW Department of Planning and Environment, North West Growth Area and Google Maps ©

For further information on each precinct please [click here](#).



Figure 9: North West Priority Growth Area status map

Source: NSW Department of Planning and Environment, North West Growth Area, North West Land Use and Infrastructure Implementation Plan, May 2017 p.12.

Project area	Anticipated dwellings*	Status
Marsden Park North	4,100	In planning
Vineyard (Stage 1)	2,400	In planning
Riverstone East (Stage 3)	2,300	Stage 1 and 2 were rezoned in August 2016. Stage 3 will be rezoned when infrastructure is available.
West Schofields	4,300	The southern part of the Precinct is currently in planning and the Department is working with the developer to prepare new plans for the area. The northern part of the Precinct has not yet been released for urban planning, however planning for the area has commenced jointly with the southern part of the precinct.
Shanes Park	4,300	Shanes Park Precinct has not yet been released for planning.

Table 2: Projects in the North West Priority Growth Area

Source: NSW Department of Planning and Environment, North West Growth Area, North West Land Use and Infrastructure Implementation Plan, May 2017 p.20.

*Subject to detailed planning investigations including flooding & flood evacuation studies

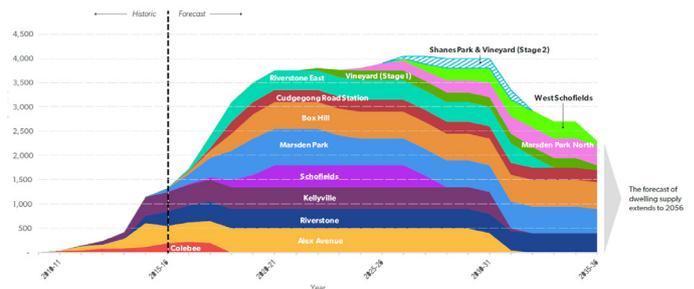


Figure 10: Dwelling supply forecast for the North West Priority Growth Area

Source: NSW Department of Planning and Environment, North West Growth Area, North West Land Use and Infrastructure Implementation Plan, May 2017 p.3.

South West Growth Area

The South West Growth Area is forecast to undergo considerable growth. Doctors, dentists and vets considering establishing a new clinic may benefit from a relative competitive position in the new communities earmarked for development.

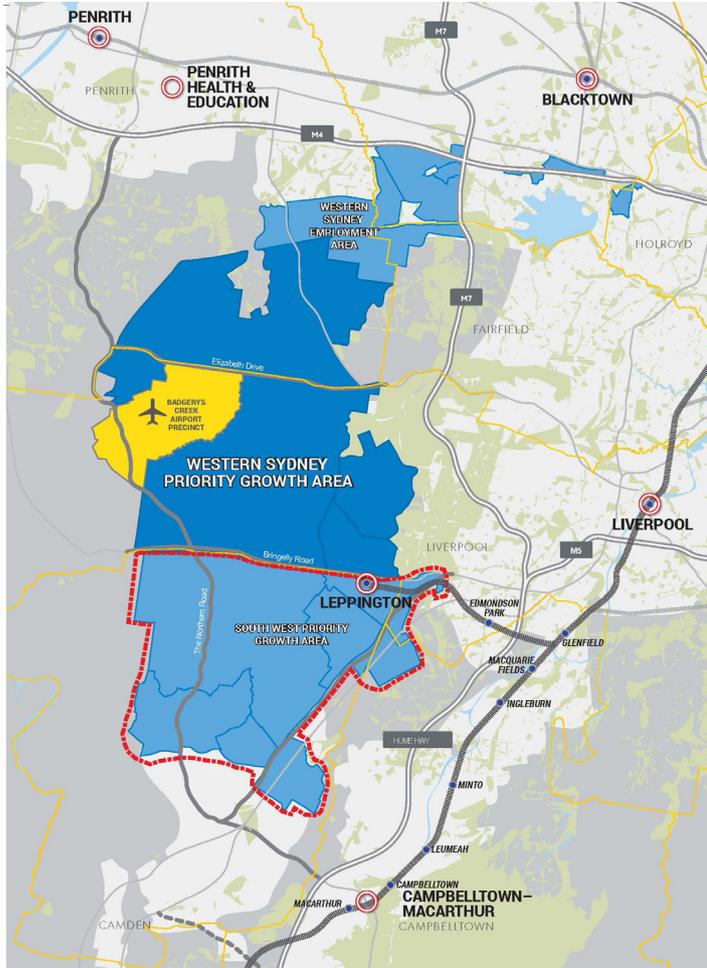


Figure 11: South West Growth Area
Source: NSW Department of Planning and Environment, South West Growth Area

The South West Growth Area plan includes the new communities of Oran Park, Turner Road, East Leppington, Austral and Leppington North, Edmondson Park, Catherine Fields and South Creek West, and new planned communities for Lowes Creek and an area of Marylands. The growth area will aim to provide more connectivity with communities and Western Sydney Airport and other major infrastructure, potentially improving accessibility to services and location desirability.

