

CityPulse Sydney

Building three cities of the future

Making liveable, doable.

Introducing *CityPulse Sydney*

Sydney is Australia's global city, and one of the main engines of the Australian economy. Its population of just over four million is set to double by 2050. We need to plan for this growth so that everyone living in our city will have places to live, work and play. The next decade is crucial: through careful planning and the right investments, we can maintain and increase our global competitiveness, while creating a more liveable, inclusive city that attracts the best talent.

We're already feeling the pressures of a growing population: congestion on our roads, inefficiencies in public transport, constrained access to educational institutions and health facilities, and soaring costs of living across parts of Sydney. If our cities are to grow for the benefit of all Australians, we need to start with the facts and engage as a community; debate the investments, priorities and planning needed to make our cities the best they can be.

CityPulse Sydney lets us inform that debate by providing a fact base for how

we currently 'live', 'work' and 'play' across Greater Sydney. It enables us to understand the opportunities and challenges for our city at a suburb level. By using data from a range of third-party sources and PwC's own economic modelling *CityPulse Sydney* gives us an accurate and easily understood picture of how we live our lives, so everyone can form a view on what is working well in our city, and what's not. With the power of that knowledge we can all work together to solve problems and ensure our city thrives into the future.

CityPulse assesses which areas of Greater Sydney currently offer the best access to the things that help make our lives easier and more fulfilling: transport, housing, health services, employment, education, parks and recreation facilities, cultural facilities and entertainment.

Our research suggests that effective and thriving cities are those that connect the three elements of 'live', 'work' and 'play' – it is this interconnection that brings vibrancy, community involvement and fulfilment.

By presenting the data through an easy-to-use interactive map, we can better understand where the opportunities are for wiser planning and investment. We can also see where improvements need to be made in the areas of 'live', 'work' and 'play'.

It's important to note that people within a city have individual preferences – some aspects become more important than others. While *CityPulse* evidences generally poor accessibility in the far reaches of Sydney, the offering that these areas bring in natural assets is, to some, unparalleled. We don't need to bring an influx of jobs and entertainment, for example, to these areas, but we do need to strike a balance between the preference for living on the edges and providing the essentials that enhance the liveability of their residents.

Our research suggests that effective and thriving cities are those that connect the three elements of 'live', 'work' and 'play' – it is this interconnection that brings vibrancy, community involvement and fulfilment.



CityPulse gives us the facts to help plan the growth of our cities... Recognising that every location has different characteristics (geography, demographics, services) and understanding how that relates to our personal experience of the location lets us make better decisions and more targeted investment choices to improve the liveability of our city.

How *CityPulse Sydney* informs and supports reform

The recent Greater Sydney Region Plan, *A Metropolis of Three Cities*¹, sets a strategic direction for Sydney to grow into a polycentric structure with three thriving cities: the Eastern Harbour City, the Central River City and the Western Parkland City. While our *CityPulse Sydney* data explores geographical areas on a finer scale than these three cities, the polycentric city forms a framework for how we interpret the data, and informs our understanding of what we need to prioritise into the future.

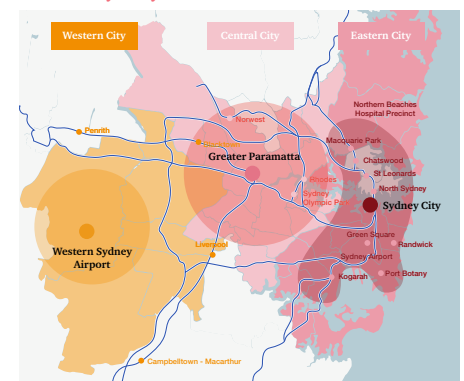
For the first time in NSW, long-term infrastructure, land-use and transport strategies have been released concurrently, with the state leading the nation in its intelligent planning of critical public infrastructure. Plans have been developed collaboratively, ensuring that a spatial land-use strategy guides how transport and infrastructure needs are met. The Future Transport Strategy 2056² sets out the government's strategy to deliver an ambitious, future-focused transport network. In developing the State Infrastructure Strategy 2018³, Infrastructure NSW (INSW) undertook a location-based assessment of industry strengths, labour patterns, sociodemographic trends, current infrastructure challenges and the future vision for jobs and growth, labelling this assessment 'Geographic Infrastructure Directions'.

These have guided INSW's assessment of infrastructure investment needs. We commend the government and its agencies for this critical and interconnected approach to infrastructure investment and planning.

The NSW Government is also adopting a more holistic approach across a number of other services for NSW citizens. Through Health Infrastructure NSW, the state has assessed the health needs of our communities and is planning to build new hospitals and upgrade a number of older hospitals in areas where they are most needed. Through School Infrastructure NSW, the state will provide more capacity to our education system giving all children accessible places to learn and flourish. The combined consideration of customer-centric transport, education and health sets Greater Sydney on a good path for the future. *CityPulse* tells us that education and health services are essential elements of a liveable city. Our view is that more can and should be done.

CityPulse gives us the facts to help us plan the growth of our cities and to inform and support reform. It combines data from a range of sources to support a more detailed, evidence-based geographic assessment that is underpinned by a belief that all citizens can obtain the services they need to live their lives well. Recognising that every location has different characteristics (geography, demographics, services) and understanding how that relates to our personal experience of the location lets us make better decisions and more targeted investment choices to improve the liveability of our city.

