URBIS

GREATER MACARTHUR

Employment Lands Study

Prepared for Walker Corporation & Mirvac
June 2022

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

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Urbis acknowledges the important contribution that Aboriginal and Torres Strait Islander people make in creating a strong and vibrant Australian society.

We acknowledge, in each of our offices, the Traditional Owners on whose land we stand.

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CONTENTS

EXECUTIVE SUMMARY

In preparing this study, Urbis has considered two population scenarios. The base case scenario represents the populations consistent with the Wilton 2040 Plan and the Greater Macarthur 2040 Interim Plan. The high case scenario provides a sensitivity test to ensure the study accounts for the impact (in terms of land required for employment needs) arising from a higher population.

Our assessment of demand for employment generating uses within the study area identifies potential to create 39,500 to 43,600 jobs consisting of full-time, part-time and casual jobs. The study area includes Greater Macarthur and Wilton Growth Areas. Employment is forecast to comprise of :

- 29,700 to 33,700 jobs linked to serving the needs of the localised population. This will include retail, education, community services and health related uses. A proportion of this employment is also likely to come from home-based employment and lower land intensive uses such as utilities, maintenance and construction.
- Around 19,800 jobs to be driven by strategic related employment uses expected to serve the needs of the local and broader regional population. It is important to note that the difference in the number of strategic related jobs, between the base and high case scenarios is approximately 100. This will primarily come from:
  - Industrial land to consist of local and urban support services, manufacturing and distribution businesses.
  - "Out of the Box" tourism related uses such as an adventure theme park or biosphere. They have the potential to generate high visitation into the region, and provide substantial flow-on effects to local businesses
  - Knowledge based industries such as health (private hospital) and higher education (TAFE).

The ability of a region to attract employment opportunities is underpinned by a number of factors. Its competitive advantages compared to other regions are key to attracting employment generating opportunities. A Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis of the GMGA and Wilton Growth Area illustrates the region's abundant supply of serviced land and projected strong population growth as key factors it can leverage to attract employment generating uses.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Availability of land	Significant separation from current urban front	Large population on completion	Competition from Western Sydney Aerotropolis
Motorway connectivity via Hume Motorway and future Outer Sydney Orbital	Limited existing amenities	Developer interest	Technology impacts on labour
Existing freight line and (partial) commuter rail)	Limited public transport provision	Growth of Western Sydney	Untested employment market for certain uses
Areas of scenic quality		Proximity to Illawarra and Port Kembla	Long term take-up
Existing industrial land provision at Maldon and potential industrial and employment land provision at Moreton Park Road.			
Government ability to leverage strategic / destinational investment			

EXECUTIVE SUMMARY

Local Population Driven Employment (2056)	Jobs Base Case	Jobs High Case
Retail	6,500	6,500
Commercial Office	1,790	2,660
Education	4,040	5,870
Community Services	1,390	2,140
Health Centres	90	190
Aged Care	150	240
Recreational	340	450
Home Workers	10,700	10,700
Construction	2,500	2,500
Public Administration	400	400
Utilities (Electricity, Water, Gas, Internet)	400	400
Property Maintenance Services	600	600
Waste Collection Services	100	100
Correctional Services	200	200
Security/Investigation Services	300	300
Total – Local Population Driven	**29,700**	**33,700**

Strategic Related Employment (2056)	Jobs Base Case	Jobs High Case
TAFE	200	250
Private Hospital (50-100 beds)	200	300
Hotel (100 rooms)	61	61
Serviced Apartment (100 rooms)	61	61
Hotel (50 rooms)	61	61
Destinational F&B	196	196
Industrial Park	18,500	18,500
Adventure Theme Park	250	250
Biosphere	250	250
Total - Strategic	**19,800**	**19,900**

INTRODUCTION

Purpose

Urbis has been appointed by Walker Corporation and Mirvac to update the 2017 employment lands study for the Greater Macarthur Region with consideration for new planned precincts in both Greater Macarthur and Wilton Growth Area since 2017, as well as the announcement of new and potential infrastructure projects. This appointment has been facilitated through Walker Corporations involvement as one of the Department of Planning and Environment's Technical Assurance Panel pilot program.

The scope of work includes the following:

- Assessment of population driven employment
- Consideration of strategic uses and employment potential.

Assumptions

The analysis considers two scenarios in relation to the scale of residential development within the study area, as follows:

- The base-case scenario adopts the dwelling potential identified in the Greater Macarthur 2040 and Wilton 2040 reports
- The high-case scenario presents a stronger view on dwelling capacity and allows for 50% more dwellings than the base case.

Other key assumptions include the following:

- The average household size for new dwellings is 2.85 persons per household
- The timing of delivery of dwellings is assumed to be constant under both scenarios (i.e. the high-case assumes a stronger annual take up rate)
- The population threshold benchmarks used in the previous 2017 have been adopted.

01

GREATER MACARTHUR: LOCATION & CONTEXT

LOCAL AND REGIONAL CONTEXT

Greater Macarthur & Wilton Priority Growth Area

Greater Macarthur Growth Area is composed of 12 precincts: seven urban renewal precincts from Glenfield to Macarthur and five land release precincts to the south of Campbelltown. The plans for most urban renewal precincts have been finalized and the draft Special Infrastructure Contributions schemes have been developed to assist fund state infrastructure to support new homes and jobs.

In order to promote growth in the Greater Macarthur and Wilton area, the NSW Department of Planning and Environment has prepared Greater Macarthur 2040 and Wilton 2040 to outline the strategic planning framework. The framework looks into the developments of transport, housing and other amenities with considerations for the landscape associated with each precinct.

Greater Macarthur 2040 Plan identifies development opportunities across 12 precincts with delivery of up to 54,000 new homes in Menangle Park, Gilead and West Appin; and Wilton 2040 Plan identifies delivery of up to 15,000 new homes across its six precincts.

The land release precincts will be serviced by well-located local centres together with smaller facilities within the neighbourhood, providing community services, shopping and dining options to the future residents.

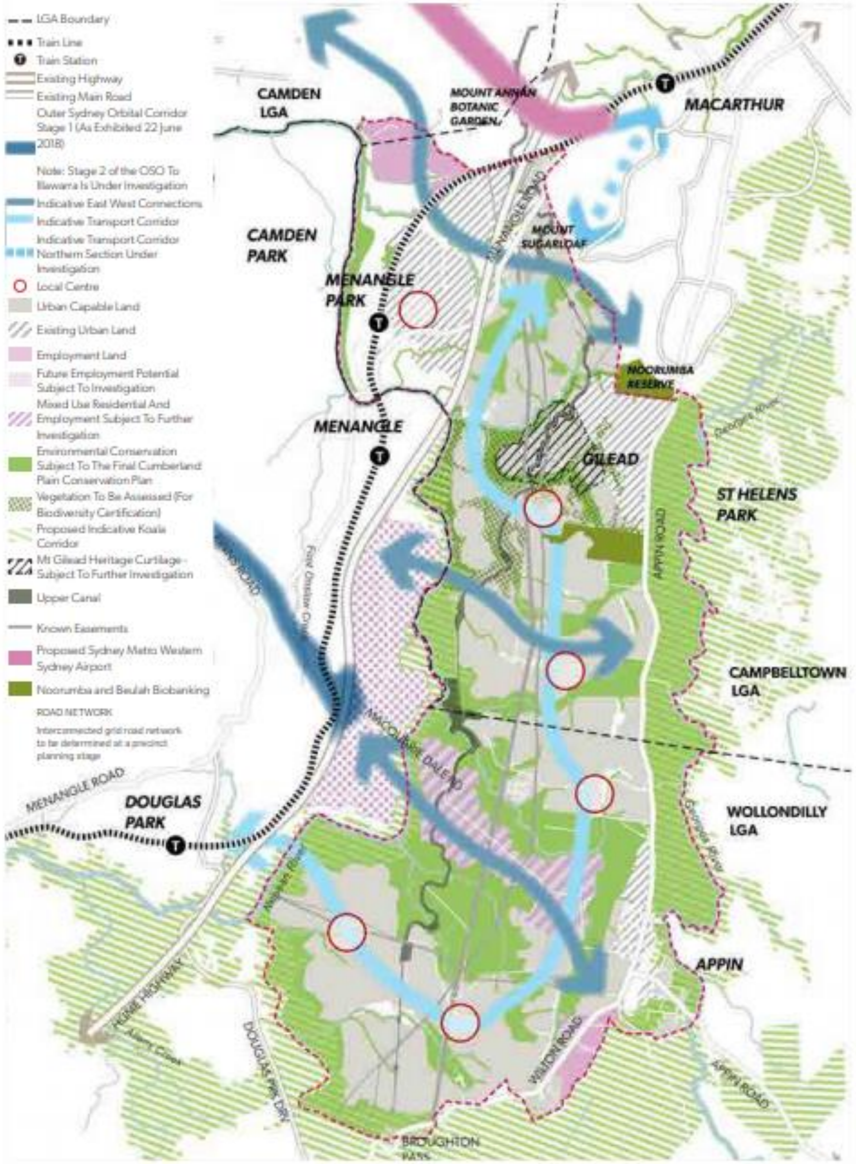
The document states that Gilead and Menangle Park are unlikely to have any major centre development due to their proximity to Campbelltown-Macarthur area. However, Appin and North Appin have the potential for the local centres to be developed into strategic centres.

Wilton Growth Area has an earmarked major centre that will support around 50,000 sq.m of retail, commercial and community uses, including full-line supermarkets, specialty stores and has identified a network of village centres with capacity for up to 20,000 sq.m of retail, education and child care, health services and recreation facilities.

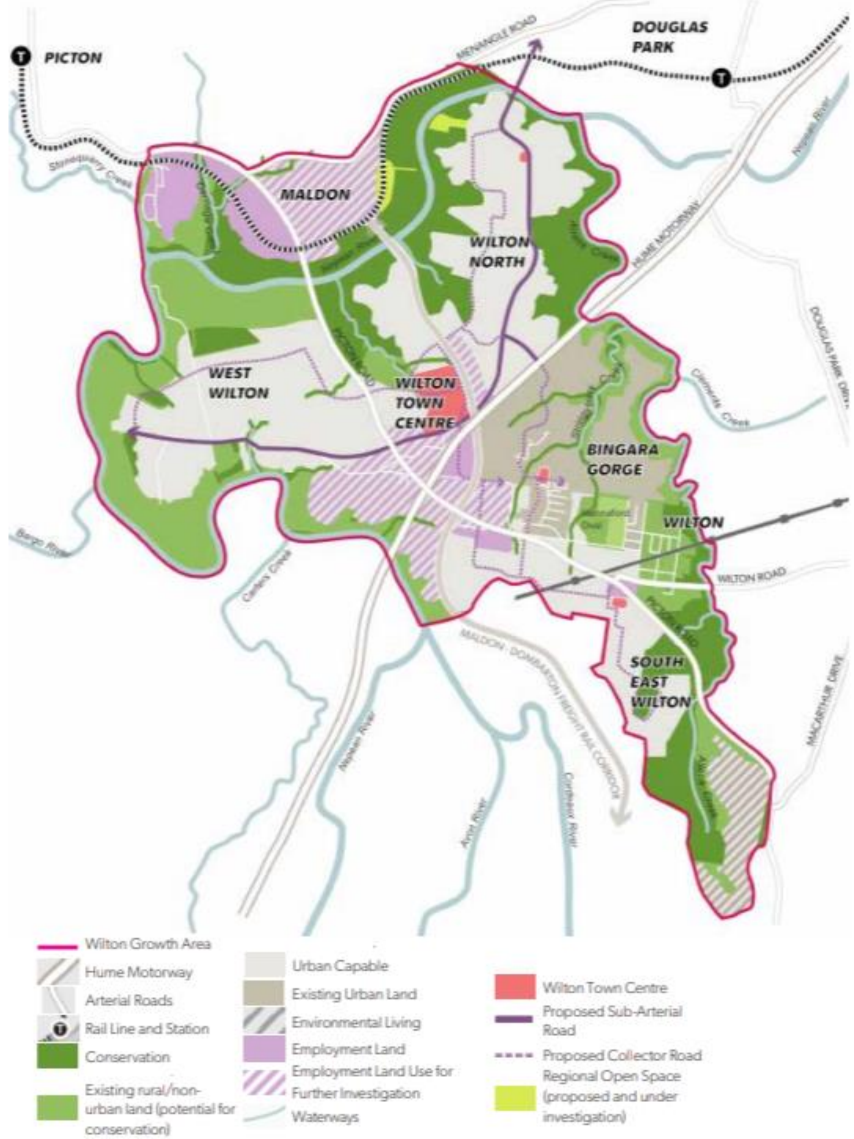
The maps on the following page illustrates the precinct defined in the 2040 reports.