For more information on the South West Growth Area please [click here](#).

Local centres will enhance services

The WCD plan recognises the role of local centres which provide community services, shopping centres, access to public transport and interchanges and services for local residents. Generally, local government will continue to build on these centres to improve economic, retail, commercial and housing growth for the local neighbourhood.

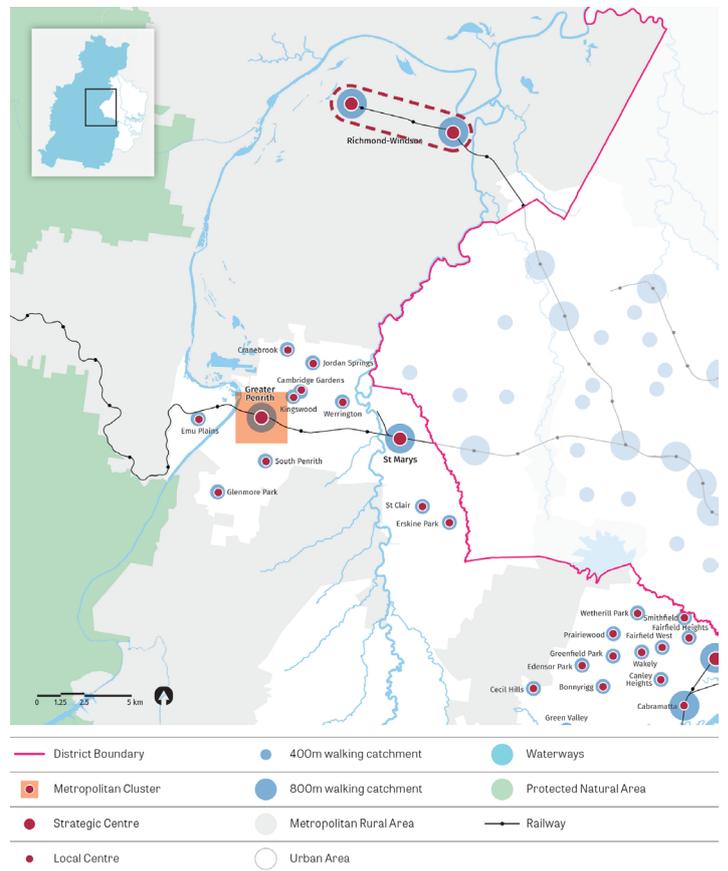


Figure 12: WCD (north) - centres
Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, WCD Plan