Greater Sydney



1. *A Metropolis of Three Cities*, Greater Sydney Commission 2018
2. *The Future Transport Strategy 2056*, Transport for NSW 2018
3. *State Infrastructure Strategy 2018 - 2036*, Infrastructure NSW (INSW) 2018

A deep dive into how we 'live', 'work' and 'play'



Making liveable, doable.



Live

A well-functioning city is one where people feel safe, comfortable and are able to access the services they need. The 'live' component of *CityPulse* focuses on indicators that cover the basic needs of our society, and are a clear measure of our wellbeing and level of social equity: amenities, health, housing and crime. The disparity across Sydney in the *CityPulse* findings is striking.

Live - Top 25

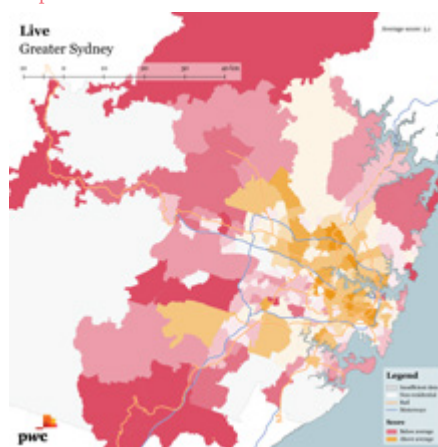
1. Epping - North Epping
- =2. Erskineville - Alexandria
- =2. Strathfield
- =4. Waterloo - Beaconsfield
- =4. Haberfield - Summer Hill
6. Lidcombe
7. Dulwich Hill - Lewisham
- =8. Pennant Hills - Cheltenham
- =8. North Ryde - East Ryde
- =10. North Sydney - Lavender Bay
- =10. Toongabbie - Constitution Hill
12. Marrickville
- =13. Baulkham Hills (East)
- =13. Homebush Bay - Silverwater
15. Cremorne - Cammeray
- =16. West Pennant Hills
- =16. Crows Nest - Waverton
- =16. Neutral Bay - Kirribilli
- =16. Northmead
- =20. Mascot - Eastlakes
- =20. Petersham - Stanmore
- =20. Mortdale - Penshurst
- =20. Lilyfield - Rozelle
- =20. Carlingford
- =20. Wentworthville - Westmead
- =20. Ryde



Proximity to amenities is critical to success

Our data demonstrates that areas high on the 'live' index are not concentrated in a particular part of the city. What is important is their proximity to amenities, services and a sufficient supply of housing. The top 10 areas in the index are spread across inner and middle-ring suburbs up to 25 kilometres from the Harbour CBD. The areas are also diverse in character. Epping (the highest scoring) is well established with transport, parks, schools and quality community services, while also characterised by housing stock that is low density and suburban. Conversely, Erskineville provides a more diverse mix of housing types, and at a higher density primarily due to smaller dwelling sizes. This area maintains a close link to the community amenities that make a location 'liveable'. Both areas face the challenge of maintaining their character while allowing for growth and higher population density.

Map 1: Live



Health directly linked to geography

As we move further away from the Harbour CBD, we see health performance decrease. This is both due to accessibility of health facilities and the community health score. This should turn around in areas such as Rouse Hill when construction is complete on the Sydney Metro Northwest, connecting them to more hospitals and medical centres. Investment into more recreational open spaces is also planned for this area, which will improve community health.

Large areas of the Western Parkland City need significant improvement in transport connections to health facilities as well as the addition of new hospitals and medical centres.



Continued prioritisation of higher education across Greater Sydney

CityPulse presents promising findings when it comes to accessibility to public schools, but access to higher education isn't such a good-news story. Only a very low proportion of Greater Sydney can readily reach higher education by public transport in 30 minutes or less. Mirroring our findings on access to health facilities, we must improve transport links to higher educational institutions, and add more university campuses, in the Central River and Western Parkland cities.



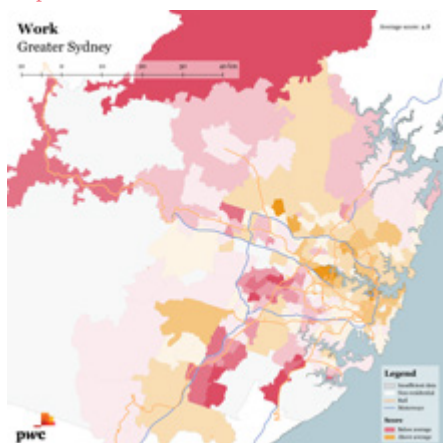
Work

Greater Sydney generates more than 24 per cent of Australia's GDP and is a vital contributor to our economy and global competitiveness. 'Work' indicators focus on economic performance, job accessibility and welfare dependency.