GREATER MACARTHUR 2040

Greater Macarthur Structure Plan (land release areas)



Wilton



LOCAL GOVERNMENT STRATEGIC DIRECTION

Wollondilly Employment Land Study, July 2020

The Wollondilly Employment Land Study, prepared in July 2020 by Hill PDA, arrives at five key strategies and actions for employment lands within the LGA, as follows:

- **Strategy 1** – Unlock an immediate supply of employment precinct land to support the expansion of existing businesses and attraction of new businesses
- **Strategy 2** – Secure a sustainable pipeline of employment land to meet future population demand
- **Strategy 3** – Identify development barriers and work to remove them to support employment precinct sequencing and delivery
- **Strategy 4** – Create transparency and clarity in the planning system
- **Strategy 5** – Promote Wollondilly as an employment and industry destination of choice

The study acknowledges the need for future industrial and employment land supply, and indicates potential sites at Wilton, Maldon and Bargo. The study also acknowledges that additional employment land outside of these areas could be considered where there is strategic merit or to leverage infrastructure, such as the Outer Sydney Orbital, which would provide strong connections to Western Sydney Airport and Port Kembla.

The study also acknowledges that more needs to be done in the LGA to attract investment, business establishment and job creation. Large-scale facilities and precincts will assist in catalysing employment land development in the region.

Campbelltown Strategic Review of Employment Land – Strategy (Draft), August 2020

The draft Campbelltown Strategic Review of Employment Land was prepared in August 2020 by Hill PDA. The study identifies that it would be appropriate for 206 – 355 ha of land to be planned for to accommodate the projected demand in employment land and precincts over the next 20 years. It also states that the current provision of zoned land is not adequate to meet future demand requirements.

The study highlights 11 strategies and a number of key actions, as follows:

- Promote the competitive advantage of Campbelltown LGA
- Deliver a sustainable pipeline of land for employment precincts
    - An action under this strategy is to request State Government consider opportunities for employment precincts during any future Greater Macarthur Structure Plan amendments.
- Increase the capacity of existing employment precincts
- Retain employment precincts along the Glenfield to Macarthur Renewal Corridor at Ingleburn, Minto and Campbelltown
- Define a clear future role and function of Maryfields
- Define a clear future role and function for the Deferred Matter Land at Campbelltown
- Explore synergies with the local TAFE and Universities to develop training and education programs targeted to local industries.
- Encourage agglomeration and clustering
- Facilitate greater collaboration and alliances between industry and businesses
- Deliver better places of employment
- Protect the role and function of employment lands

02

EMPLOYMENT DRIVERS

EMPLOYMENT DRIVER

This chapter outlines the framework for identifying and assessing potential employment generating uses within the study area (Greater Macarthur and Wilton Growth Areas). In addition, the competitive positioning of the study area and adjoining precincts vis-à-vis the opportunities and threats in the external environment will be identified.

Towards A Regional Economic Development Strategy

A regional economic development strategy is geared towards the following:

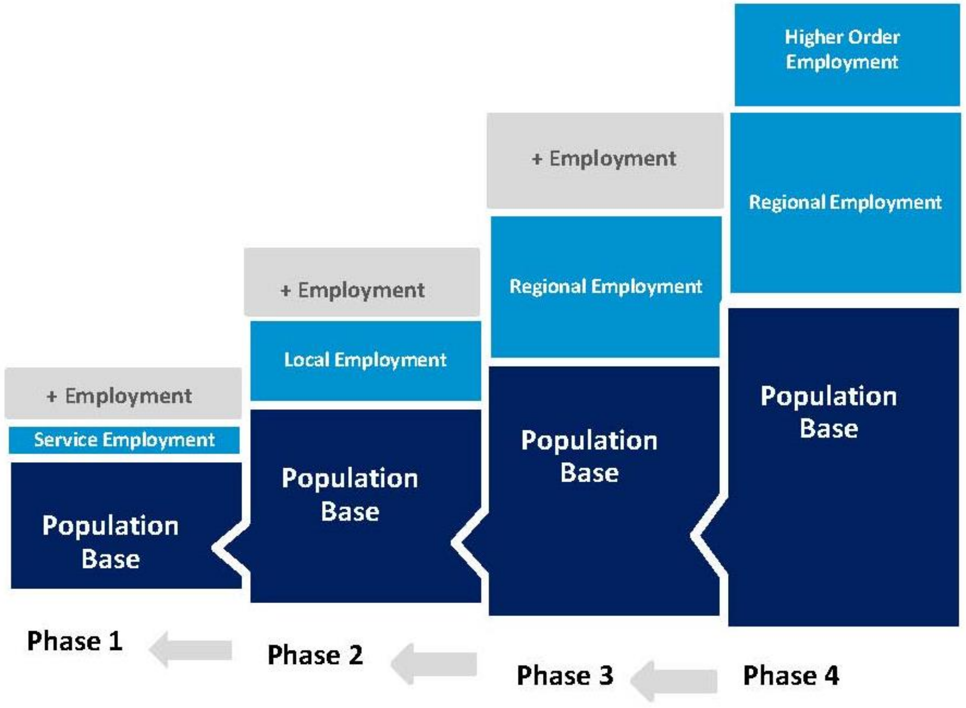
- **Regional**: In addition to the local population driven employment generated by extensive residential development, town centres within the Greater Macarthur and Wilton Growth Areas has the potential to provide strategic employment opportunities that are likely to draw from a regional catchment.
- **Development**: ground zero greenfield. The Greater Macarthur and Wilton Growth Areas will need to do something much more than a master planned residential suburban area, requiring a far greater commitment to creative, long term and comprehensive development to accelerate demand.
- **Strategy**: this needs big picture thinking and appreciation of the Greater Macarthur and Wilton Growth Areas' strategic positioning relative to the regional, metropolitan and state wide context. The political, economic, social and technology influences will be considered and drawn together to find and create strategic opportunities. An understanding of commercial realities, the capability and capacity of market competitors is a further critical influence on developing a strategy.

The development of greenfield sites depends on the establishment of employment opportunities over time. This will ultimately be guided by NSW DPE and stakeholder planning requirements across the Greater Macarthur and Wilton Growth Areas.

Historically, employment has been difficult to achieve in suburban areas of the capital cities around Australia. Conceptually we all know what is – local employment has many advantages; economic, social and environmental.

An ideal model for development across new land release can be illustrated in the graphic below.

Potential Approach to Employment Staging



SWOT ANALYSIS

The table below summarises the key strengths the study area and the adjoining precincts can leverage and weaknesses that must be addressed to take advantage of opportunities and mitigate risks in the external environment in terms of attracting employment generating land uses.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Availability of land	Significant separation from current urban front	Large population on completion	Competition from Western Sydney Aerotropolis
Motorway connectivity via Hume Motorway and future Outer Sydney Orbital	Limited existing amenities	Developer interest	Technology impacts on labour
Existing freight line and (partial) commuter rail)	Limited public transport provision	Growth of Western Sydney	Untested employment market for certain uses
Areas of scenic quality		Proximity to Illawarra and Port Kembla	Long term take-up
Existing industrial land provision at Maldon and potential industrial and employment land provision at Moreton Park Road.			
Government ability to leverage strategic / destinational investment			

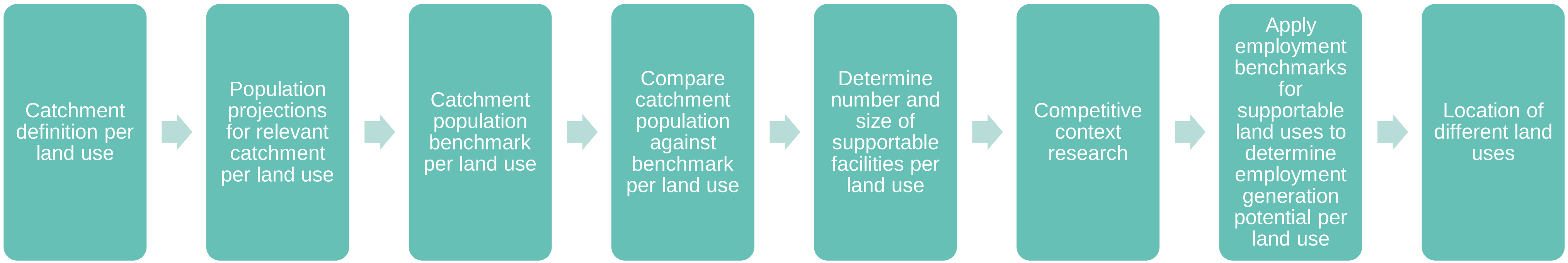
METHODOLOGY FOR IDENTIFYING FUTURE EMPLOYMENT OPPORTUNITIES

The chart below provides a summary of the approach we have taken in this report to identify future employment opportunities within the study area and adjoining precincts.

The key steps are as follows:

- A catchment is defined per land use
- Population projections are compiled for the relevant catchment per land use
- The number of residents required within a catchment per land use are researched
- The population projections in the catchment per land use is compared to the benchmark population required to support each land use to determine the type, scale and number of employment generating land uses that can be supported within the study area
- The competitive context per supportable land use is researched to determine whether existing facilities may have latent capacity and are well positioned to cater for part of the demand from the future growth areas residents
- Once the number and scale of employment generating land uses that can be located within the growth areas is determined, employment densities are applied to each facility to determine the employment generating potential of the study area.
- The potential location of the different employment generating uses are assigned by taking into account the success drivers and synergies between different land uses.

Overview of Methodology for Identifying Future Employment Opportunities in the GMGA and Wilton Growth Area



03

LOCAL POPULATION DRIVEN EMPLOYMENT

POPULATION GROWTH ASSUMPTIONS AND STUDY AREA

Future population forecasts for the Greater Macarthur Growth Area have been revised from initial population forecasts provided in the *Greater Macarthur Future Employment Analysis* study. Urbis has adopted number of dwellings to align with the Greater Macarthur and Wilton 2040 Interim Reports.

The following assumptions have been considered:

- Bingara Gorge in Wilton Growth Area has commenced development. There are assumed to be 900 dwellings completed in 2021
- Average household size for new dwellings of 2.85 persons per household.
- Dwelling yields are based on two scenarios:
  - **Base Case:** will yield up to 54,000 dwellings by 2056.
  - **High Case:** will yield a 50% greater dwelling capacity (81,000) than identified in the interim reports.

POPULATION GROWTH ASSUMPTIONS AND STUDY AREA

Assumptions:

Future population forecasts for the Greater Macarthur and Wilton Growth Areas have been revised from initial population forecasts provided in the *Greater Macarthur Future Employment Analysis* study. Urbis has adopted number of dwellings to align with the Greater Macarthur and Wilton 2040 Interim Reports.

Base Case: will yield up to 54,000 dwellings by 2056.

High Case: will yield a 50% greater dwelling capacity than identified in the interim reports.

The following assumptions have been considered:

- Bingara Gorge in Wilton Growth Area has commenced development. There are assumed to be 900 dwellings completed in 2021
- 53,100 (base case) to 80,100 new dwellings (high case) to be built within the area with development to occur over the period to 2056
- Average household size for new dwellings of 2.85 persons per household.

