

# The Illawarra-Shoalhaven: being part of a sea change

*This Future Series | Article Three is brought to you in collaboration with Health Project Services, and looks at what's to come for our city and its outer regions, all with a view to help you future proof your business.*

**The Illawarra-Shoalhaven (I-S) region of NSW has long been an area of escape from the hustle and bustle of Sydney. New regional growth plans from the NSW government that will guide local government, looks to be opening more opportunities for medical, dental and veterinary professionals to join a more permanent migration south.**

When looking at potential locations for your practice, it might pay to think outside the boundaries of a major metro area. The I-S region has growing opportunities for GPs, dentists and vets as the key demographics of the region reveal. In this report, we analyse state government plans for the I-S that aim to address commercial prosperity, housing, health, environment and infrastructure to better connect the four Local Government Areas (LGAs).

Much like the new residents who are moving for lifestyle and affordability, you too might benefit from these same factors, while gaining a significant foothold for your practice in a key growth area.

To make a start, we've taken a view of what the I-S region will look like over the next 20 years.

## Illawarra-Shoalhaven Regional Plan (ISRP)

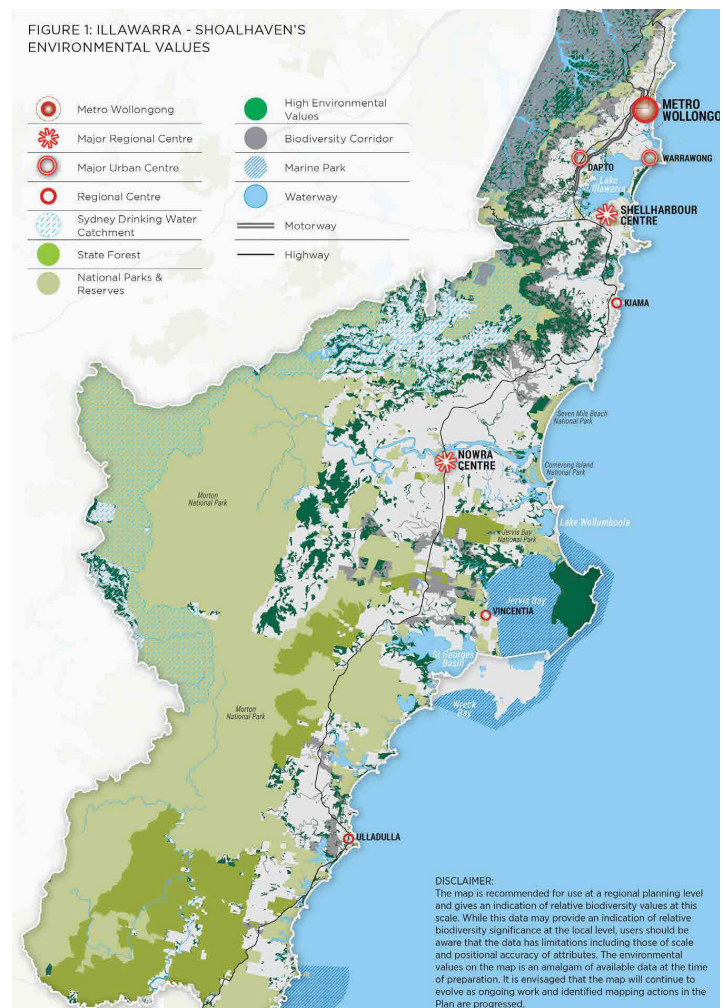
The ISRP will shape growth across the region over the next 20 years with the NSW Government identifying the following key goals for the region<sup>1</sup>:

- A prosperous I-S;
- A region with a variety of housing choices, with homes that meet needs and lifestyles;
- A region with communities that are strong, healthy and well-connected;
- A region that makes appropriate use of agricultural and resource lands; and
- A region that protects and enhances the natural environment.

The ISRP includes four LGAs of Kiama, Shellharbour, Shoalhaven and Wollongong and will be reviewed every five years or when necessary. The ISRP strategy map is shown on the right.