Work - Top 25

- =1. Sydney - Haymarket - The Rocks
- =1. Concord West - North Strathfield
3. Homebush Bay - Silverwater
4. Pyrmont - Ultimo
5. Parklea - Kellyville Ridge
6. North Sydney - Lavender Bay
7. Macquarie Park - Marsfield
8. Baulkham Hills (West) - Bella Vista
9. Erskineville - Alexandria
- =10. St Leonards - Naremburn
- =10. Parramatta - Rosehill
12. Homebush
- =13. Newtown - Camperdown - Darlingtown
- =13. Double Bay - Bellevue Hill
- =13. Paddington - Moore Park
- =13. Kensington (NSW)
- =13. Concord - Mortlake - Cabarita
- =13. Chatswood (East) - Artarmon
19. Northmead
- =20. Mascot - Eastlakes
- =20. Waterloo - Beaconsfield
- =20. Cobby - Leppington
23. Randwick - North
- =24. West Pennant Hills
- =24. Darlinghurst
- =24. Redfern - Chippendale
- =24. Bondi Junction - Waverly
- =24. Rose Bay - Vaucluse - Watsons Bay
- =24. Lane Cove - Greenwich
- =24. Frenchs Forest - Belrose

Map 2: Work



Sydney's CBD needs an innovation hub

To maintain our place as a global city, Sydney needs a strategy and commitment to innovation hubs. The sectors where we see a game-changing opportunity are health and medtech. The Camperdown-Ultimo precinct is 'innovation-ready' and would be an ideal area to kick off a central CBD innovation hub. This hub would leverage the capabilities and facilities of the established universities, hospitals and research institutions in the area, together with a diverse and engaged group of residents who live in the precinct and maintain its vibrancy. Westmead and Liverpool should also be developed into world-class medtech precincts, with close linkages to the Camperdown-Ultimo hub. This could put our city on the global map for innovation and STEM (science, technology, engineering and mathematics) jobs. To retain global talent and diversity among those living and working in the Eastern City, we need to ensure there is adequate supply and diversity of housing in and near the CBD. We recommend the government facilitates and promotes the Build to Rent sector – in particular, high-amenity rental properties in vibrant, mixed-use precincts close to transport and jobs. The innovation hub recommended can also focus on the provision of rental housing, and attract and retain talent.



Facilitate job-creation by leveraging new infrastructure nodes

Job accessibility is not just about transport to where jobs currently exist. It's also about bringing jobs to areas outside of the existing business districts and closer to residential areas. We have already seen this happening in thriving business centres like Macquarie Park, Liverpool and the Norwest Business Park. The government should consider using investments in transport networks and new transport modes to facilitate job-creation around the new infrastructure nodes, particularly along key transport corridors (for example, the Sydney Metro network extension).



Sydney is thriving beyond the Harbour CBD

It's no surprise that the Harbour CBD (including Sydney, Haymarket, The Rocks, Pyrmont and Ultimo) generates top scores for economic performance. But it's not just Sydney's east that is thriving. Parramatta-Rosehill, Homebush Bay-Silverwater and Macquarie Park-Marsfield are also high performers for economic output, with the north-west and south-west also showing growth in gross regional product (Kellyville, Riverstone, Marsden Park, Rouse Hill, Cobbitty, Leppington). This is due to substantial investment in essential infrastructure, transport, housing and services over the last decade. *CityPulse* supports the vision for Greater Sydney as a polycentric city, with opportunities for jobs and economic growth in all three cities and their surrounding strategic centres. It highlights the contribution parts of the Central River City (and Greater Western Sydney) are already making to Sydney's global standing, through high-performing areas and growth. The challenge for these strategic centres across Greater Sydney is to maintain their economic output, productivity and liveability for residents.



An over-reliance on car travel

CityPulse reveals another geographically dependent trend – the accessibility of jobs via public transport. Jobs located in the Harbour City are generally easily accessible by public transport, but the further someone works from the CBD, the more they rely on a car to commute to and from work. West of Parramatta, most areas have low job accessibility using public transport, even those close to the Parramatta CBD. Not surprisingly, these areas offer ready access to jobs by car, which is leading to a dependence on private vehicles. Improved public transport to these parts of Sydney would manage congestion and reduce opportunity cost. Further west, the decision of the Commonwealth and NSW Governments to prioritise investment in a new North-South rail connection between the Western Sydney Airport-Badgerys Creek aerotropolis and surrounding residential communities will be a catalyst for new jobs and economic growth.



Play

To make a city truly liveable, it needs to provide ways for people to connect, explore and recharge. That's because the way we spend our time outside work, school and commitments is a critical contributor to our overall wellbeing. We now spend more time than ever commuting in congested traffic, so easy access to places of entertainment, culture and recreation will give us back more time to do the things we love. 'Play' measures aspects of the locality that make it an appealing place for leisure activities such as entertaining, dining and cultural or sporting activities.

Play - Top 25

1. Sydney - Haymarket - The Rocks
2. Lilyfield - Rozelle
3. Lindfield - Roseville
4. Mosman
5. Sydenham - Tempe - St Peters
- =6. Lane Cove - Greenwich
- =6. Crows Nest - Waverton
8. Erskineville - Alexandria
- =9. Redfern - Chippendale
- =9. Pennant Hills - Cheltenham
- =11. North Sydney - Lavender Bay
- =11. Macquarie Park - Marsfield
- =13. Newtown - Camperdown - Darlington
- =13. Frenchs Forest - Belrose
- =15. Pymble
- =15. Neutral Bay - Kirribilli
- =17. Marrickville
- =17. Surry Hills
- =17. St Leonards - Naremburn
- =20. Mascot - Eastlakes
- =20. South Hurstville - Blakehurst
- =20. Drummoyne - Rodd Point
- =20. North Ryde - East Ryde
- =20. Ryde
- =25. Darlinghurst
- =25. Double Bay - Bellevue Hill
- =25. Paddington - Moore Park
- =25. Chatswood (East) - Artarmon
- =25. Willoughby - Castle Cove - Northbridge
- =25. Freshwater - Brookvale
- =25. Carlingford



Geographic inequality is limiting access to facilities that increase wellbeing

CityPulse presents an unfortunate reality: geographic inequality is limiting people's access to attractions and cultural, entertainment and sporting facilities. Areas generally west of Fairfield have lower scores for active living and access to entertainment and culture. Access to open spaces is far higher in the outer reaches of Greater Sydney than towards the CBD, partly due to the higher density of the inner and middle-ring suburbs, as well as the vast areas of national park and beach at the edges of Greater Sydney. For example, Manly through to Palm Beach enjoys easy access to the coastline, while Picton and Douglas Park to the south and Kurrajong Heights to the north are bound by parklands. Access to, and active use of, these significant natural features should be improved, and programs in these areas need to encourage the use of these wonderful outdoor attractions.