Study Area:

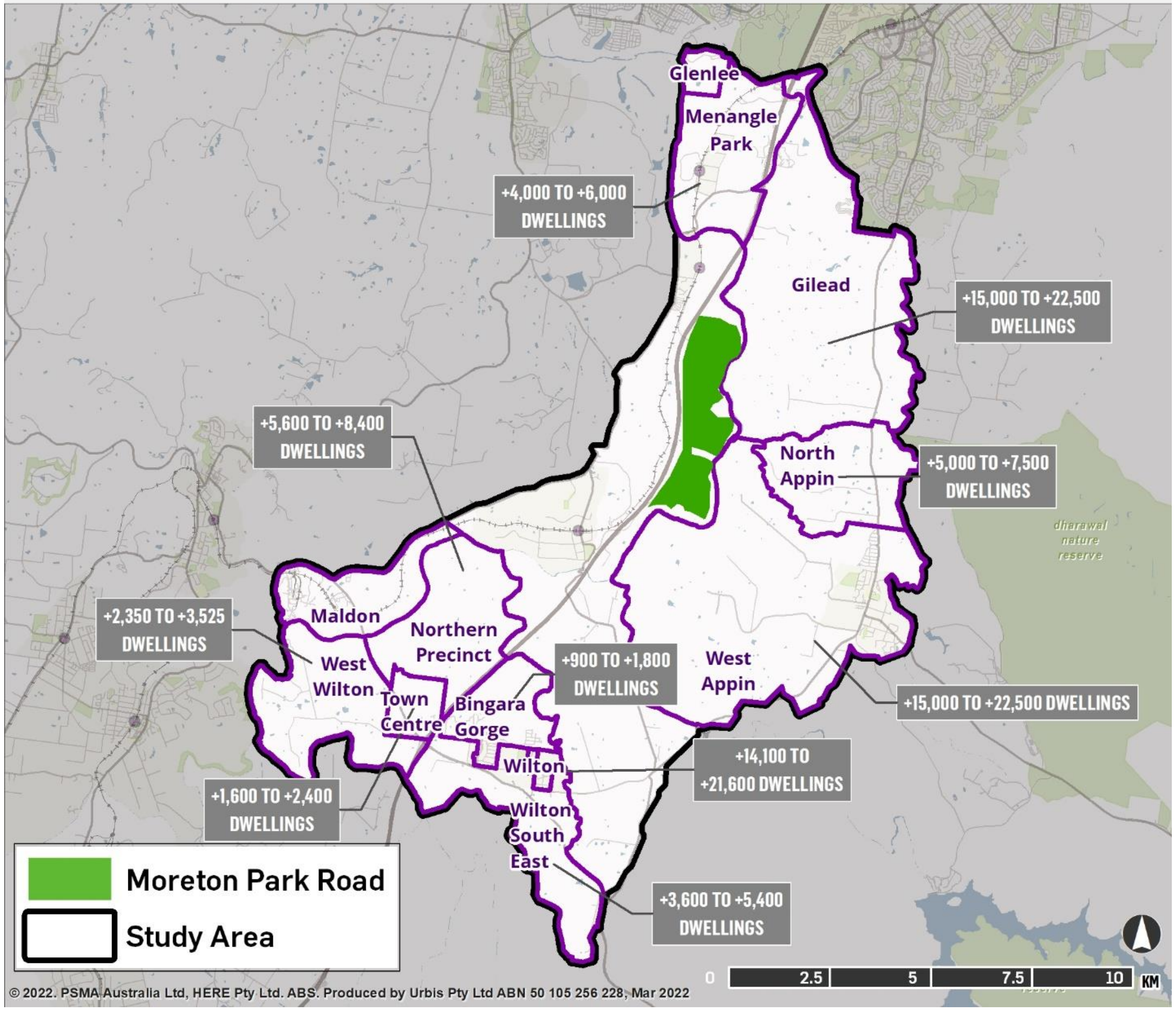
The map on the right illustrates the study area. The study area includes:

- Greater Macarthur Growth Area (GMGA) as 2040 interim report which includes Glenlee, Menangle Park, Gilead, North Appin and West Appin
- Wilton Growth Area which includes Maldon, Northern Precinct, West Wilton, Town Centre, Bingara Gorge, Wilton and Wilton South East.

In addition to new dwellings listed on the map, Wilton rural residential will also add 50 to 75 dwellings.

Moreton Park Road, shown on the map, has been identified as future employment potential land in the GMGA 2040 interim plan. Sitting along the Hume Motorway and with the proposed Outer Sydney Orbital running through the site, this precinct has the characteristics of attractive land for industrial and employment uses. This report investigates if this potential employment land is in fact required.

Study Area



DWELLING PROJECTIONS

Key Findings

The tables on the right project dwellings in a base-case and high-case scenario within the Greater Macarthur Growth Area and Wilton Growth Area based on the following dwelling completion assumptions:

- Dwelling delivery will commence in 2022.
- Menangle Park, Gilead and Wilton will deliver dwellings at an average annual rate. Menangle Park and Gilead dwellings are expected to be completed by 2040 while Wilton by 2050.
- West Appin and North Appin dwellings will be delivered through multiple stages with anticipated completion by 2056.

The base-case scenario will adopt the dwellings as indicated in the 2040 interim plan while the high-case scenario considers a 50% increase dwellings relative to the base-case.

The growth areas will have additional 53,100 to 80,100 dwellings by 2056.

Dwelling Growth – Base Case

	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Mt Gilead	5,000	10,000	15,000	19,000	19,000	19,000	19,000
West Appin & North Appin	1,200	4,900	8,600	12,500	15,000	17,500	20,000
Wilton	2,431	4,862	7,293	9,724	12,155	14,100	14,100
Total	**8,631**	**19,762**	**30,893**	**41,224**	**46,155**	**50,600**	**53,100**

Dwelling Growth – High Case

	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Gilead	7,500	15,000	22,500	28,500	28,500	28,500	28,500
West Appin & North Appin	1,800	7,350	12,900	18,750	22,500	26,250	30,000
Wilton	3,724	7,448	11,172	14,897	18,621	21,600	21,600
Total	**13,024**	**29,798**	**46,572**	**62,147**	**69,621**	**76,350**	**80,100**

POPULATION PROJECTIONS

Key Findings

The tables on the right project population in a base-case and high-case scenario within the Greater Macarthur Growth Area and Wilton Growth Area.

Based on an average household size of 2.85 persons per dwelling and assuming all dwellings will be settled upon completion, the growth areas are projected to have about 160,000 residents by 2056 under the base-case scenario and 236,000 residents under the high-case scenario.

Population Growth – Base Case

	2021	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Mt Gilead	738	14,988	29,238	43,488	54,888	54,888	54,888	54,888
West Appin & North Appin	3,118	6,538	17,083	27,628	38,743	45,868	52,993	60,118
Wilton	3,969	10,897	17,826	24,754	31,683	38,611	44,154	44,154
Total	**7,825**	**32,423**	**64,147**	**95,870**	**125,314**	**139,367**	**152,035**	**159,160**

Population Growth – High Case

	2021	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Mt Gilead	738	22,113	43,488	64,863	81,963	81,963	81,963	81,963
West Appin & North Appin	3,118	8,248	24,066	39,883	56,556	67,243	77,931	88,618
Wilton	3,969	14,583	25,197	35,810	46,424	57,038	65,529	65,529
Total	**7,825**	**44,944**	**92,750**	**140,556**	**184,943**	**206,244**	**225,423**	**236,110**

POPULATION DRIVEN EMPLOYMENT

Population driven employment will serve primarily the local resident population. In addition to providing employment to local residents, they will also contribute to the amenity of a successful release area underpinning its attractiveness to new home buyers. Some of the key local population driven employment uses are:

- Retail – food groceries, retail services and other convenience retail
- Commercial / Office – uses such as real estate agents, banks, accountants, lawyers etc.
- Education – childcare, primary and secondary school, special needs school
- Community services – community centre, library, youth centre, place of worship, emergency services
- Health Centres – medical centres
- Aged Care – residential aged care and independent living units
- Recreational – indoor sport and recreational centre, cinema, gym.

Given the end user of these services are the same group, the resident population, co-location of most of these uses within a town centre would reinforce demand for each use, contributing to establishing a vibrant hub for the community and provide residents a convenient destination to undertake multipurpose trips.

Different land uses servicing future residents can improve the value of the release land to prospective purchasers and contribute to providing employment to residents, and ensures that the release does not purely become a dormitory suburb'. Locating the mix of services proposed within centres in the Greater Macarthur and Wilton Growth Areas improves its critical mass, destinational appeal and ultimately its commercial viability and employment it can support.

POPULATION DRIVEN EMPLOYMENT PROJECTIONS AT CAPACITY

The table opposite outlines the total employment supportable when the study area reach capacity. At capacity, the study area will support between 25,900 to 26,100 direct full-time, part time and casual jobs. Employment will primarily come from:

- **Centres:** proposed centres network (from *Greater Macarthur Retail Analysis*) has potential to generate around 6,500 direct jobs. This includes a bulky goods precinct, which is expected to provide 500 direct jobs.
- **Outside of Centres:** employment uses to be located along retail strips and on ancillary employment zoning within town centres
- **Other employment:** employment uses that may not necessarily require land within centres or outside of centres i.e. home workers, construction, maintenance services, waste collection services.

At full development, the study area population has the potential to support the following uses:

- **Retail**: 12 retail centres comprising around 140,000 sq.m total retail floorspace (2 sub-regional and 10 supermarket-based centres), and a bulky goods precinct.
- **Commercial**: Between 35,800 sq.m to 53,100 sq.m of commercial floorspace, to be located within and around the centre. This would be suitable for businesses servicing a local population base, likely in the form of smaller strata offices.
- **Education**: 17 to 27 childcare facilities, 18 to 26 primary schools, 7 to 10 secondary schools and 3 to 5 special needs schools.
- **Community Services:** 8 to 12 local community centres, 3 to 4 regional community centres, 4 to 6 libraries, 8 to 12 youth centres, 3 to 4 club/pub premises and 11 to 17 emergencies service hubs (ambulance, fire and police).
- **Health Centres:** 12 to 25 medical centres. A proportion of these centres would be attributed to non-retail uses within retail centres.
- **Aged Care:** 8 to 12 residential aged care facilities and 8 to 12 independent living unit facilities. There is potential to provide co-located residential aged care and independent living unit facilities.
- **Recreational:** 3 to 5 indoor sports and recreational centre, 4 to 6 aquatic centres and 14 to 20 gyms (with potential for these uses to be integrated into larger recreational centres), and 4 to 5 cinemas.

Local Population Driven Employment at Capacity

	Jobs Base Case	Jobs High Case
Retail	6,500	6,500
Commercial Office	1,790	2,660
Education	4,040	5,870
Community Services	1,390	2,140
Health Centres	90	190
Aged Care	150	240
Recreational	340	450
Home Workers	10,700	10,700
Construction	2,500	2,500
Public Administration	400	400
Utilities (Electricity, Water, Gas, Internet)	400	400
Property Maintenance Services	600	600
Waste Collection Services	100	100
Correctional Services	200	200
Security/Investigation Services	300	300
Total – Local Population Driven	**29,700**	**33,700**

LOCAL POPULATION DRIVEN EMPLOYMENT

	Indicative Total Supportable Facilities at Capacity Base-High Case (No.)	Total Floorspace Required at Capacity (sq.m)	Employment Potential	Employment per 1,000 sq.m floorspace
Retail*		168,300	6,500	39
Commercial				
Offices		35,800 - 53,100	1,790 - 2,660	50
Education				
Child Care	17 - 27	11,900 - 18,900	170 - 260	14
Primary School	18 - 26	99,000 - 143,000	2,080 - 3,000	21
Secondary School	7 - 10	122,500 - 175,000	1,590 - 2,280	13
Special Needs School	3 - 5	16,500 - 27,500	200 - 330	12
Total – Education	**45 - 68**	**249,900 - 364,400**	**4,040 - 5,870**	**16**
Community Services				
Community Centre(Local)	8 - 12	3,200 - 4,800	60 - 100	19
Community Centre (Civic / Regional)	3 - 4	4,200 - 5,600	110 - 140	26
Library	4 - 6	9,600 - 14,400	120 - 170	13
Youth Centre	8 - 12	6,000 - 9,000	80 - 130	13
Place of Worship	20 - 30	10,000 - 15,000	40 - 60	4
Club	3 - 4	7,500 - 10,000	200 - 270	27
Emergency Services (Ambulance)	2 - 3	10,000 - 15,000	60 - 90	6
Emergency Services (Fire)	6 - 9	30,000 - 45,000	150 - 230	5
Emergency Services (Police)	3 - 5	15,000 - 25,000	570 - 950	38
Total – Community Services	57 - 85	95,500 - 143,800	1,390 - 2,140	15
Health Centres				
Medical Centre	12 - 25	6,000 - 12,500	90 - 190	15
Aged Care				
Residential Aged Care	8 - 12	4,000 - 6,000	110 - 170	28
Independent Living Units	8 - 12	4,000 - 6,000	40 - 70	10
Total – Aged Care	16 - 24	8,000 - 12,000	150 - 240	19
Recreational				
Indoor Sport & Recreation Centre	3 - 5	7,500 - 12,500	110 - 190	15
Aquatic Centre	4 - 6	10,000 - 15,000	100 - 150	10
Gym	14 - 20	6,800 - 9,800	180 - 250	27
Cinema	4 - 5	16,000 - 20,000	160 - 200	10
Total – Recreational	25 - 36	40,300 - 57,300	340 - 450	8

POPULATION THRESHOLD BENCHMARKS

Key Findings

The table on the right outlines the population thresholds used to estimate the employment uses that will serve the local population. Thresholds have been sourced from internal Urbis benchmarks and various Growth Centre precinct draft structure plans across New South Wales and Queensland. Examples of sources include:

- Social Infrastructure Assessment for Vineyard Precinct Stage 1 (2016) – Elton Consulting
- Social Infrastructure Assessment Riverstone East Precinct (2015) – Elton Consulting
- South East Queensland Regional Plans Infrastructure Guidelines (2015) – Economic Development Queensland
- Greater Macarthur Social Infrastructure Assessment (2016) – GHD.