The NSW Government anticipated the region will grow by more than 60,000 over the next two decades to reach a peak of 463,150 people by 2036. The ISRP recognises the drivers for population growth will be:

- Natural increase;
- Migration of young families; and
- Migration of retirees seeking a lifestyle change.



**Figure 1: ISRP strategy map**

Source: NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan, page 6

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The ISRP forecast population growth and a rising trend of single and two person households will generate a need for a minimum of 35,400 homes by 2036.<sup>2</sup> The ISRP anticipates a rise in the proportion of ageing population, with 25% of the population to be aged 65 years or older, particularly in Kiama and the Shoalhaven LGAs. There may be an opportunity for aged care related health services in these areas to cater for future demand based on population growth projections for this age group.

The ISRP builds on the NSW Government's goals for regional economic development in the state which are:

- Promote key regional sectors and regional competitiveness;
- Drive regional employment and regional business growth;
- Invest in economic infrastructure and connectivity;
- Maximise government efficiency and enhance regional governance; and
- Improve information sharing and build the evidence-base.

Now let's take a look at the five specific goals of the ISRP and identify potential opportunities for medical, dental and veterinary professionals.

## Goal 1 – A prosperous Illawarra-Shoalhaven

The 'steel city' of Wollongong has historically been reliant on mining and industrial production. As changes in this industry occur, a key goal is to ensure there is diversification of industry in the region to ensure ongoing prosperity. The following sectors have been earmarked to lead growth in the I-S region over the next two decades<sup>3</sup>:

Sector	Aim
<b>Tourism</b>	Growth in tourism will focus on nature-based experiences, marine-based tourism and event-based visitation.
<b>Health, disability and aged care</b>	Growth will be driven by investment by Government into health infrastructure across the region, building upon existing health infrastructure, increasing health education and training, generate job growth particularly in residential care, allied health and community sectors.
<b>ICT/knowledge services</b>	The ISRP acknowledges this sector could provide advances in health, education, telework, e-commerce, business services, financial services and information and communications technology.
<b>Education and training</b>	The ISRP aims to leverage existing facilities, including the University of Wollongong and the Innovation Campus as well as teaching hospitals at Wollongong and Nowra to entice students and workers.
<b>Aviation, defence and advanced manufacturing</b>	Growth will stem from enhancing utilisation of the following: <ul style="list-style-type: none"> <li>• the University of Wollongong for innovation and research;</li> <li>• Port Kembla to increase trade and expand into containerised trade and other exports;</li> <li>• Defence industry; and</li> <li>• Illawarra Regional Airport.</li> </ul>
<b>Freight and logistics (port-related)</b>	This sector is anticipated to grow in response to increased activity from Port Kembla.

There will also be emphasis on 'knowledge-based' industries as the ISRP recognises the importance of the University of Wollongong, Innovation Campus and defence industries (at Nowra) to encourage employment growth across the region.

To support and generate growth across these sectors, the aim of the ISRP states:

Direction	Aim
<b>Grow the national competitiveness of Metro Wollongong to provide jobs and housing</b>	<p>Metro Wollongong will play a major role for continued economic growth, employment, population growth and housing supply. There are five precincts in Metro Wollongong being health, education, the commercial core, the waterfront and the Innovation Campus (please refer to figure 2 in appendix). The ISRP states the following key actions to achieve this direction as:</p> <ul style="list-style-type: none"> <li>• Create new and innovative opportunities for commercial development in the commercial core by making it more attractive for investment and business.</li> <li>• Increase the residential population of Metro Wollongong by making it more attractive place to live, work and play.</li> <li>• Improve the productivity and liveability of Metro Wollongong by connecting and integrating the individual precincts.</li> <li>• Revitalise west Crown Street by enhancing the amenity and investment opportunities between the health precinct and the commercial core.</li> <li>• Enhance the growth potential of the University of Wollongong to drive innovation in the region.</li> <li>• Establish a governance framework to guide the ongoing delivery of the ISRP's vision for Metro Wollongong.</li> </ul>
<b>Grow the capacity of the port of Port Kembla as an international trade gateway</b>	<p>Port Kembla exports commodities and imports motor vehicles and key port across the state. The ISRP states the following key actions to achieve this direction as:</p> <ul style="list-style-type: none"> <li>• Reduce land use conflicts by managing buffers around the port and its supporting freight network.</li> </ul>
<b>Grow strategic assets in key locations to help drive economic growth across the region</b>	<p>The ISRP identifies the following key centres will need further investment to support growth in Metro Wollongong and Port Kembla, these include:</p> <ul style="list-style-type: none"> <li>• Nowra Centre (figure 3 in appendix);</li> <li>• Shellharbour Centre (figure 4 in appendix);</li> <li>• Albatross Aviation Technology Park;</li> <li>• Illawarra Regional Airport; and</li> <li>• The Waterfront, Shell Cove.</li> </ul> <p>The ISRP states the following key actions to achieve this direction as:</p> <ul style="list-style-type: none"> <li>• Renew and revitalise Nowra Centre by coordinating State agency input into precinct planning and reviewing capacity for expanded health-related uses (please refer to map below).</li> <li>• Diversify and grow local employment opportunities in Shellharbour Centre by attracting complementary health and education activities (please refer to map below).</li> <li>• Support the growth of defence-related industries at the Albatross Aviation Technology Park.</li> <li>• Grow the tourism and light aeronautics industries, and the emergency services roles of the Illawarra Regional Airport</li> </ul>
<b>Support new and expanded industrial activity by providing well-located and well-serviced supplies of industrial land</b>	<p>Demand for industrial land has been boosted by increased activity of Port Kembla. The ISRP identifies there is sufficient future supply to meet demand and will focus on these key actions:</p> <ul style="list-style-type: none"> <li>• Investigate opportunities to better utilise industrial landholdings at Port Kembla</li> <li>• Support the development of new industrial land through ongoing collaboration between State and Local Government and servicing authorities, to coordinate infrastructure delivery.</li> <li>• Support growth in the priority growth sectors through flexible lands guidelines for the Illawarra-Shoalhaven.</li> </ul>
<b>Strengthen the economic self-determination of Aboriginal communities</b>	<p>The ISRP states the following key actions to achieve this direction as:</p> <ul style="list-style-type: none"> <li>• Conduct a strategic assessment of land held by the region's Local Aboriginal Land Councils to identify priority sites for further investigation of their economic opportunities.</li> </ul>

The ISRP identifies that well connected infrastructure can boost the local economy and produce more job growth for residents.

Potential infrastructure projects worth over \$AUD4bn that will increase employment by almost 13 000 new jobs are identified as:

- Improvements to rail travel times between Sydney and Wollongong;
- Extension of the M1 Princes Motorway from Waterfall to Alexandria;
- Completion of the Maldon to Dombarton freight line (in addition to improved rail freight connections between Port Kembla and the Main Southern Rail Line through an upgraded Unanderra to Moss Vale line); and
- Duplication of Picton Road in the long term.

Goal 2 – A variety of housing choices with homes that meet needs and lifestyles

A major attraction of the I-S region is the close proximity of the surf-friendly coast to the lush green mountain escarpment. This geographic boundary however contains the urban sprawl to a narrow strip of land between the coast and the mountains. As the projected population grows, the make-up of housing needs to change to fit more people into a limited space. There is also a demographic shift towards a lower number of household occupants.