Sport plays a vital role in our economy

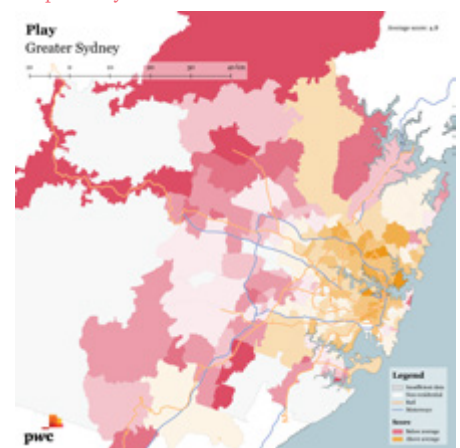
Sports are a central part of Australia's culture and will continue to contribute significantly to the economy. Large-scale sports venues in Sydney have become city icons and attractions for residents and visitors, as well as being anchors for wider entertainment precincts. Sydney Olympic Park stands as the largest sports and entertainment precinct in NSW and has been a catalyst for the renewal of the Homebush area. It is integral to the growth and revitalisation of Greater Parramatta to Olympic Peninsula (GPOP) – the geographic and demographic heart of Sydney and one of its most promising areas. The proposed light rail route, as part of Stage Two of Parramatta Light Rail, and the commitment to Sydney Metro West, will catalyse further growth in the area. These projects provide a key example of a precinct that will need to carefully balance 'live', 'work' and 'play' factors as it grows over the next 10 to 20 years.



We're benefiting from our diversity through 'Play' but we could do more

Access to entertainment and cultural facilities not surprisingly scores highest in and around the Harbour CBD. The five cultural infrastructure facilities that receive the most funding from the NSW Government are in the Eastern Harbour City, with limited access from the Central River and Western Parkland cities. *CityPulse Sydney* highlights the importance of and supports the current commitments from the NSW Government for significant investment (over \$1 billion) in cultural facilities in Western Sydney, including the New Museum of Applied Arts and Sciences in Parramatta, the Western Sydney Zoo and upgrades to the Riverside Theatres. These cultural assets are important - but as important is the incredible cultural diversity of this part of Sydney, which is celebrated at the local and community level. A program that includes compelling community-based events (such as the annual Deepavali festival in Parramatta), temporary performances and the use of existing open spaces for programs (such as Tropfest in Parramatta Park) should be encouraged and further promoted. This involves and connects the local community, and is a cost-efficient way to enhance leisure, celebrate culture and improve community wellbeing.

Map 3: Play



Transforming Sydney through transport corridors



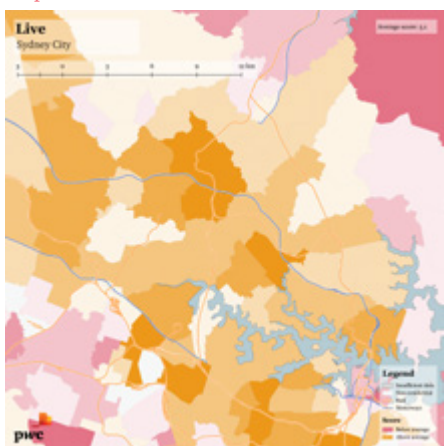
Making liveable, doable.



CityPulse highlights some very real opportunities through which we can transform our city; one of these is the amplified use of transport corridors. *CityPulse* shows that there is a clear correlation between investment in transport infrastructure and the ‘live’, ‘work’ and ‘play’ appeal of suburbs. Public transport links act as catalysts or building blocks for the growth and prosperity of our precincts and cities.

We need to invest in transport which strategically considers the next 50 years. Our goal should be significant connectivity and activation improvement of large parts of Greater Sydney. That demands planning and investing in transport for the long-term, including the development of the Western Sydney region. The transport plans for the Sydney region need to draw upon the innovative mindset of John Bradfield, who designed an eight-lane harbour bridge in the 1930s (amidst the Depression), decades before such a high level of traffic was expected. Had this thinking been maintained, we would not have built the M4 and M5 as only two lanes each way.

Map 4: Live



What does this look like across Greater Sydney?

The *CityPulse* data identifies the area north of the city, comprising Macquarie Park, Ryde and Bella Vista as experiencing rapid commercial growth and high scores across the 'Live' index with their success a direct result of transport developments. People are attracted to these areas because of the proximity to amenities, work (Macquarie Business Park, Northwest Business Park and the CBD are all relatively accessible) and quality community services including hospitals, schools, childcare centres and parklands. A strong catalyst for the success of these areas has been the opening of the Lane Cove Tunnel in 2007 and improvements to public transport through the development of the Epping to Chatswood Rail Link in 2009, which will be further improved by Sydney Metro Northwest next year.