For consistency, these thresholds are the same as reported in the 2017 Greater Macarthur Employment Study.

Population Driven Uses

	Population Threshold (residents per facility)
Retail	Derived from Urbis Greater Macarthur, Wilton and West Appin Retail Analysis
Commercial Office	0.3 sq.m per resident
Education	
Child Care	8,000
Primary School	9,000
Secondary School	24,000
Special Needs School	47,600
Community Services	
Community Centre(Local)	20,000
Community Centre (Civic / Regional)	60,000
Library	40,000
Youth Centre	20,000
Place of Worship	8,000
Emergency Services (Ambulance)	80,000
Emergency Services (Fire)	25,000
Emergency Services (Police)	50,000
Health Centres	
Medical Centre	6,000
Aged Care	
Residential Aged Care	20,000
Independent Living Units	20,000
Recreational	
Indoor Sport & Recreation Centre	50,000
Aquatic Centre	40,000
Gym	6,000
Cinema	44,000

04

STRATEGIC EMPLOYMENT USES

STRATEGIC EMPLOYMENT USES

Key Findings

This section explores the potential to support strategic employment uses that serve a regional catchment area. The uses identified include:

- Tertiary Education such as a TAFE
- Private Hospital
- Industrial Precinct(s)
- Tourism i.e. Hotel, Theme Park, Eco-tourism, destinational F&B precinct.

Other employment uses such as university, business park and public hospital have been assessed. However, these uses are not considered supportable in this region.

The table on the right shows that a total of 19,800 to 19,900 strategic related jobs could be supported in the study area. A detailed investigation of each land use is provided in the following sections.

Strategic Related Employment at Capacity

	Jobs Base Case	Jobs High Case
TAFE	200	250
Private Hospital (50-100 beds)	200	300
Hotel (100 rooms)	61	61
Serviced Apartment (100 rooms)	61	61
Hotel (50 rooms)	61	61
Destinational F&B	196	196
Industrial Park	18,500	18,500
Adventure Theme Park	250	250
Biosphere	250	250
Total - Strategic	**19,800**	**19,900**

4.1 INDUSTRIAL

INDUSTRIAL LANDS

There is potential to generate an additional 16,500 new industrial lands related jobs in the study area, noting the capability of Moreton Park Road, Maldon, and other industrial lands. The precinct is likely to comprise a large clustering and range of uses serving the local and wider region (Wollongong, Southern Highlands) to include:

- Strata/office warehouse and manufacturing: expected to be the dominant typology within the precinct
- Local services: such as automotive services, home services and recreation related services
- Light Industry: light manufacturing and small scale production
- Heavy Industry: existing Boral Concrete manufacturing plant
- Urban Services: power/electricity supply, bus depot.

A successful industrial precinct in the study area should be highly accessible, well-buffered and well-presented with significant potential to cater to future demand.

Existing Industrial Land:

The Employment Lands and Development Program (ELDP) 2020 Monitor identifies around 212 hectares of industrial land currently zoned in the study area. Existing industrial land is located at Maldon (160 hectares), Menangle Park (28 hectares), adjacent to Hume Motorway in Wilton (13 hectares) and Appin (11 hectares). Future potential industrial land is also identified at Glen Lee to the north of the study area and is also identified for investigation at the Moreton Park Road Precinct, along Moreton Park Road and the Hume Motorway at the proposed Outer Sydney Orbital interchange.

Maldon

Maldon is a 160.3 ha precinct, of which around 32% has been developed to date. Key existing uses in the precinct include the Boral cement works, with access to the freight rail line.

Appin

The existing Appin industrial precinct comprises 10.5 ha, with 9.4 ha (around 90%) having been developed to date. Uses include masonry products, automotive repair and parts, self-storage and other industry.

Condell Park Road (Wilton)

The Condell Park Road precinct occupied 13.4 ha, of which 70% (9.4 ha) has been developed.

Industrial Land for Investigation:

The Greater Macarthur 2040 report identifies a number of precincts as investigation areas for industrial uses, including the following:

Moreton Park Road:

The key characteristics of the Moreton Park Road Precinct are summarised below:

- Moreton Park Road Precinct is strategically located adjacent to the Hume Motorway (M31), connecting to Port Botany
- The future Outer Sydney Orbital (Stage 1) is identified to commence adjacent to the Moreton Park Road Precinct and an interchange with the Hume Motorway has also been proposed within the precinct, providing strong connectivity to the future Western Sydney Airport and to the Western Parkland City.
- The future Outer Sydney Orbital (Stage 2) corridor will dissect the Moreton Road and West Appin precinct, further connecting to Port Kembla and the Illawarra region. Over the long term, Port Kembla has been identified as NSW’s next container port, which has concept approval.
- Strong levels of accessibility to Appin Road and east-west within the Gilead and Appin areas via the east west connecting road identified in the GMGA draft SIC plan, which also includes an interchange with the Hume Motorway within the site.
- Proximity to the great southern railway line to the west.
- Moreton Park Road has an extensive ~255 ha of land that can be developed (excluding roads and services) for industrial and employment uses.
- Moreton Park Road is strategically positioned to support future employment land uses (including warehousing, logistics, office, business park and industrial), and given the existing and proposed infrastructure in the area, has the potential to service the immediate GMGA, the southern highlands, western Sydney and the Illawarra.
- The seven key characteristics described above make the Moreton Park Precinct well-placed to be able to meet the future demand for industrial and employment lands in the region.

Wilton

The Wilton 2040 report identifies the area near the Hume Motorway and Picton Road as an area for investigation. Key features include:

- Proximity to the Hume Motorway and Maldon precinct
- Proximity to the future Wilton New Town
- Access to Wollongong via Picton Road.

INDUSTRIAL LANDS

Metropolitan Sydney Context

It is important to assess the competitive positioning of the Greater Macarthur and Wilton Growth Areas against major industrial precincts across Metropolitan Sydney that have capacity to accommodate additional growth, and have strong locational characteristics to attract tenants.

Urbis has identified a number of major industrial precincts across Metropolitan Sydney:

- Eastern Creek (532 hectares)
- Moorebank (492 hectares)
- Marsden Park (208 hectares)
- WSEA (7,914 hectares).

These precincts include a large component of undeveloped industrial land, which is able to absorb demand from new business creation and industrial users that require larger premises to operate.

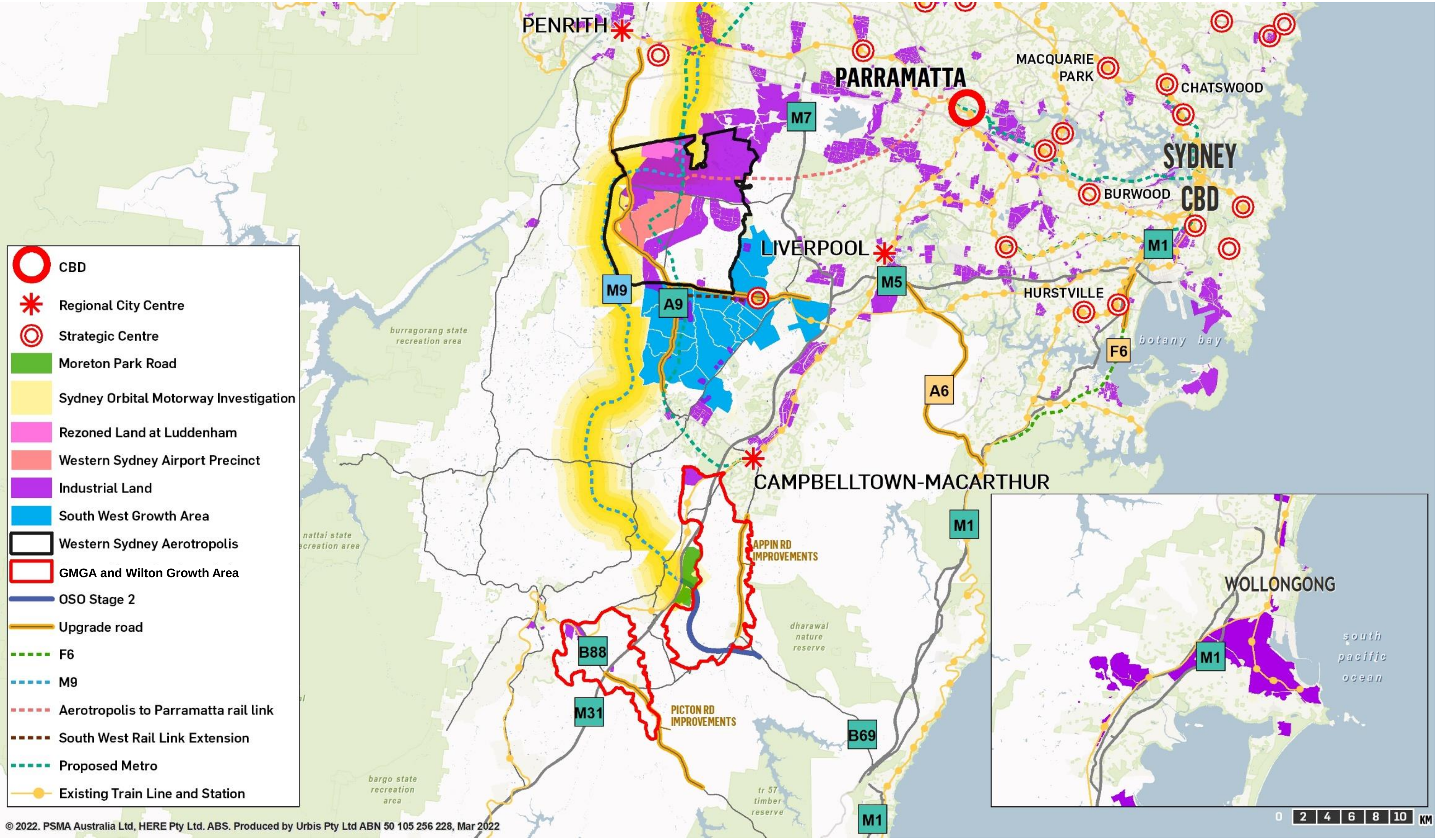
The following map and tables provide an assessment of the competitive positioning of a selection of precincts relative to the Greater Macarthur and Wilton Growth Areas.

There are a number of competitive advantages that these precincts have over the Greater Macarthur and Wilton Growth Areas:

- B-double truck access
- Proximity to key infrastructure (motorway access, Moorebank Intermodal Terminal, Port Botany)
- Significantly higher amount of undeveloped land
- Flat land, limited physical constraints.

It is noted that the future Outer Sydney Orbital (Stages 1 and 2) will vastly improve the overall connectivity of the GMGA, in particular the Moreton Park Road precinct, which will have improved access to the Aerotropolis and Port Kembla/Illawarra.

INDUSTRIAL MAP



COMPETITIVE POSITIONING RELATIVE TO OTHER INDUSTRIAL PRECINCTS

	STUDY AREA*	WSEA	MOOREBANK	WETHERILL PARK/YENNORA	HUNTINGWOOD	MARSDEN PARK INDUSTRIAL
Overall competitive positioning	Moderate / Strong	Strong / Excellent	Strong	Moderate / Strong	Strong	Moderate
Current Use	• Main current zoned industrial precinct at Maldon is used for concrete batching • Small scale uses at Appin, primarily servicing local residents through automotive services, self-storage and light industry	• Single largest industrial area in Metropolitan Sydney • Mainly warehouses servicing transport, logistics, warehouse and national distribution centres • Trend towards larger warehouses to support technology advancements in industrial facilities • Development concentrated in Eastern Creek, Smeaton Grange, Erskine Park, Glendenning, Campbelltown Blaxland Road and Huntingwood West	• Second largest industrial precinct in the Liverpool LGA • Moorebank is an established precinct with a range of uses including manufacturing, automotive, distribution and warehousing • Intermodal development will secure long term positioning of Moorebank as a key strategic freight centre	• Wetherill Park is a mature precinct with diverse uses including manufacturing, local services, automotive, distribution, warehousing • Yennora is dominated by distribution centres. The single largest facility is Stockland Distribution Centre	• Main function is for logistics and distribution • Tenants are predominately transport or distribution organisation and include Toll IPEC, IMEX Shipping, Metcash and Asahi. The tenant profile has similarities with broader WSEA	• No industrial yet, established business park, mainly functions as bulky goods precinct • Economic foundation of North West Growth Centre, demand reliant on population growth • Rezoning to industrial has been fast tracked under the Government's Precinct Acceleration Program