The ISRP stipulated five key directions to address this housing goal:

- **Provide sufficient housing supply to suit the changing demands of the region** - this will involve providing a diversified range of dwelling types and affordable housing. The majority of future housing supply will be needed in Wollongong LGA (14,600 homes), followed by Shellharbour LGA (9,350 homes). Over the next 20 years, the ISRP expects housing need for each LGA as shown below.<sup>4</sup>

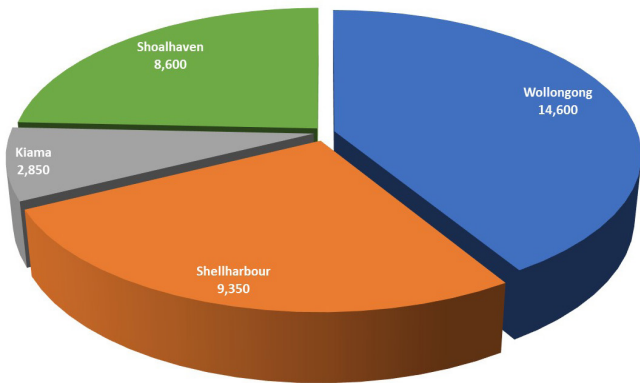


Figure 5: Projected housing needed by LGA 2016-18  
Source: NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan – Goal 2 – A Variety of housing choices with homes that meet needs and lifestyles

- **Support housing opportunities close to existing services, jobs and infrastructure in the region’s centres** - the ISRP identifies the need to maximise existing infrastructure by increasing urbanisation in selected centres. Investigations have determined there is potential for 24,100 new dwellings in urban areas.

The ISRP specified the following centres:

- Northern corridor – Thirroul, Corrimal and Fairy Meadow. Mostly medium density dwellings (villas, townhouses and other multi-unit dwellings) would be considered in these areas;
- West Lake Illawarra Corridor – Figtree, Unanderra, Dapto and Oak Flats;
- East Lake Illawarra Corridor – Warrawong, Warilla and Shellharbour Centre;
- Metro Wollongong – has potential to provide both medium density dwellings (more specifically West Wollongong) and apartments; and
- Southern centres – Kiama, Gerringong, Berry, Nowra-Bomaderry, Huskisson and Ulladulla. From this group, Kiama has the most potential for urbanisation with medium density dwellings and apartments. In comparison dual occupancies could be considered for Huskisson and Berry.

The ISRP recognises the state government will need to collaborate with local councils to ensure planning controls will cater to future housing demands.

- **Deliver housing in new release areas best suited to build new communities, provide housing choice and avoid environmental impact** - there are two major land release areas being West Lake Illawarra and Nowra-Bomaderry which will potentially provide 37,600 lots over the next 30 to 40 years. Almost 20,000 lots have already been zoned for development and located in:

Area	Lot capacity	Rezoned
Initial stages of West Dapto	6,900 lots	2010
Calderwood	4,800 lots	2010
Tallawarra site	1,000 lots	2010
Nowra-Bomaderry (comprising six precincts)	6,400 lots	2014

Other established and small release areas earmarked in the ISRP include Shell Cove, Tullimbar, Haywards Bay, South Kiama, West Culburra, Vincentia, Sussex Inlet, Manyana and Milton-Ulladulla.

- **Identify and conserve biodiversity values when planning new communities; and**
- **Monitor the delivery of housing to match supply with demand.**

### Goal 3 – A region with communities that are strong, healthy and well connected

The I-S region has traditionally had strong healthy communities on the coast centred around the beaches and surf life-saving. The ISRP prioritises the importance of retaining this community spirit in facets of society and providing infrastructure and facilities that encourage healthy living.

This includes better connections to essential services including healthcare. Key directions identified to achieve this goal are:

- **Grow the opportunities for investment and activity in the region's network of centres:**

Centre servicing the Illawarra-Shoalhaven	Centre type*
Wollongong	Metropolitan centre
Shellharbour and Nowra Centre	Major regional centre
Warrawong and Dapto	Major urban centre
Kiama, Milton-Ulladulla and Vincentia district	Regional centre
Corrimal, Fairy Meadow, Figtree, Unanderra, Warilla and Albion Park	Urban centre

- **Enhance community access to jobs, goods and services by improving connections between centres and growth areas;**
- **Build socially inclusive, safe and healthy communities; and**
- **Protect the region's cultural heritage.**

### Goal 4 – A region that makes appropriate use of agricultural and resource lands

Agricultural activity led by dairy farming has long been an economic driver of the I-S region. The state government acknowledges that protecting the region's agricultural land is crucial not only for the region but for the entire state of NSW.