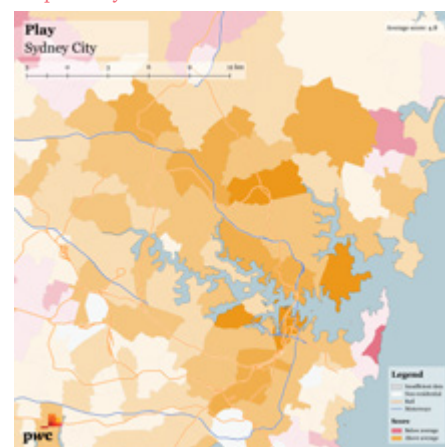
Greater Western Sydney is currently growing and developing, especially in and around strategic centres such as Liverpool, Narellan and Bringelly. The growth of these areas is sparked by people's ability to purchase land and housing at more affordable prices than in middle and inner-ring suburbs, as well as the introduction of the South West Rail Link and the Leppington Rail Line.

Areas in the Eastern Harbour City that score highly on all three indexes are located on well-established transport corridors or in close proximity to Sydney's CBD. There is a clear correlation between a high 'play' index and access to the CBD and Sydney Harbour in less than 30 minutes. These transport corridors include Lilyfield–Rozelle (light rail and ferry), Lindfield–Roseville (train), Mosman (ferry and bus) and Sydenham–Tempe–St Peters (train and bus).

Continued coordination of transport, housing, employment and community infrastructure is essential to creating communities, and realising greater benefits from our investment in transport infrastructure.

By the same rationale, areas scoring highly on the 'Work' index are those with good access to employment centres via public transport – and this doesn't just mean access to the CBD. Suburbs near or with ready public transport access to Sydney Olympic Park, Macquarie Park, North Sydney, Pyrmont and Northwest Business Park all score highly.

Map 5: Play



Opportunities to pursue:



It's clear that transport links fuel economic activity and contribute to social amenity. We support investment into rail links to the Western Sydney Airport (WSA). It is important that the governments partnering on the City Deal with local community and businesses finalise plans for the North–South Rail Link alignment; as the Western Parkland City grows, liveability will rely on additional transport that connects residents to opportunities arising from the new airport.



Interconnectivity of cities and precincts is vital. For Sydney that means we need to create rapid-transport links between the new airport and both the Central River and Eastern Harbour cities. This radial connection between the airport and the three cities will help make the new airport a hub for the entire Sydney region.



Investment in transformative infrastructure around the new Western Sydney Airport will give the government the chance to create real value for the community and land owners. Once created, this value can be captured and government can share a portion of the subsequent increase in land values.



A first step in achieving the vision for a great city is to understand current behaviours, and which of those need to be changed to make the vision a reality. That is especially true for transport in Sydney, where incentives could ultimately change behaviour to ease road congestion. This strategy includes using existing transport infrastructure in smarter ways to meet the future needs of the growing population, and assess alternative funding mechanisms, including road-user charges and value-capture.



We support the NSW Government's current promises to improve existing transport infrastructure in our urban areas, to increase the productivity and liveability of our city. These include the Sydney Metro, Sydney Metro Northwest and Southwest lines, and the Western Sydney Rail. These projects will both improve transport connections, and enable transport hubs to become the centres of active precincts – creating more places for our community to 'Live', 'Work' and 'Play'. They include significant opportunities at Circular Quay and Central Station.



Transport infrastructure must cater for the growing demand for off-peak travel. This extends beyond questions of timetabling. There are challenges for governments wishing to increase transport efficiency, particularly first mile/last mile issues. We must provide transport that suits people with flexible work schedules, are taking part in sports and leisure activities on weekends, or travelling after hours, as we move towards a globally connected, 24-hour economy.

Creating a more skilled, fulfilled Greater Western Sydney



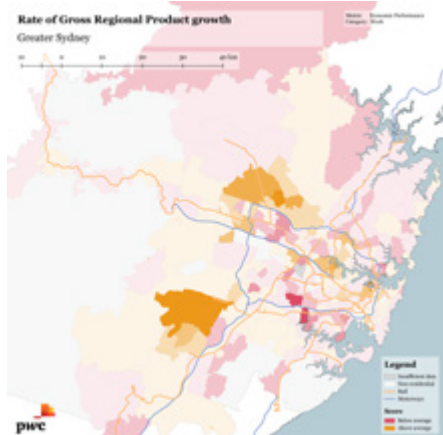
Making liveable, doable.

As we build three cities within Sydney, perhaps our biggest opportunity comes in creating a thriving Greater Western Sydney. This region, comprising the Central River and Western Parkland cities, forms a vital part of our city's development and history. At the turn of the 20th century, while the areas in and around the CBD developed into dense places where people both lived and worked in an urban environment, the western suburbs grew from country towns centred on transport nodes into an expanded urbanised area, which we see today.

Productive and liveable cities

The *CityPulse* data reflects the nodal development of Greater Sydney, in contrast, for example, to Melbourne's radial development from the city centre outwards. Parts of Greater Western Sydney contribute significantly to economic performance (with Leppington, Parramatta, Baulkham Hills and Parklea forming an economically productive arc), and a substantial portion of Sydney's population lives west of Parramatta. The population growth projected for Greater Western Sydney (from 1.9 million to 3 million by 2036), coupled with the growth potential of various strategic areas, presents an opportunity to develop productive and liveable cities outside the Harbour CBD.