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

COMPETITIVE POSITIONING RELATIVE TO OTHER INDUSTRIAL PRECINCTS

	STUDY AREA*	WSEA	MOOREBANK	WETHERILL PARK/YENNORA	HUNTINGWOOD	MARSDEN PARK INDUSTRIAL
Access to motorway	• The identified investigation precincts of Moreton Park Road and Wilton sit along Hume Motorway and have the potential for stronger, direct motorway access than existing precincts. • Maldon is close to Hume Motorway	• Proximity to regional infrastructure corridors, direct access to M4, M7 corridor and key interchanges supports access to key distribution nodes, i.e. Ports • Future: Potential outer Sydney north south orbital (under investigation)	• Direct access to the M5 Motorway.	• Yennora Precinct is 4.9 km from the M4 Motorway, and therefore not direct access • Wetherill Park distance to M7 is 4.0 km	• Located near M4/M7 junction	• Good access to M7 via Richmond Road, and orbital network • Benefited from Richmond Road upgrade • Future: Potential outer Sydney north south orbital (under investigation) will improve connections with WSEA and SWGA
Access to strategic infrastructure	• Freight line through Maldon • Future Outer Sydney Orbital through Moreton Park with connectivity to Aerotropolis, Port Kembla and Illawarra region • 30 kms to Port Kembla	• Orbital network connects with Ports, though long distance from these • Future: Intermodal and freight line at Eastern Creek, and Moorebank Intermodal • Future: Directly south of future transport gateway, Badgerys Creek Airport Precinct	• Motorway links Precinct to Port Botany and Sydney Airport • On dedicated South West Freight Line • Future Intermodal (currently under construction) will have annual capacity for	• The Yennora Train Station is directly south east of the Precinct • Yennora has an intermodal facility, though not on a dedicated freight line • No train station at Wetherill Park	• Direct access to Orbital network	• Future access to Metro Sydney train station (however closest is Rouse Hill) • Access to Metro Sydney train station (however closest is Schofield)

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

COMPETITIVE POSITIONING RELATIVE TO OTHER INDUSTRIAL PRECINCTS

	STUDY AREA*	WSEA	MOOREBANK	WETHERILL PARK/YENNORA	HUNTINGWOOD	MARSDEN PARK INDUSTRIAL
Separation from sensitive noise receptors	• In planning stages, opportunity to ensure separation and avoid land use conflicts	• Separated from other land uses, no potential conflicts	• Moorebank is also a residential suburb, and there are pockets of industrial land adjacent to residential. The majority is buffered by natural vegetation, M5 and arterial roads	• Yennora is also a residential suburb, though overall the Precinct has good separation from sensitive uses. • Wetherill Park primarily separated from sensitive uses by natural vegetation and a major arterial (The Horsley Drive)	• Predominately an industrial suburb and therefore has good separation from other uses • Framed by motorways and Great Western Highway • Buffered to the west by vegetation (Western Sydney Parklands)	• The Precinct is in the early stages of development. The separation of uses is not an issue, and addressed in the masterplan
Availability of large land parcels for expansion	• Maldon is heavily landholder constrained, which may limit opportunity for larger land lots going forward • Significant, relatively unfragmented developable land within Moreton Park Road precinct	• Significant expansion capacity • Total land = 7,914 hectares • Developed – 986 hectares • Greenfield site allows for large scale buildings and custom builds	• Total = 492 hectares • Undeveloped – 176 hectares	• Yennora Total land = 188 hectares • Limited large undeveloped sites • Wetherill Park Total land = 555 hectares • Undeveloped = 40 hectares • Only 6% undeveloped remaining	• Total land = 259 hectares • Undeveloped = 57 hectares	• Total land = 208 hectares • Undeveloped = 122 hectares

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

FUTURE INDUSTRIAL LAND

The Greater Macarthur 2040 Interim Plan identifies Moreton Park Road outside the growth area, as a potential employment area. The Wilton 2040 Plan identifies the Maldon precinct as potential employment land in the Wilton Growth Area. The future industrial land in Greater Macarthur and Wilton Growth Areas can include:

- Additional 16,500 new jobs to be located in Maldon and Moreton Park Road precincts, or other proposed residual precincts, assuming development of around 600 hectares of land
- Potential to accommodate a range of strata/office warehousing, local services, light and heavy industrial uses and urban services, as well as business park type uses
- Proximity to key infrastructure – good access to Hume Motorway
- Future key infrastructure to include Outer Sydney Orbital, to connect the precinct to the Aerotropolis and Illawarra region, as well as the potential Maldon – Dombarton freight line extension. Proposed corridors have been safeguarded by NSW government, and this is mooted to be a potential long-term project subject to funding.

4.2 EDUCATION

EDUCATION

Findings

Urbis has considered the potential for a university campus, with university providers such as Western Sydney University (WSU) and University of Wollongong (UOW) already established in the region. However, a university campus is not deemed supportable for the following reasons:

- WSU's Parramatta City campus in Parramatta Square reflects the university's vision to create community and business partnerships within the Parramatta CBD and broader Western Sydney. WSU also has another vertical campus in Liverpool CBD which was opened in early 2018.
- WSU's next vertical campus will be in the Bankstown CBD and is due to open in the second half of 2022. This development is part of the University's Western Growth strategy that looks to reshape the campus network and co-creating cities and transformative educational infrastructure across Western Sydney in partnership with industry and government.
- The 2016-2036 UOW Wollongong Campus Master Plan has focused on integrating the Keiraville (main) campus and innovation campus into an education precinct, reflecting the vision of a University City. The Master Plan also identifies the importance to consolidate land around its existing campus to accommodate future expansion opportunities. UOW will not likely pursue campus development outside of this strategy.

However, there is future potential for a district TAFE in the study area, noting strategic drivers and opportunities associated with vocational education and training.

The table below shows the performance thresholds for TAFEs across Australia. Around 50,000 residents can support a district TAFE, while a regional TAFE requires 150,000 residents. Although population thresholds indicate there is potential to support just a regional TAFE in the study area, competing TAFE provision in South West Sydney and Wollongong would impact on the future viability of a regional campus in the study area. It is likely that a portion of the study area population would initially drive TAFE enrolments within the established campuses in Campbelltown and Wollongong.

The following page highlights the key drivers that TAFE providers look for in a market and how the study area rates against these factors.

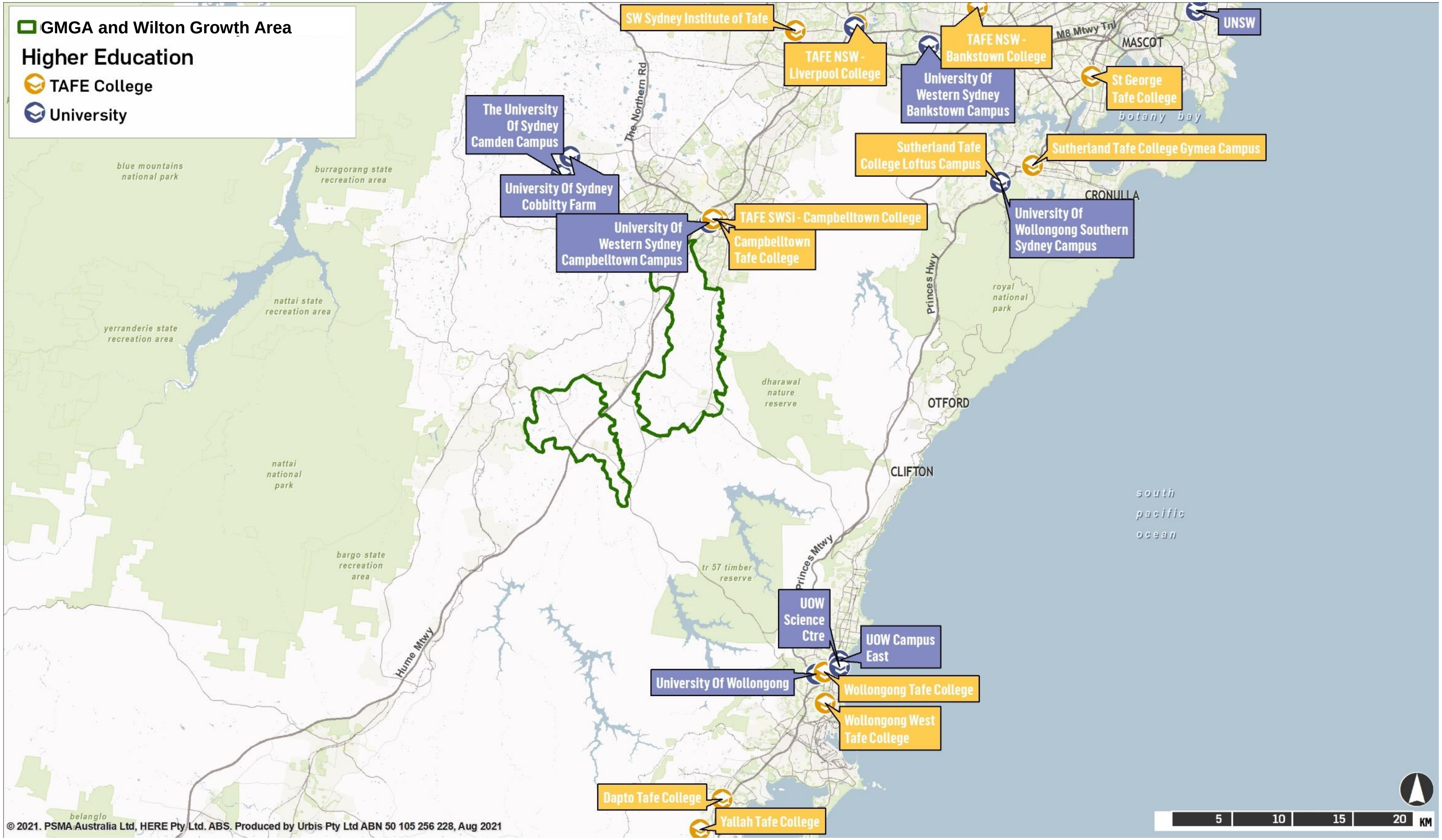
FACILITY	POPULATION THRESHOLD (RESIDENTS PER FACILITY)	INDICATIVE FLOORSPACE (SQ.M)	EMPLOYMENT
District TAFE	50,000	5,000	200 – 250
Regional TAFE	150,000	n/a	500 – 600

TAFE DEMAND DRIVERS

FACTOR	DESCRIPTION	STUDY AREA*
Competitive Environment	Provision of competing TAFE providers outside the catchment	Closest TAFEs which are quite a distance away in Campbelltown and Wollongong, potential future gap in TAFE provision
Population Catchment	The geographical spread of TAFEs largely follows the population distribution	Strong population growth and size of the residential population on completion would appeal to TAFEs
Population aged between 15 and 24	People aged between 15 and 24 comprise the key market for TAFEs	It is likely that the young population in the study area will follow the age distribution of Greater Sydney population.
Number of part-time workers	An increase in the number of part-time workers has been found to create demand for vocational education and training	Future national trends will increase the incidence of part time work and more flexible working arrangements
Secondary school drop out	Higher secondary school dropout rates have been found to increase demand for TAFE courses by school leavers, typically aged 16 to 19 years	Unknown
Skill shortages	Skill shortages stimulate demand for TAFEs	Training would be required to support employment in industrial, community services, hospitality and childcare
Access to highly skilled workforce	Providers need well-qualified staff with relevant skills and expertise to teach specific courses	Unknown
Government funding policies	Government funding for TAFEs have shifted to a demand driven model where funds follow enrolment	Growth in demand for TAFE will ultimately be generated by population growth in the study area, translating to higher funding for potential TAFEs
Access to Amenity	Proximity to retail, food and entertainment options	Integration of TAFE campuses with future centres will deliver good access to amenity for students

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

HIGHER EDUCATION MAP



4.3 HEALTH

PRIVATE HOSPITAL

Key Findings

Urbis has identified the following justification to support the operation of a private hospital, to provide between 50 to 100 beds. This is likely to be operated by a major hospital provider such as Healthscope or Ramsay Healthcare. The key reasons for selecting a private hospital as a key employment use is as follows:

- There is expected to be a gap in the future provision of private hospitals in the study area
- Strong population growth around the proposed network of centres is expected to generate high level of demand for medical facilities and services
- The ageing population will generate greater demand for hospital facilities and medical services in the future
- High employment use – generates a high number of jobs
- Flow-on effect for the rest of the local economy including demand for allied services, food catering and temporary accommodation
- Resulting improvement in amenity would serve as an effective residential attractor.

Urbis has also assessed the potential to support a public regional hospital. However, a public hospital is not considered supportable for the following reasons:

- Established health precincts in Campbelltown and Wollongong would initially service residents in the study area. Population thresholds suggest limited viability for a regional hospital, even at full capacity upon residential completion of the study area.
- $632 million Stage 2 redevelopment of Campbelltown Hospital is expected to deliver significant facility upgrades and expansion of existing facilities. This follows the $134 million Stage 1 redevelopment which delivered 90 new inpatient beds and state-of-the-art facilities. The redevelopment is currently under construction and is due for completion by 2023. NSW government's commitment to Campbelltown Hospital indicates limited funding available for new health infrastructure in the South West Sydney region.