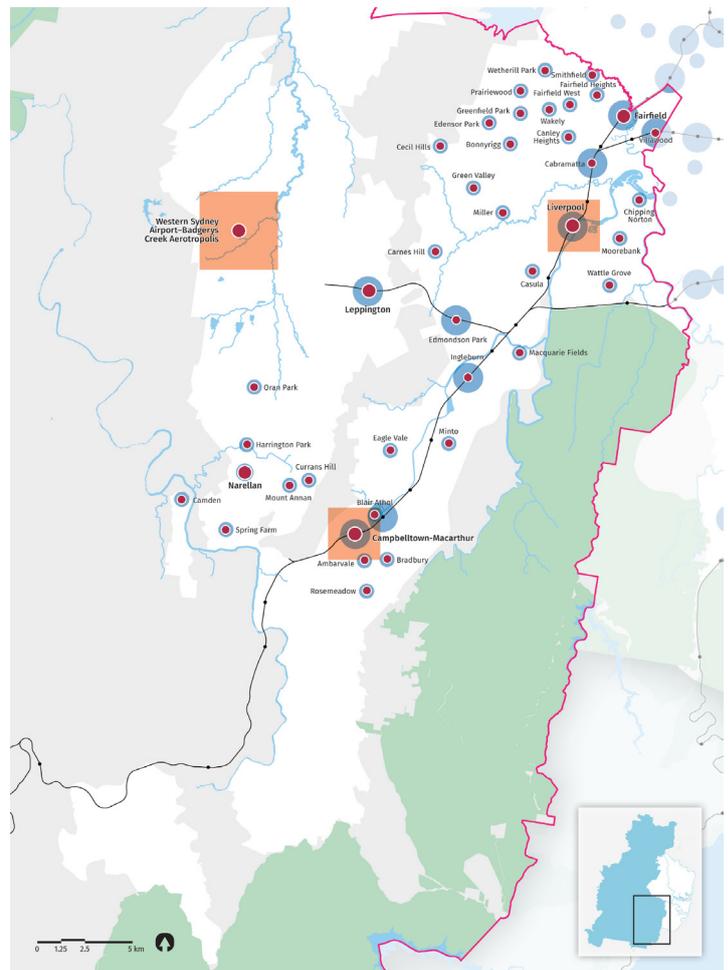


Figure 13: WCD (south) - centres
Source: Greater Sydney Commission, Greater Sydney Region Plan 2018, WCD Plan

Western Sydney City Deal to drive productivity and infrastructure

The Australian, NSW and local governments are working together to form the Western Sydney City Deal to improve infrastructure, investment potential and employment opportunities across the WCD. The Western Sydney City Deal includes six commitments: connectivity, jobs for the future, skills and education, liveability and environment, planning and housing and implementation and governance.

The plan states the Western Sydney City Deal is focused on:

- realising the '30-minute city' by delivering the North South Rail Link
- creating 200,000 jobs by supercharging the Aerotropolis and agribusiness precinct as catalysts
- skilling residents in the region and initiating an Aerospace Institute
- respecting and building on local character through a \$150 million Liveability Program
- coordinating and innovating through a Planning Partnership
- delivering for the Western Parkland City with enduring tri-level government.

Major infrastructure projects include Western Sydney Airport and Badgerys Creek Aerotropolis and the first stage of the North South Rail Link. These projects will generate employment growth, increase population and boost the Western Economic Corridor. Key areas identified to provide connectivity and support is Liverpool, Greater Penrith and Campbelltown-Macarthur to form a Metropolitan Cluster.

The governments are focusing on integrating planning transport and land use to maximise productivity of the region and are committed to, or investigating, the following projects:

Committed Transport	Transport Investigation
<ul style="list-style-type: none"> • Western Sydney Airport 	<ul style="list-style-type: none"> • Outer Sydney Orbital
<ul style="list-style-type: none"> • North South Rail Link from St Marys to Western Sydney Airport and Badgerys Creek Aerotropolis (first stage) 	<ul style="list-style-type: none"> • North South Rail Link from St Marys to Cudgegong Road and Badgerys Creek Aerotropolis to Macarthur
<ul style="list-style-type: none"> • Northern Road 	<ul style="list-style-type: none"> • South West Link from Leppington to Badgerys Creek Aerotropolis
<ul style="list-style-type: none"> • Bringelly Road 	<ul style="list-style-type: none"> • The Bells Line of Road-Castlereagh Connection
<ul style="list-style-type: none"> • M12 Motorway 	

Under the WCD Plan Collaboration Areas# have been created to assess opportunities that maximise the integration of land use, infrastructure, and community benefits for future growth. The plan identifies the following locations and states:

- **Liverpool (2017–2018)** – includes Liverpool's Central Business WCD (CBD), the health and education precinct and nearby residential and industrial land areas. It considers the Warwick Farm Precinct; the Moorebank Intermodal Terminal, which is under-construction; and the draft Georges River Masterplan.
- **Greater Penrith (2017–2018)** – includes Penrith's CBD, the health and education precinct, and the tourism precinct from Penrith Lakes along the current length of the Great River Walk to the M4 Motorway.
- **Campbelltown-Macarthur (2018–2019)** – includes the health and education precinct containing Campbelltown public and private hospitals, Western Sydney University Campbelltown Campus, and TAFE NSW Western Sydney. It also includes Macarthur Square, Campbelltown Mall and surrounding government services.