There are three directions identified to achieve this goal:

- **Protect regionally important agricultural lands as an asset to food and fibre production**
- **Secure the productivity and capacity of resource lands**
- **Manage and protect the Sydney Drinking Water Catchment.**

### Goal 5 – A region that protects and enhances the natural environment

The natural environment, pristine coastal regions and marine parks present a tourism drawcard for the I-S region.

The ISRP recognises the value of the local environment and conservation of areas as well as the needs to minimise the impact of growth across the region.

There are four directions identified to achieve this goal:

- **Protect the region's environmental values by focusing on development in locations with the capacity to absorb development;**
- **Build the I-S's resilience to natural hazards and climate change;**
- **Improve the environmental outcomes for waste management and air quality; and**
- **Secure the health of coastal landscapes by managing land uses and water quality.**



Figure 6: Project population 2016-2036 by LGA: 0-20 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.



## 2036: The Vision for Health Services

**For GPs:** with higher density housing planned for the region, particularly in Wollongong and Shellharbour LGAs, it follows that a more concentrated presence of GPs will be required to meet demand. In Kiama and Shoalhaven LGAs, GPs catering to the elderly will be in high demand with population aged over 65 years being 12% higher than the NSW average. Investment in the teaching hospitals at Wollongong and Nowra also present opportunities for medical professionals to get training and also source qualified medical personnel.

**For Dentists:** young families have always been a reliable target patient pool for dentists. Young families are identified as one of three key demographic groups driving growth in the I-S region. Wollongong LGA will see the highest number of children under 19 over the next 20 years. The opportunities to become the family dentist for growing families in the region is not to be underestimated.

**For Veterinarians:** the NSW government identifies the I-S region as a major contributor to the state economy in the area of agriculture. Farming will continue to be a major opportunity for veterinarians to keep livestock healthy, particularly in dairy farming. Also, the increased migration of young families seeking more living space signals growth in family pets. This is particularly true in the Wollongong, Shellharbour and Kiama LGAs.

## In Conclusion

The I-S region has four distinct areas going through a similar transition of growth over the next 20 years. Each have their own unique opportunities for medical, dental and veterinary professionals.

The state government seems determined to create a distinct and self-sustaining community across the region. They aim to do this by improving commercial opportunities while protecting and supporting the lifestyle many have come to the area to enjoy. More specific research and due diligence applicable to your business will be required to ensure you make a well-informed decision to locate your practice in this growing region of opportunities.

### Next time...

Our focus will move back to Sydney and zero in on the Central City District area. This comprises four LGAs - Blacktown, Cumberland, Parramatta and The Hills.

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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1. NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan - Vision
2. NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan - Introduction
3. NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan
4. NSW Department of Planning & Environment, Illawarra-Shoalhaven Regional Plan - Goal 2 - A Variety of housing choices with homes that meet needs and lifestyles

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**Education Precinct** - The University of Wollongong, the Institute of TAFE Illawarra and two high schools, form an Education Precinct which offers potential economic and employment opportunities, particularly around the education and training sectors. The University is also closely linked to health education through the Wollongong and Shoalhaven hospitals.

**Innovation Campus** - The Innovation Campus is a centre of innovation and research excellence as well as being home to a number of leading research institutes working to develop solutions to scientific, engineering and social issues. Some of the research projects include the development of "intelligent" innovative materials with the potential to regenerate damaged human nerves, new techniques for sustainable building design, and the latest developments in digital media.

Source: NSW  
Department  
of Planning &  
Environment,  
Illawarra-Shoalhaven  
Regional Plan

Figure 2: Metro  
Wollongong Map



**Health Precinct** - This precinct incorporates a cluster of major health and medical facilities including medical suites, laboratories, training and rehabilitation centres. At the core of the precinct is Wollongong Public Hospital which is the Illawarra's major tertiary referral and teaching hospital.