The table below shows the performance thresholds for public and privately operated hospitals across Australia. A public hospital requires a catchment population of 250,000 residents. However, the base case scenario projects 159,160. Further the high case population scenario of 236,110 also does not meet the catchment threshold required for a public hospital. A 200-bed private hospital would require a catchment population of around 160,000 (close to population of the study area on completion under the base scenario). Under the high scenario, the population would support around 300 private hospital beds.

However, given the provision of existing hospitals outside the catchment, there is market supportability for a 50 to 100 bed hospital.

The following page provides a broad overview of the potential competitive strength and attractiveness of the study area to a private hospital provider.

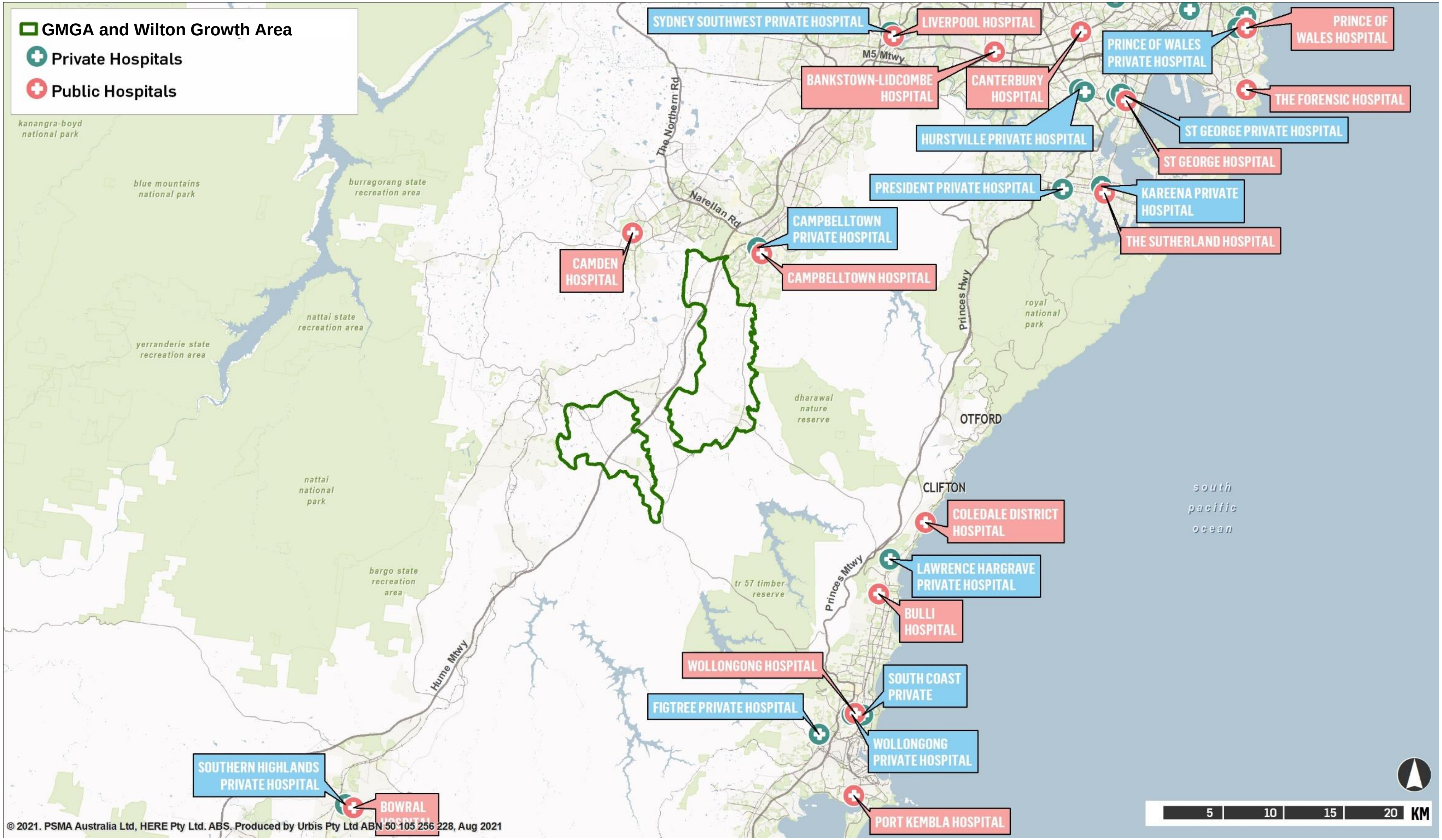
FACILITY	POPULATION THRESHOLD (RESIDENTS PER FACILITY)	INDICATIVE FLOORSPACE (SQ.M)	EMPLOYMENT
Public Hospital (Regional)	250,000	50,000	1,000 – 1,500
Private Hospital (50-100 beds)	1.3 beds per 1,000 population	15,000	200-300

HOSPITAL DEMAND DRIVERS

FACTOR	DESCRIPTION	STUDY AREA*
Competitive Environment	Provision of competing public and private hospitals outside of catchment	Campbelltown Health Precinct – Campbelltown Public and Private Hospitals Wollongong Health Precinct – Wollongong Public and Private Hospitals Camden Hospital
Population Catchment	The location of hospital beds in Australia largely reflects the population distribution	Strong population growth in the study area would appeal to private hospital operators
Population aged 55 or older	People aged over 55 years of age are more frequent users of hospital services	Australia's ageing population would generate higher demand for hospital services in the future. It is likely that the study area will follow this trend.
Number of births	Women in their child-bearing years are heavy users of hospital services	Unknown
Private health insurance membership	People on higher income tend to use health services and are more likely to be covered by private insurance	Unknown – families with younger children have a higher incidence of private insurance coverage making it appealing to a hospital operator
Total visits to a general practitioner	The cost and availability of other alternative care can affect demand for hospital services	Unknown – lower provision of alternative care services would translate to higher demand for hospital services
Access to highly skilled workforce	Ability to attract and retain quality medical, nursing and administrative staff	Unknown
Government funding and health policies	Government pays a major role in determining the location of public hospitals and in reducing or eliminating the direct cost of hospital care	No public hospital provision in the study area.

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

HEALTH MAP


GMGA and Wilton Growth Area
Private Hospitals
Public Hospitals
SYDNEY SOUTHWEST PRIVATE HOSPITAL
LIVERPOOL HOSPITAL
PRINCE OF WALES HOSPITAL
PRINCE OF WALES PRIVATE HOSPITAL
BANKSTOWN-LIDCOMBE HOSPITAL
CANTERBURY HOSPITAL
THE FORENSIC HOSPITAL
HURSTVILLE PRIVATE HOSPITAL
ST GEORGE PRIVATE HOSPITAL
ST GEORGE HOSPITAL
PRESIDENT PRIVATE HOSPITAL
KAREENA PRIVATE HOSPITAL
THE SUTHERLAND HOSPITAL
CAMPBELLTOWN PRIVATE HOSPITAL
CAMPBELLTOWN HOSPITAL
CAMDEN HOSPITAL
OTFORD
CLIFTON
COLEDALE DISTRICT HOSPITAL
LAWRENCE HARGRAVE PRIVATE HOSPITAL
BULLI HOSPITAL
WOLLONGONG HOSPITAL
SOUTH COAST PRIVATE
FIGTREE PRIVATE HOSPITAL
WOLLONGONG PRIVATE HOSPITAL
PORT KEMBLA HOSPITAL
SOUTHERN HIGHLANDS PRIVATE HOSPITAL
BOWRAL HOSPITAL
M5 Mtwy
The Northern Rd
Narellan Rd
Princes Hwy
Princes Mtwy
Hume Mtwy
kanangra-boyd national park
blue mountains national park
burragorang state recreation area
nattai state recreation area
yerranderie state recreation area
nattai national park
bargo state recreation area
royal national park
dharawal nature reserve
tr 57 timber reserve
south pacific ocean
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4.4 TOURISM

TOURISM

Introduction

This section considers the potential for “out of the box” tourist attractions and short stay accommodation that generate visitation and spend from beyond the study area. The tourism industry could generate up to 800 and 900 jobs within the study area.

There is potential to support the following uses in the study area:

- 1 x Theme park
- 1 x Eco-tourism attraction (Biosphere)
- 3 x destinational food and beverage precincts
- 4 x hotel / serviced apartment facilities (1 x 100 room hotel, 1 x 100 room serviced apartment, 2 x 50 room hotel)

Theme Park

A new opportunity for the study area presents itself to fill an existing gap in theme parks across NSW.

Existing theme parks in Metropolitan Sydney include Raging Waters Sydney, Luna Park, as well as Jamberoo Action Park located in the Southern Highlands region. This provision is limited given the large population associated with Metropolitan Sydney and its outer regions.

Drivers for a theme park in the study area include:

- **Target market** – to come from Metropolitan Sydney, taking advantage of its large population base, by creating a compelling offer to generate repeat visitation
- **Daytrip visitation** – data from Tourism Research Australia indicates around 2.3 million daytrips in the SA4 associated with the study area. This is higher relative to 2019 daytrip visitation within the SA3 associated with Raging Waters (520,000 daytrips).
- **Accessibility and visibility** – proximity and visibility to major motorway i.e. Hume Motorway
- **Amenity** – provision of high quality entertainment and dining precinct, to be located within higher order in the study area.

Profiled theme parks (see overleaf) of Raging Waters Sydney and Urbnsurf Melbourne development can provide valuable lessons guiding the possible nature of theme parks in the GMGPA.

URBNSURF MELBOURNE

SUMMARY

Overview	URBNSURF Melbourne was the first man-made surf park facility in Australia and was opened to guests in 2018. The facility is located on the eastern boundary of Melbourne Airport. The man-made surf park facility is the first in Australia. The park features a pro store, surf training academy, licensed café, climbing wall, parkour trail, bouldering course, mountain bike pump track, running track making it a one-of-a-kind vibrant lifestyle sport hub. Annual visits: ~65,000 (2020)
Visitor Nights in Catchment (2019) [Tullamarine SA2]	**Overnight:** • Domestic: 48,000 • International: 61,000 **Daytrip:** 130,000
Scale	**Size:** ~50,000 sq.m **Employees:** 50 staffs
Lessons for the Study Area*	The surf park provides a distinguished offer and represents the first surf park to be opened in Australia. This is expected to attract local as well as interstate visitation. Proximity to Melbourne Airport has potential to attract in-transit passengers and tourists.

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

RAGING WATERS SYDNEY

SUMMARY

Overview	Raging Waters is the first of its kind within Sydney. The park features several water slide attractions, a large wave pool, a children's play area and a surf lifesaving club.
Visitor Nights in Catchment (2019)	**Overnight:** • Domestic: 270,000 • International: 950,000 **Daytrip:** 520,000
Scale	**Size:** 250,000 sq.m **Employees:** n/a
Success Drivers	The park is easily accessible from the M4 Motorway which provides direct access to Sydney's Inner West as well as access to the North of Sydney via the M7 Motorway and M2 Motorway. The park is currently Sydney's only waterpark and is situated in Sydney's west which is removed from beach access. The park features destination rides which attract locals and visitors alike.
Lessons for the Study Area*	The park appeals to all age groups and attracts both domestic and international visitors. A highly destinational operation could retain local entertainment spend, particularly on weekends, as well as attract significant spending from beyond Greater Macarthur.

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

TOURISM – ECO-TOURISM (BIOSPHERE)

Eco-Tourism (Biosphere)

In addition to standard employment uses, an “out of the box” land use has been considered that is not capital intensive but would be effective in placing the GMGA and Wilton Growth Area firmly on the map in a positive light; and generate visitation, spending and employment.

The out of the box land use suggested is a sustainable social enterprise found in south-east England at present, The Eden Project which has been outlined in more detail in the profile below.

The project is unique for two reasons. Firstly, it is located in a non-metropolitan area. The site is a former clay mine, and has transformed many people’s perception of Cornwall, from a former mining community to one that embraces regenerative economic, environmental and social projects.

Architecture is the second reason for its uniqueness. The main attraction of the Eden Project is its two greenhouses, which comprise eight inter-linked domes covering 23,000 sq.m. They are at the forefront of sustainable design; the Eden project is the only World Heritage Site created by a living architect. According to the UK’s Living Places, in 2007/8, the total income for the project was £22.3 million, of which 75% came from tourism, 17% from fundraising and 8% from other activities such as concerts, functions and consultancies.