Key demographic snapshot

LGA	Blue Mountains	Camden	Campbelltown	Fairfield	Liverpool	Penrith	Wollondilly
Population Projections							
2011	78,550	58,450	151,150	196,500	188,100	184,600	44,600
2016	82,000	80,900	164,400	206,250	214,100	205,150	49,350
2021	83,000	109,400	177,800	211,050	241,900	221,600	51,300
2026	84,700	147,850	197,000	216,800	274,800	237,500	57,350
2031	86,950	185,600	214,100	221,000	301,100	253,600	64,450
2036	90,400	224,550	233,150	226,700	331,000	270,750	72,600
Age Structure (as at 2016) – Proportion of total population							
0 to 14 years old	18.3%	23.9%	21.6%	19.1%	22.7%	21.1%	22.0%
65 years old and older	19.5%	10.6%	11.8%	13.8%	10.4%	11.7%	13.3%
Household Structure (as at 2016)							
Couple with children	9,148	11,745	20,390	26,313	29,481	25,421	6,960
Couple without children	8,250	6,358	11,647	11,981	12,021	15,792	4,424
Single parent	3,182	2,986	9,087	11,870	9,438	10,063	1,654
Other family household	221	216	660	1,203	800	784	109
Family household	20,389	20,420	39,635	46,864	48,556	49,777	12,552
Single person household	7,386	3,298	9,180	9,002	9,208	12,236	2,316
Group household	854	360	1,161	1,323	1,029	1,656	232
Income (as at 2016)							
Median weekly household income	\$1,468	\$2,047		\$1,222	\$1,550	\$1,658	\$1,871
Median monthly mortgage repayments	\$1,842	\$2,220		\$1,800	\$2,123	\$2,000	\$2,167

Table 3: WCD demographic snapshot

Source: ABS Census of Population and Housing 2016, Cat No. 2001.0 and NSW Department of Planning and Environment, 2016 New South Wales and Local Government Area Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney.

2036: The Demand for Health Services in the WCD

For **general practitioners**, increases in the population of children and the elderly may offer an upswing in health service demand for child and family health and aged care services. Camden LGA is forecast to experience the highest population growth of children aged four years and younger while Liverpool LGA is anticipated to see a significant rise in elderly residents. Residential aged, respite and home and community care services will be required, including managing specific health and social care needs, such as those with dementia and the frail aged.

GPs looking to establish or expand their practice might consider looking to new Growth Areas and Planned Precincts such as Western Sydney Airport, South West, Greater Macarthur, Wilton, and Vineyard, which offer an opportunity to establish the business in a relative competitive position and grow the patient base.

For **dental professionals**, the most demand may be for infant, child and adolescent dental services, with children aged five to 19 years will account for almost 21% (or 314,750 persons) of the total population in the District by 2036. Camden LGA set to experience some of the highest population growth in these age groups and may yield the more opportunities. The District's new Growth Areas and Planned Precincts offer dentists greater options to establish new clinics in communities earmarked for growth and urban renewal.

For **veterinary professionals**, there may an opportunity to benefit from expanding communities to set up potential new clinics in growth areas such as Camden LGA with 11,800 new dwellings (particularly in South West Growth Area), followed by Liverpool LGA (8,250 new dwellings), Campbelltown LGA (6,800 new dwellings) and Penrith LGA (6,600 new dwellings).

In Conclusion

With significant population growth, investment and improvements in housing, public transport, education and health infrastructure over the next two decades, the WCD may present opportunities for new and expanded markets for health care.

Overall, health care providers may find the greatest demand for services among children and families and the ageing population. Camden LGA represents a significant area for growth among children aged four years and younger, and Liverpool LGA is set to experience a substantial increase in people aged 65 to 84 years.

Growth Areas and Planned Precincts such as Western Sydney Airport, including the new Badgerys Creek Aerotropolis, South West Growth Area, Greater Macarthur Growth Area, Wilton Growth Area and Vineyard Precinct in North West Growth Area, offer an opportunity doctors, dentists and vets to establish practices in emerging suburbs with strong potential to grow the patient base.

Selecting which areas and markets to focus on can be a daunting task requiring strong market insights. Health care providers who thrive will draw on in-depth research and analyses into the potential of key growth areas, assess their competitive position, and adapt to the population's ageing and changing profile.

Next time...

Our focus will move to the Illawarra-Shoalhaven regional area of NSW. We'll look at the future growth plans for the area, including population, major projects and infrastructure (both under construction and planned).

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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>

The WCD Plan states Collaboration Areas are a place-based process led by the Greater Sydney Commission to address complex issues that require cross-stakeholder solutions. This will be undertaken by identifying and aligning the activities and investments of government and stakeholders, based on evidence, to deliver significant regional and WCD liveability, productivity and sustainability outcomes.

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