Map 6: Rate of Gross Regional Product growth



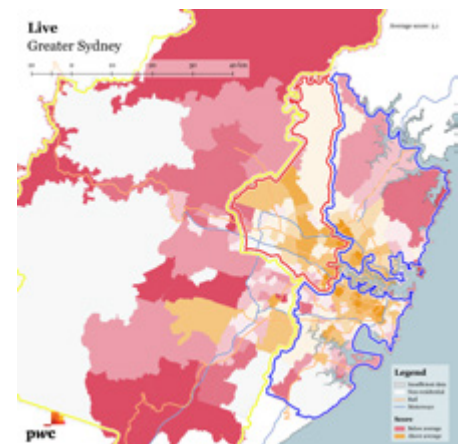
Parramatta is a strong commercial and business centre for Greater Western Sydney, as well as offering ready access to health facilities, schools, child care, aged care, sports and fitness facilities, entertainment and attractions. Housing rent and purchase prices are also relatively affordable. While Greater Parramatta offers wide public transport choices and serves as a transit hub, the suburbs further afield have poorer accessibility via public transport and still rely heavily on the road network.

Parramatta was identified in 2005 as a key strategic city (along with the CBD, North Sydney, Liverpool and Penrith) in the metropolitan strategy *City of Cities*⁴. Since that strategy, the government has focused on fostering innovative business environments, promoting job growth and improving liveability in the area to encourage people to live closer to where they work. More recently, the Greater Sydney Commission released a vision for Greater Parramatta to the Olympic Peninsula (GPOP) and designed Growth Infrastructure Compacts which will bring government, business and the community together to match housing and jobs growth with timely and cost-effective delivery of infrastructure.

We fully support the development occurring in Westmead, which has grown to become a global player in high-quality health care. Westmead is rapidly becoming an ecosystem for allied health services, health education, medical research, science and innovation. Continued investment in this precinct and in similar health precincts in the Sydney CBD (for example, in and around Royal Prince Alfred Hospital and the University of New South Wales in Randwick) will help these areas to become innovation hubs for health and medical research. Jobs in this sector are high value, enduring and globally in great demand, especially in Asian markets. Health care is one of the industries in which we should invest as a source of competitive advantage for the nation. The foundation stones are already in place and are working well.

The Greater Sydney Region Plan⁵, released in 2018 by the Greater Sydney Commission, established the Western Sydney Parklands as part of a third city, with the new airport at its centre. Greater Penrith and Liverpool are now established centres of economic productivity and will be the primary metropolitan clusters serving the Western Parkland City. If the Western Parkland City is given the same focus on growth, job creation and liveability as Parramatta has been since it was marked as a key strategic centre, we will see similar opportunities for investment and development.

Map 7: Live Greater Sydney



While the Central River City is well established, and investment in this area continues, the Western Parkland City, anchored by the WSA, is essentially a blank canvas – one that presents even greater potential to develop a well-planned city that is scalable, technology-enabled and delivers on all aspects of 'live', 'work' and 'play'.



4. *City of Cities: A Plan for Sydney's Future*, New South Wales. Department of Planning 2005

5. *A Metropolis of Three Cities*, Greater Sydney Commission 2018

Header image source: Liverpool City Council

Parramatta, Bankstown, Liverpool triangle - our zone of opportunity

The *CityPulse* results show a zone of opportunity bounded by Parramatta, Bankstown, Liverpool and Wetherill Park. Across the *CityPulse* metrics of 'live', 'work' and 'play', this area generally underperforms. Parramatta has seen significant investment in the last decade and resultantly does well across a number of indicators, however key transport and infrastructure has not extended beyond Parramatta to Liverpool or Bankstown.

The poor connection of these suburbs and inequality of opportunity has led to inadequate accessibility, especially to jobs, but also to educational institutions, sports facilities, cultural activities and entertainment options. We need to regenerate these areas by prioritising investment into key transport, including public transport from the Fairfield area back to the east, and to Liverpool from both Parramatta and Bankstown to spark the renewal of all areas in between. This will offer higher accessibility to the CBD and other employment centres, which could potentially have a profound effect on the number of people currently depending on welfare - although property prices in the area are relatively affordable, rental and mortgage costs are among the highest in the city as a proportion of income.

We will see great benefit from investing in the activation of their open spaces, of which there are plenty, to improve the health and wellbeing of the communities. If we invest in these areas like we have in Parramatta, we will see meaningful change and the opening of opportunities for many communities in this zone.

The committed Sydney Metro line from the CBD to Bankstown will spark growth and renewal towards this area, as well as the regeneration of Bankstown as a key activity centre. However, without the continuation of significant transport such as Sydney Metro through to Liverpool and the surrounding areas, we will miss the opportunity for further renewal into Greater Western Sydney.

A gateway to Sydney

CityPulse reveals the spatial inequality experienced in the Western Parkland City, particularly in job access, amenities and health, but the Western Parkland City has many strengths. It is positioned directly adjacent to some of Australia's most treasured national parklands. This provides opportunities to increase access to activities and improve the wellbeing of residents, as well as to attract further tourism. The South Creek catchment also has the opportunity to become an 'enabler of world class water management, urban greening and climate control', as stated in the State Infrastructure Strategy, and as such, should be preserved along with the national parklands and transport corridors. The City Deal is a step in the right direction, with the commitment to the Liveability Program to deal with some of these aspects of wellbeing and use of outdoor spaces. If the government provides a robust and efficient transport connection to the Central River and Eastern Harbour Cities from the WSA, (an 'East-West' link) it could become the international gateway for freight (potentially linking with Inland Rail) and for Sydney's considerable tourist industry providing an alternative to the Harbour CBD as an entry point into Sydney.