**Commercial Core** - The commercial core of Metro Wollongong is a vibrant and diverse place for commercial, retail, cultural, tourism, housing, recreation and entertainment activity. Commercial activity is focused around Crown St Mall, with the surrounding land uses supporting some residential, and smaller commercial and light industrial uses.

**Waterfront Precinct** - This precinct encompasses beaches, parks, Wollongong Harbour, the Novotel Hotel, and a number of restaurants and cafés. It also has major recreation and entertainment facilities including the Wollongong Entertainment Centre and WIN Stadium. This area is an important cultural centre for the region and has the potential to encourage more tourists.



Figure 3: Nowra Centre

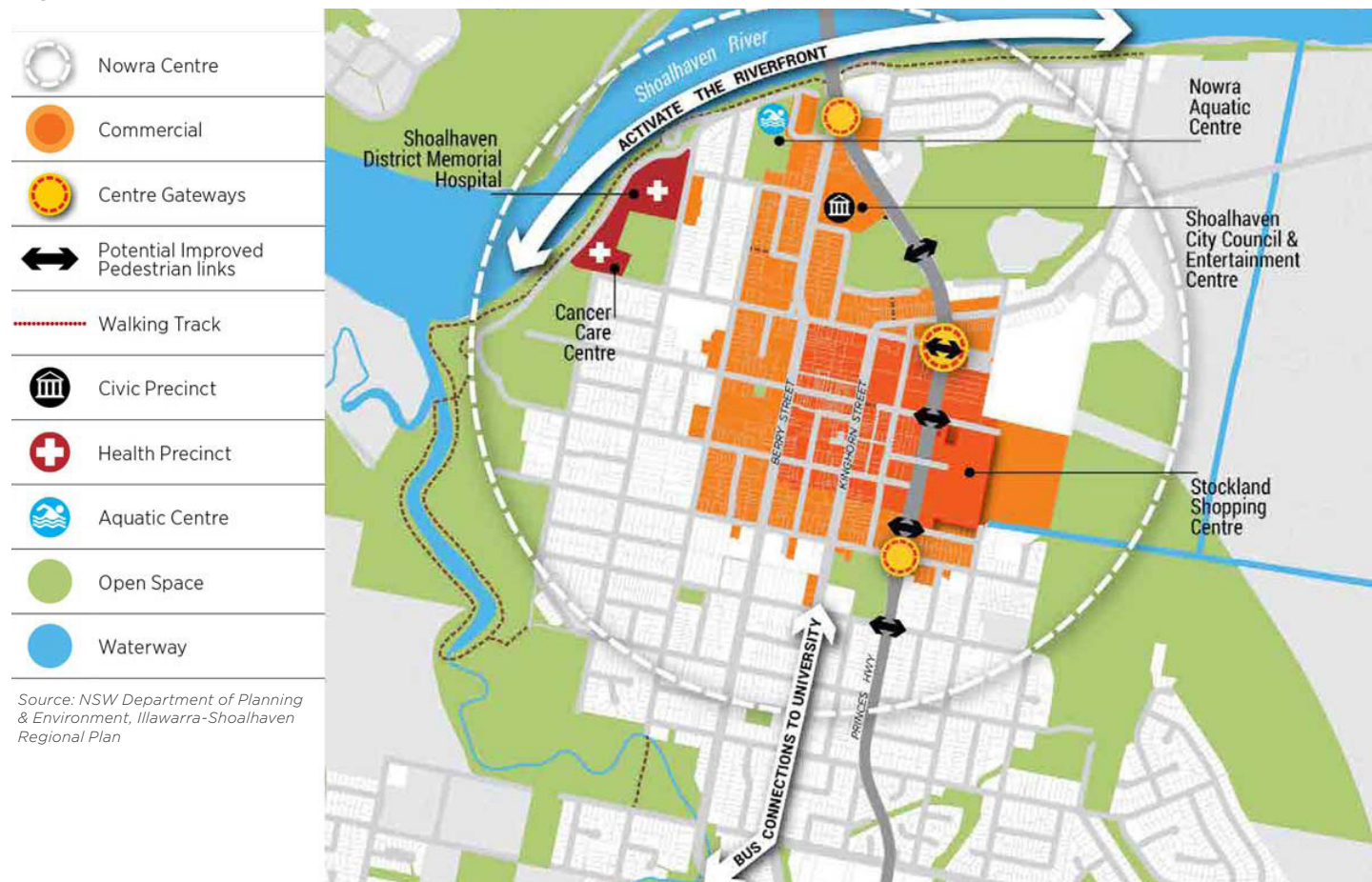


Figure 4:  
Shellharbour Centre



## Key demographic snapshot

	Kiama LGA	Shellharbour LGA	Shoalhaven LGA	Wollongong LGA	Greater Sydney GCCSA	NSW
Population Projections						
2016	22,150	71,150	99,600	211,750		
2021	23,450	76,200	102,750	220,750		
2026	24,700	81,100	105,550	229,250		
2031	25,900	85,850	107,900	237,150		
2036	27,100	90,500	109,700	244,400		
Total population increase	4,950	19,350	10,100	32,650		
Average annual growth rate	1.1%	1.4%	0.5%	0.8%		
Age Structure (as at 2016) - Proportion of total population						
0 to 14 years old	16.8%	19.9%	16.4%	18.0%	18.7%	18.7%
65 years old and older	23.5%	16.8%	26.4%	17.6%	13.9%	13.9%
Median age	47	39	48	39	36	36
Household Structure (as at 2016)						
Total no. families	6,009	18,954	26,871	53,149	1,247,047	1,940,226
Couple family without children	45.7%	34.7%	48.8%	36.3%	33.4%	36.6%
Couple family with children	42.0%	45.0%	33.3%	44.6%	49.5%	45.7%
Single parent	11.5%	19.1%	16.9%	17.5%	15.2%	16.0%
Other family household	0.7%	1.2%	1.1%	1.6%	1.8%	1.7%
Total no. occupied dwellings	7,730	23,627	38,181	73,958	1,623,868	1,940,226
Family household	76.0%	77.5%	68.8%	70.0%	73.6%	72.0%
Single person household	21.6%	20.6%	28.6%	25.5%	21.6%	23.8%