Eden operates as a charity and a social enterprise that employs nearly 500 staff. Economic impact studies have shown that the project has contributed approximately £1 billion to the local economy in its first 10 years of operation. This amount excludes visitor spending at Eden itself, but includes off-site tourism related business in Cornwall and the rest of the region. It has also supported between 2,500 and 3,000 local tourist-related jobs in addition to direct jobs.

The project has transformed the region of Cornwall and provides an example of how cutting-edge design can revitalize an area.

A GMGA Biosphere of potentially half Eden’s size would provide 250 direct jobs and substantial indirect employment and patronage for other local businesses particularly in food and beverage.

EDEN BIOSPHERE

SUMMARY

Overview	The Eden Project is part of a World Heritage site in the county of Cornwall, south-east England. It is a botanical garden, employment hub, community space, education centre, entertainment venue and tourist destination all rolled into one. The complex comprises the Rainforest and Mediterranean Biomes, an interactive museum, a restaurant and surrounding outdoor gardens. The Eden Project has received planning approval to develop a 109- bedroom on-site hotel, which will provide excellent accommodation and an attractive venue for events, conferences and weddings. The hotel has currently been put on hold.
Visitation	Attracts approximately 1 million visitors per year
Scale	**Size:** ~110,000 sq.m **Employees:** 500 staffs
Lessons for the Study Area*	Taking inspiration from Eden Park and creating a 'Greater Macarthur Biosphere' albeit at a smaller scale, would result in a multi-purpose site that draws tourists, creates jobs for local people and generates value for the community through food production and education. Build something with cutting edge design. The project does not have to be big and expensive, but must be innovative and unique. Any tourist site must be connected to the local community. The Eden Project recognises that it could not sustain the large number of visitors it hosts each year without the support of the local community. It must be noted that the Eden Project has encountered a number of difficulties in recent years, with lower visitation numbers triggering financial stress. The project still relies on public funding, and must adopt long term management practices to ensure the project's sustainability going forward.

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

TOURISM – DESTINATIONAL F&B

Destinational F&B

There is potential to deliver 3 high quality indoor/outdoor licensed premises, which could support up to a total of 196 jobs. A food and beverage precinct can be integrated within each of the higher order centres in the study area (Wilton, Menangle Park and West Appin) or with the Greater Macarthur Biosphere. This could create real destinations across the study area, and generate weekend custom from beyond the local region.

A venue such as the Grounds of Alexandria in Sydney combines a high quality indoor and outdoor area, growing products on site, and incorporating bespoke coffee roasting and microbrewery facilities. It is located on a site of around 1,600 sq.m of which 40% is indoor space and 60% is landscaped outdoors providing a mix of seating, food growing areas and market stall space.

GROUNDS OF ALEXANDRIA

SUMMARY

Overview	Located in an old pie factory from the early 1900's, The Grounds of Alexandria is the flagship venue for its specialty coffee. The site hosts a coffee research and testing facility alongside a café, opening onto a luscious garden of heirloom vegetables and fragrant herbs.
Visitation	5 million Sydney residents
Scale	**Size:** ~6,000 sq.m **Employees: ~**50 staffs
Success Drivers	The Grounds offer a wholesome and rustic menu. The kitchen uses sustainable practices including picking fresh herbs every morning and working with full time horticulturalist to grow seasonal produce for the menu. The Grounds markets are held on the first weekend of each month in the café garden. They allow visitors to enjoy The Grounds brunch and own-roasted coffee whilst exploring wholesome goods sold direct from the source. The success of The Grounds is reflected in its large customer base and the waiting line to be seated in an otherwise unremarkable industrial estate in Alexandria.
Lessons for the Study Area*	An operation of this nature would tie well into the open natural park nature of the Greater Macarthur site. It would be consistent with the project objectives, particularly: • Encourage community interactions through imaginative, functional and enjoyable public spaces • Ensure long-term economic viability through design excellence • Growing a formal and informal green economy that fosters local jobs and builds regional learning around green innovation and technology. It could be a highly destinational use that would retain local food and beverage spend, particularly weekends, and could attract spending from beyond Greater Macarthur. Good management, high quality offer and service and unique architectural design are the key to this successful destination.

*Note: *Study Area includes Greater Macarthur and Wilton Growth Areas*

TOURISM – SHORT STAY ACCOMMODATION

Short Stay Accommodation

The study area could potentially support up to four short stay accommodation establishments, providing up to a total of 180 direct jobs. This could include:

- 1 x 100 room hotel – to be located within a higher order centre, primarily drawing from holiday visitors and people visiting friends and relatives
- 1 x 100 room serviced apartment – targeting workers from emerging health and industrial precincts, that are seeking long-term accommodation. This would be located within Wilton Town Centre.
- 1 x 50 room hotel – to be co-located alongside a major tourist attraction i.e. theme park/biosphere. This should be delivered subject to market demand.
- 1 x 50 room hotel – should be delivered in accordance with tourism growth in the region. Target markets would include a mix of business, holiday and visiting friends and relatives customers.

05

EMPLOYMENT OPPORTUNITIES & OUTLOOK

OPPORTUNITIES FOR EMPLOYMENT

This section provides a summary of the employment generating land uses that can potentially be supported in the study area with indicative timing and staging of uses, and indicative locations to inform traffic modelling.

Assumptions:

The following assumptions were used when assessing potential land uses in the study area:

Population Growth:

- The population on completion for the study area is forecast to contain between 159,000 to 236,000 residents under the base and high case scenarios, respectively. This equates to an annual growth rate of 7.2% - 8.0% per annum over the period of residential development (2022-2056).
- Population growth for the study area over the development period is based on the dwelling projection and an average population density.

Population Threshold Benchmarks:

- Population thresholds sourced from internal Urbis benchmarks and various Growth Centre precinct draft structure plans have been used to estimate potential employment uses and the number of facilities required to service the needs of the local population.
- In addition, population thresholds for strategic employment uses have also been sourced from similar benchmarks to estimate the number of supportable facilities and scale of these regional uses. It is noted that population thresholds should only be used as a guide when assessing regional employment uses. These uses are mainly driven by public and private sector funding, employment development strategy and competitive factors that may limit regional development.

Population Projection

Base Case	2021	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Mt Gilead	738	14,988	29,238	43,488	54,888	54,888	54,888	54,888
West Appin & North Appin	3,118	6,538	17,083	27,628	38,743	45,868	52,993	60,118
Wilton	3,969	10,897	17,826	24,754	31,683	38,611	44,154	44,154
Total	**7,825**	**32,423**	**64,147**	**95,870**	**125,314**	**139,367**	**152,035**	**159,160**
5-year average growth (%)		32.9%	14.6%	8.4%	5.5%	2.1%	1.8%	0.9%

High Case	2021	2026	2031	2036	2041	2046	2051	2056
Menangle Park & Mt Gilead	738	22,113	43,488	64,863	81,963	81,963	81,963	81,963
West Appin & North Appin	3,118	8,248	24,066	39,883	56,556	67,243	77,931	88,618
Wilton	3,969	14,583	25,197	35,810	46,424	57,038	65,529	65,529
Total	**7,825**	**44,944**	**92,750**	**140,556**	**184,943**	**206,244**	**225,423**	**236,110**
5-year average growth (%)		41.9%	15.6%	8.7%	5.6%	2.2%	1.8%	0.9%

POPULATION THRESHOLD

Population Driven Uses

	Population Threshold (residents per facility)
Retail	Derived from Urbis Greater Macarthur, Wilton and West Appin Retail Analysis
Commercial Office	0.3 sq.m per resident
Education	
Child Care	8,000
Primary School	9,000
Secondary School	24,000
Special Needs School	47,600
Community Services	
Community Centre(Local)	20,000
Community Centre (Civic / Regional)	60,000
Library	40,000
Youth Centre	20,000
Place of Worship	8,000
Emergency Services (Ambulance)	80,000
Emergency Services (Fire)	25,000
Emergency Services (Police)	50,000
Health Centres	
Medical Centre	6,000
Aged Care	
Residential Aged Care	20,000
Independent Living Units	20,000
Recreational	
Indoor Sport & Recreation Centre	50,000
Aquatic Centre	40,000
Gym	6,000
Cinema	44,000

Strategic Uses

	Population Threshold (residents per facility)
Private Hospital (50-100 beds)	38,500 – 76,900
TAFE	50,000
Destinational F&B	In line with retail centres development
Industrial	In line with residential development
Hotel	N/A
Adventure Theme Park	N/A
Biosphere	N/A

EMPLOYMENT AT CAPACITY

At capacity, the study area can provide 49,500 to 53,600 direct full-time, part-time and casual jobs. Out of the total jobs, 29,700 to 33,700 jobs will be linked to serving the needs of the localised population. The remaining 19,800 - 19,900 jobs will be driven by strategic related employment uses expected to serve the needs of the local and broader regional population.

At full development, the study area has the potential to support the following uses:

Local Population Driven Uses:

- Retail: 12 retail centres comprising around 140,000 sq.m total retail floorspace (2 sub-regional and 10 supermarket-based centres), and a bulky goods precinct.
- Commercial: Between 35,800 sq.m to 53,100 sq.m of commercial floorspace, to be located within and around the centre. This would be suitable for businesses servicing a local population base, likely in the form of smaller strata offices.
- Education: 17 to 27 childcare facilities, 18 to 26 primary schools, 7 to 10 secondary schools and 3 to 5 special needs schools.
- Community Services: 8 to 12 local community centres, 3 to 4 regional community centres, 4 to 6 libraries, 8 to 12 youth centres, 3 to 4 club/pub premises and 11 to 17 emergencies service hubs (ambulance, fire and police).
- Health Centres: 12 to 25 medical centres. A proportion of these centres would be attributed to non-retail uses within retail centres.
- Aged Care: 8 to 12 residential aged care facilities and 8 to 12 independent living unit facilities. There is potential to provide co-located residential aged care and independent living unit facilities.
- Recreational: 3 to 5 indoor sports and recreational centre, 4 to 6 aquatic centres and 14 to 20 gyms (with potential for these uses to be integrated into larger recreational centres), and 4 to 5 cinemas.

Strategic Employment Uses

- **Tertiary Education:** A district TAFE that would provide training for employment in industrial, community services, hospitality and childcare.
- **Health:** A 50 to 100 bed private hospital that would cater to strong future population growth and an ageing population.
- **Industrial Precinct(s):** An industrial precinct likely to comprise a large clustering and range of uses serving the local and wider region, delivering a scale and mix of uses similar to North Penrith Industrial Precinct.
- **Tourism:** 1 theme park, 1 eco-tourism attraction (Biosphere), 3 destinational food and beverage precincts and 4 hotel / serviced apartment facilities.

EMPLOYMENT AT CAPACITY

	Indicative Total Supportable Facilities at Capacity Base-High Case (No.)	Total Floorspace Required at Capacity (sq.m)	Employment Potential	Employment per 1,000 sq.m floorspace
Retail*	98 - 118	168,300	6,500	39
Commercial				
Offices		35,800 - 53,100	1,790 - 2,660	50
Education				
Child Care	17 - 27	11,900 - 18,900	170 - 260	14
Primary School	18 - 26	99,000 - 143,000	2,080 - 3,000	21
Secondary School	7 - 10	122,500 - 175,000	1,590 - 2,280	13
Special Needs School	3 - 5	16,500 - 27,500	200 - 330	12
Total – Education	**45 - 68**	**249,900 - 364,400**	**4,040 - 5,870**	**16**
Community Services				
Community Centre(Local)	8 - 12	3,200 - 4,800	60 - 100	19
Community Centre (Civic / Regional)	3 - 4	4,200 - 5,600	110 - 140	26
Library	4 - 6	9,600 - 14,400	120 - 170	13
Youth Centre	8 - 12	6,000 - 9,000	80 - 130	13
Place of Worship	20 - 30	10,000 - 15,000	40 - 60	4
Club	3 - 4	7,500 - 10,000	200 - 270	27
Emergency Services (Ambulance)	2 - 3	10,000 - 15,000	60 - 90	6
Emergency Services (Fire)	6 - 9	30,000 - 45,000	150 - 230	5
Emergency Services (Police)	3 - 5	15,000 - 25,000	570 - 950	38
Total – Community Services	57 - 85	95,500 - 143,800	1,390 - 2,140	15
Health Centres				
Medical Centre	12 - 25	6,000 - 12,500	90 - 190	15
Aged Care				
Residential Aged Care	8 - 12	4,000 - 6,000	110 - 170	28
Independent Living Units	8 - 12	4,000 - 6,000	40 - 70	10
Total – Aged Care	16 - 24	8,000 - 12,000	150 - 240	19
Recreational				
Indoor Sport & Recreation Centre	3 - 5	7,500 - 12,500	110 - 190	15
Aquatic Centre	4 - 6	10,000 - 15,000	100 - 150	10
Gym	14 - 20	6,800 - 9,800	180 - 250	27
Cinema	4 - 5	16,000 - 20,000	160 - 200	10
Total – Recreational	25 - 36	40,300 - 57,300	340 - 450	8

EMPLOYMENT AT CAPACITY

	Indicative Total Supportable Facilities at Capacity Base-High Case (No.)	Total Floorspace Required at Capacity (sq.m)	Employment Potential	Employment per 1,000 sq.m floorspace
Strategic				
TAFE	1	5,000	200-250	40-50
Private Hospital (50-100 beds)	1	7,500-15,000	200-300	40-60
Hotel (100 rooms)	1	6,800	61	9
Serviced Apartment (100 rooms)	1	6,800	61	9
Hotel (50 rooms)	2	6,800	61	9
Destinational F&B	3	4,500	196	43

	Total Gross Area (ha)	Total Floorspace Required at Capacity (sq.m)	Employment Potential	Employment per 1,000 sq.m floorspace
Strategic Uses				
Industrial Park	~600	2,300,000	18,500*	8
Adventure Theme Park	200	n/a	250	n/a
Biosphere	55	n/a	250	n/a

INDICATIVE LOCATION OF EMPLOYMENT USES

This section considers the spatial requirements of the recommended employment uses. These requirements will be identified through an assessment of their locational requirements, and their indicative location within the study area (Greater Macarthur and Wilton Growth Areas).