Map 8: Jobs accessible by transit



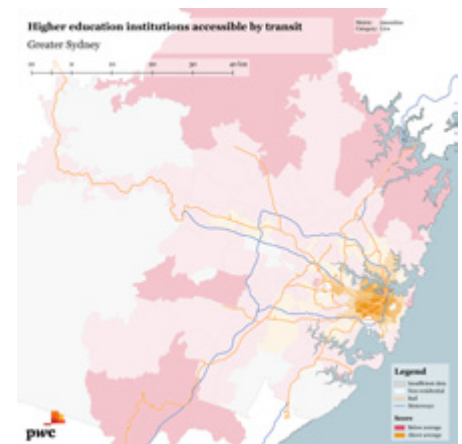
Creating a more skilled, fulfilled Central River City through education

The *CityPulse* data highlights a vast inequality in access to higher education facilities between the traditional centre of Sydney and the outer rings (see maps 9 and 10). This profoundly affects the Central River City, which only gained its first university (the University of Western

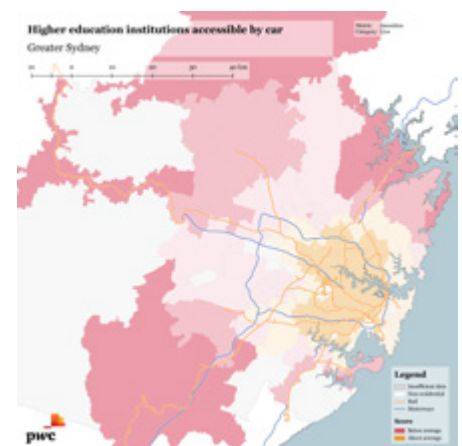
Sydney) in 1989. While there is a heavy dependence on private vehicles in the western suburbs (due to prioritised road infrastructure), access to higher education via car is just as difficult for the outer ring (see map 10 below). In addition to there not being enough higher educational institutions in Western Sydney, we need to consider how to provide the right training to develop the skills for the right industries for the growth of Western Sydney.

There have been some moves to correct this imbalance, with Western Sydney University opening a new campus in the centre of Parramatta in 2017, occupying the first 10 storeys of a prominent city centre building. The campus is easily accessible by public transport and students and staff benefit from being in the heart of Parramatta's thriving city centre. Additionally, the University of Sydney has announced plans to develop a new campus in Westmead (in addition to its existing Clinical School in Westmead Hospital) with full course offerings, while Wollongong University will open a new campus in Liverpool in 2018.

Map 9: Higher education institutions accessible by transit



Map 10: Higher education institutions accessible by car



Opportunities to pursue:



These growing regions need a commitment to development of every element that contributes to liveability and people's wellbeing – not just economic growth. The Western Sydney City Deal is integral to the holistic development of this region, with significant investment through the \$150 million Liveability Program. This will improve community facilities and urban amenity, helping to transform the Western Parkland City into a place where people can 'Live', 'Work' and 'Play'. This investment is critical to enable vibrancy and community engagement, but we believe the \$150 million will be stretched too thin given the greater attention that is needed, now and into the future. Funding for this vital program needs to be assessed and boosted.



Parramatta is home to an exceptionally culturally diverse community. We envisage central Parramatta becoming Sydney's festival centre, with a series of community-based festivals connecting culture, the arts, sport and business. A festival calendar would capitalise on the area's vibrancy and educate residents and visitors about the diversity of this area. Involving the community would also create a stronger sense of identity and ownership for this huge region. We also suggest that the successful Vivid theme that activates our CBD be transformed into a Vivid that illuminates our cultural diversity in the Parramatta area, including the significant indigenous landmarks in the Central River City. A cultural and community services plan could help make this happen.



In Western Sydney, we must be more determined in encouraging active living. More walkways, cycleways, parks and recreational facilities in the Central River and Western Parkland cities will contribute to healthier lifestyles and help to connect communities.



Developing and keeping a talented workforce is critical for Greater Western Sydney to thrive in the long-term. That demands a commitment to developing the skills of its citizens, of attracting global talent, and an emphasis on embedding and retaining that talent in the community. Access to quality education can enable that level of fulfillment and act as the glue to keep the community connected within the workforce. We need to build a strong university presence, developing new universities and expanding existing ones, including satellite campuses for well-established universities in the centre of Sydney. Exploiting Sydney's existing strengths in education is especially important in the areas of health care, innovation, science, industrial research and development. Further, we recommend a review of current Commonwealth funding arrangements to ensure adequate funding for universities in our growing Central River and Western Parkland cities.



The precincts of Camellia, Westmead and the Sydney Olympic Park Authority all present opportunities to improve their 'work' and 'play' indexes. This would require holistic planning and investment through Precinct Deals, similar to City Deals, whereby all three levels of government come together to make decisions on land-use planning and funding. The NSW Government could lead the way, working with local councils and seeking Federal Government support and investment where needed. These precincts could also actively involve local communities in making important planning decisions. This community partnership approach is based on the Western Sydney City Deal, which includes working with indigenous organisations.