Group household	2.4%	1.9%	2.6%	4.5%	4.7%	4.2%
Average children per family	1.9	1.9	1.8	1.8	1.9	1.9
Household Structure (as at 2016)						
Median weekly household income	\$1,509	\$1,343	\$992	\$1,339	\$1,750	\$1,486
Median monthly mortgage repayments	\$2,000	\$1,846	\$1,517	\$1,950	\$2,167	\$1,986

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 NSW and LGA Household Projections and Implied Dwelling Requirements 2016 to 2036, NSW Government, Sydney.

## \*Definitions

As defined in the Illawarra-Shoalhaven Regional Plan:

- Metropolitan centre:** provides a full range of higher order services and activities including business, office and retail uses, along with arts, culture, recreation and entertainment facilities to serve the wider community and broader region. Contains major tertiary education and health facilities and incorporates high density commercial and residential development.
- Major regional centre:** larger scale centres that service a number of districts, providing a wide range of business, retail and entertainment uses, including discount department stores, warehouses, and transport logistics and bulky goods operations. Includes higher density residential development in the centre.
- Focal points for subregional road and transport networks and servicing for a number of districts.**
- Major urban centre:** larger suburban centres that service a broad catchment of communities, providing a range of business, retail and entertainment uses, including discount department stores and bulky goods operations.
- Regional centre:** major town centres servicing the local area and surrounding suburbs, providing a range of business, retail and entertainment uses, including supermarkets, health and other services. They include some higher density residential development.
- Urban centre:** suburban centres servicing the local area and surrounding suburbs, providing a range of business, retail and entertainment uses, including supermarkets, health and other services.