The health of our communities must be given high priority, particularly improving the poorer overall health of communities on the outer edges of Greater Sydney. Investment in health infrastructure is essential in these areas, and the NSW Government has begun a once-in-a-generation capital works program. But new hospitals alone are not enough. Greater attention to preventative health care is critical – not just for the health of these communities, but also for the long-term sustainability of the sector. New ways of providing services are also needed, so that care can be offered closer to people's homes and communities, and in ways that better meet their particular needs (for example, integrated services to meet chronic care needs, as opposed to acute health problems). Implementing the promised Western Sydney Health Alliance would improve health care through new approaches that include better access to data.



A clear strategic direction is required for the Western River City – not only to provide housing at a suitable density, but also for the sensitive development of commercial centres, innovation and business hubs, and social amenity. We recommend that the NSW Government develops a Western Sydney Prospectus to attract new businesses to the region, centring on the aerotropolis surrounding the planned WSA. Further, we recommend promotion of key industries of the future in and around the WSA, including agribusiness, defence, aerospace, freight and logistics.

Making Sydney's vision a reality

The vision for Greater Sydney is a metropolis of three cities. By understanding 'live', 'work' and 'play' data from *CityPulse*, and how these relate, we can start to identify the actions that will make this vision a reality.

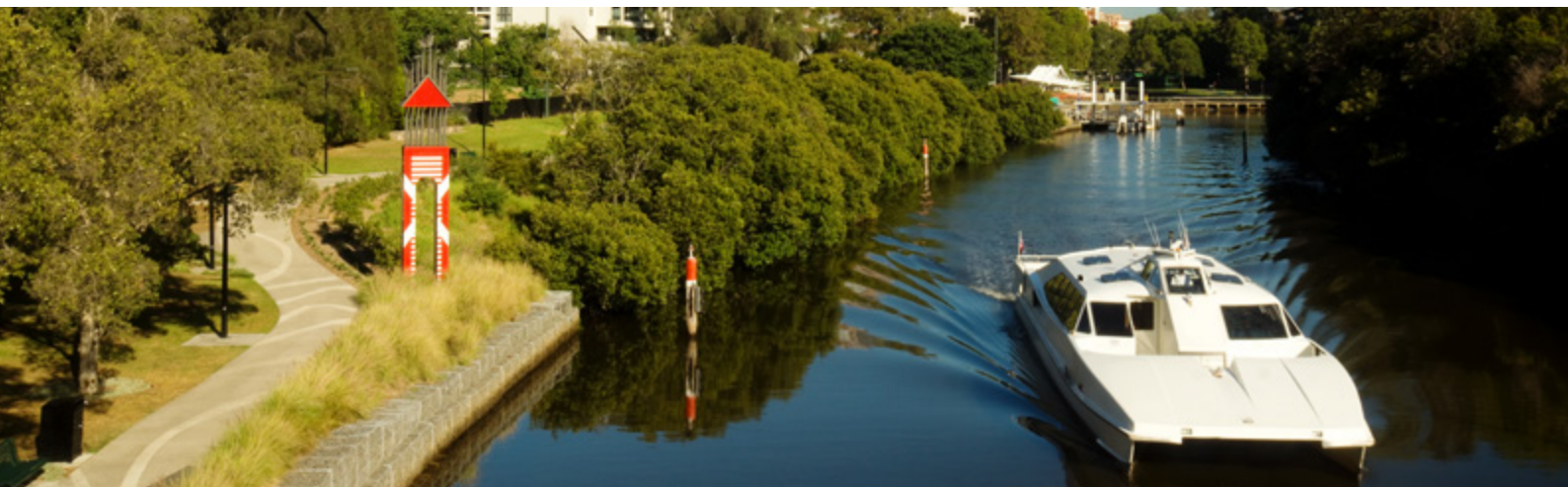
The Central River City is becoming a thriving centre, with a rapidly growing population and economy. Great opportunities exist to build upon both its already established and its developing precincts (such as health care and education). The Central River City will benefit from investment into meaningful cultural activities and entertainment facilities to promote people's enjoyment and wellbeing, as well as to build community. We support more investment in 'play', in line with *CityPulse* data, including greater development of the Central River City's unique and diverse culture.

The Western Parkland City presents vast opportunities in all areas of 'live', 'work' and 'play', particularly given the lack of essential infrastructure in a large area of the Western Parklands. Getting the balance of 'live', 'work' and 'play' right is essential to the success of the Western Parkland City, and demands careful strategic planning underpinned by data. The Liverpool and Penrith precincts are already established, but they could be better connected with the Central River City and the proposed WSA. These areas need more investment and efforts to increase their liveability through holistic precinct planning and attracting thriving industries. The Badgerys Creek area presents a unique opportunity to build a thriving new precinct around the proposed airport, offering jobs, homes and services, while also providing a new international gateway to Sydney.

Sydney is a global, vibrant city. But as *CityPulse* shows us, Greater Sydney faces a number of challenges, which will only become bigger as our population comes close to doubling by 2050.

PwC understands the urgency around tackling these challenges and we are playing an active role in bringing people together to help solve the big issues. This starts with conversations supported by *CityPulse Sydney*, and will take the strength of all of us working together - government, business, and our community.

Great cities don't just happen by chance; we look forward to working together in building our three cities of the future and playing an active role in making liveable, doable.



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