Town Centre

A number of uses that have been identified have the potential to be located adjacent to retail facilities within centres. This include:

- Gym
- Child care centre
- Medical centre
- Community centre/library
- Commercial suites.

Landholders in the Wilton precinct have already indicated proposed schools, medical centres and childcare to be located adjacent to centres in the proposed centres network within their preliminary structure plans.

Land Fill and Other Locations

Other uses to be considered amongst the proposed spatial requirements in the study area and adjacent lands include:

- Community, education, health and recreational facilities to be located throughout residential areas within the study area
- Industrial and employment land to be located at Maldon and Moreton Park Road, with potential for some uses to be located within land south of Wilton Town Centre
- The Biosphere and adventure theme park, while a destination for tourists, does not require a central location, and can be located away from the centre. They do however require large sites, with signage directing visitors.
- Food and beverage precincts with a similar offer to the Grounds of Alexandria in Sydney to be co-located with retail facilities.

The following table assesses the locational drivers of employment for each of the recommended land use in the study area, each having different locational/spatial requirements.

Locational Drivers of Employment

Locational Drivers	**Local Population Driven Uses**	**Specialised Health and Education**	**Industrial**	**Tourism**
Accessible to local population	✔	✔		
Access to main road	✔	✔	✔	
Large site area		✔	✔	✔
Buffer Area		✔	✔	
Parking	✔	✔	✔	✔
Exposure to main road	✔	✔	✔	
Public transport access	✔	✔		✔
Signage	✔	✔	✔	✔
Outcome	Co-locate within proposed centres and within residential areas	Adjacent to higher order town centre i.e. Wilton TC	Within Maldon (as identified in the Wilton 2040 Plan) and Moreton Park Road	Location to be determined

STAGING AND TIMING OF DEVELOPMENT

The staging and delivery of new facilities and associated employment will be tied to the timing of dwelling completions and population growth within the development precincts in the study area.

Timing is based on dwelling completion estimates provided by NSW DPE. Urbis benchmarking identifies population thresholds to support land uses associated with employment shown earlier in this report.

In practice, there may be instances where facilities have been built early in the development phase, to provide community amenity for early residents. This follows the growth paradigm strategy of creating communities, which in turn stimulates residential development.

It is noted that these facilities may not be fully utilised in the early stages, and this may translate to lower employment as services reach full capacity.

The following pages provide an indicative delivery program for new land uses within the study area.

The tables show indicative timing of jobs associated with the delivery of each land use and provide a delivery timeline of associated floorspace required for each of the land uses (under the base and high case population scenario).

Indicative staging may be summarised as follows:

- The majority of development in education, community services and health will occur between 2022 to 2041, in line with the build out of Menangle Park and Wilton. Additional facilities will be added along with the take-up of West Appin.
- Tourism attractions such as the adventure theme park and biosphere have been pushed forward in the delivery timeline under the “build it and they will come” strategy. This is expected to create new opportunities for the study area to generate visitation and spend from beyond.
- Potential to create substantial indirect employment and patronage for other local businesses particularly in food and beverage.
- A similar strategy should be adopted in introducing a TAFE and private hospital, linking community with knowledge-based precincts
- Industrial development will be long term, under a straight-line take-up throughout the future period. It is noted that development may not necessarily follow this timeline, with development ultimately guided by investment and planning strategy.

INDICATIVE STAGING BY JOBS – BASE CASE SCENARIO

	2026	2031	2036	2041	2046	2051	2056	Total
Retail*								
Commercial								
Offices	485	475	475	355	0	0	0	1,790
Education								
Child Care	40	40	40	40	10	0	0	170
Primary School	462	462	462	347	231	116	0	2,080
Secondary School	227	227	227	227	227	227	227	1,590
Special Needs School	0	67	67	67	0	0	0	200
Total Education	**729**	**796**	**796**	**680**	**468**	**343**	**227**	**4,040**
Community Services								
Community Centre(Local)	15	15	15	8	8	0	0	60
Community Centre (Civic / Regional)	0	37	37	0	0	37	0	110
Library	0	30	30	30	0	30	0	120
Youth Centre	20	20	20	10	10	0	0	80
Place of Worship	8	8	8	8	4	4	0	40
Club	0	133	0	67	0	0	0	200
Emergency Services (Ambulance)	0	0	0	60	0	0	0	60
Emergency Services (Fire)	25	25	25	25	50	0	0	150
Emergency Services (Police)	0	190	190	190	0	0	0	570
Total Community Services	**68**	**458**	**325**	**397**	**72**	**71**	**0**	**1,390**
Health Centres								
Medical Centre	38	38	15	0	0	0	0	90
Aged Care								
Residential Aged Care	28	28	28	14	14	0	0	110
Independent Living Units	10	10	10	5	5	0	0	40
Total Aged Care	**38**	**38**	**38**	**19**	**19**	**0**	**0**	**150**

INDICATIVE STAGING BY JOBS – BASE CASE SCENARIO CONT.

	2026	2031	2036	2041	2046	2051	2056	Total
Recreational								
Indoor Sport & Recreation Centre	0	37	37	37	0	0	0	110
Aquatic Centre	0	25	25	25	0	25	0	100
Gym	66	66	48	0	0	0	0	180
Cinema	0	40	40	40	0	0	40	160
Total Recreational	**66**	**168**	**149**	**102**	**0**	**25**	**40**	**550**
Other - Population Driven								
Home Workers	2,180	2,133	2,133	1,979	945	852	479	10,700
Construction	509	498	498	462	221	199	112	2,500
Public Administration	81	80	80	74	35	32	18	400
Utilities (Electricity, Water, Gas, Internet)	81	80	80	74	35	32	18	400
Property Maintenance Services	122	120	120	111	53	48	27	600
Waste Collection Services	20	20	20	18	9	8	4	100
Correctional Services	41	40	40	37	18	16	9	200
Security/Investigation Services	61	60	60	55	26	24	13	300
Total Other Population Driven	**3,096**	**3,030**	**3,030**	**2,812**	**1,342**	**1,210**	**680**	**15,200**
Strategic Uses								
TAFE	0	200	0	0	0	0	0	200
Private Hospital (50-100 beds)	0	200	0	0	0	0	0	200
Hotel (100 rooms)	0	61	0	0	0	0	0	61
Serviced Apartment (100 rooms)	0	61	0	0	0	0	0	61
Hotel (50 rooms)	0	15	0	15	0	0	0	31
Destinational F&B	0	130	0	65	0	0	0	196
Industrial Park (ha)	2,000	4,130	4,130	3,833	1,830	1,649	928	18,500
Adventure Theme Park	0	250	0	0	0	0	0	250
Biosphere	0	250	0	0	0	0	0	250
Total - Strategic Uses	**1,500**	**2,334**	**1,167**	**1,247**	**1,167**	**1,167**	**1,167**	**9,748**

INDICATIVE STAGING BY JOBS – HIGH CASE SCENARIO

	2026	2031	2036	2041	2046	2051	2056	Total
Retail*								
Commercial								
Offices	676	716	716	551	0	0	0	**2,660**
Education								
Child Care	58	58	58	58	29	0	0	260
Primary School	577	577	577	577	231	231	231	3,000
Secondary School	456	456	456	456	228	228	0	2,280
Special Needs School	0	66	66	66	0	132	0	330
Total Education	**1,091**	**1,157**	**1,157**	**1,157**	**488**	**591**	**231**	**5,870**
Community Services								
Community Centre(Local)	17	17	17	17	8	8	17	100
Community Centre (Civic / Regional)	0	35	35	35	0	35	0	140
Library	28	28	28	28	28	28	0	170
Youth Centre	22	22	22	22	11	11	22	130
Place of Worship	12	12	12	12	6	4	2	60
Club	0	0	135	0	68	0	68	270
Emergency Services (Ambulance)	0	30	30	30	0	0	0	90
Emergency Services (Fire)	51	51	51	51	26	0	0	230
Emergency Services (Police)	0	190	190	190	0	380	0	950
Total Community Services	**130**	**385**	**520**	**385**	**147**	**467**	**108**	**2,140**
Health Centres								
Medical Centre	83	94	94	24	0	0	0	295
Aged Care								
Residential Aged Care	28	28	28	28	14	14	28	170
Independent Living Units	12	12	12	12	6	6	12	70
Total Aged Care	**40**	**40**	**40**	**40**	**20**	**20**	**40**	**240**

INDICATIVE STAGING BY JOBS – HIGH CASE SCENARIO CONT.

	2026	2031	2036	2041	2046	2051	2056	Total
Recreational								
Indoor Sport & Recreation Centre	0	38	38	38	0	76	0	190
Aquatic Centre	25	25	25	25	25	25	0	150
Gym	90	103	58	0	0	0	0	250
Cinema	40	40	40	40	40	0	0	200
Total Recreational	**155**	**206**	**161**	**103**	**65**	**101**	**0**	**790**
Other - Population Driven								
Home Workers	2,037	2,166	2,166	2,011	965	869	484	10,700
Construction	476	506	506	470	226	203	113	2,500
Public Administration	76	81	81	75	36	32	18	400
Utilities (Electricity, Water, Gas, Internet)	76	81	81	75	36	32	18	400
Property Maintenance Services	114	121	121	113	54	49	27	600
Waste Collection Services	19	20	20	19	9	8	5	100
Correctional Services	38	40	40	38	18	16	9	200
Security/Investigation Services	57	61	61	56	27	24	14	300
Total Other Population Driven	**2,893**	**3,078**	**3,078**	**2,857**	**1,371**	**1,235**	**688**	**15,200**
Strategic Uses								
TAFE	0	250	0	0	0	0	0	250
Private Hospital (50-100 beds)	0	300	0	0	0	0	0	300
Hotel (100 rooms)	0	61	0	0	0	0	0	61
Serviced Apartment (100 rooms)	0	61	0	0	0	0	0	61
Hotel (50 rooms)	0	15	0	15	0	0	0	31
Destinational F&B	0	130	0	65	0	0	0	196
Industrial Park (ha)	2,000	4,126	4,126	3,831	1,839	1,655	922	18,500
Adventure Theme Park	0	250	0	0	0	0	0	250
Biosphere	0	250	0	0	0	0	0	250
Total - Strategic Uses	**1,500**	**2,484**	**1,167**	**1,247**	**1,167**	**1,167**	**1,167**	**9,898**

INDICATIVE STAGING BY GROSS FLOOR AREA (SQ.M) – BASE CASE SCENARIO

	2026	2031	2036	2041	2046	2051	2056	Total
Retail*								
Commercial								
Offices	9,700	9,500	9,500	7,100	0	0	0	**35,800**
Education								
Child Care	2,800	2,800	2,800	2,800	700	0	0	11,900
Primary School	22,000	22,000	22,000	16,500	11,000	5,500	0	99,000
Secondary School	17,500	17,500	17,500	17,500	17,500	17,500	17,500	122,500
Special Needs School	0	5,500	5,500	5,500	0	0	0	16,500
Total Education	**42,300**	**47,800**	**47,800**	**42,300**	**29,200**	**23,000**	**17,500**	249,900
Community Services								
Community Centre(Local)	800	800	800	400	400	0	0	3,200
Community Centre (Civic / Regional)	0	1,400	1,400	0	0	1,400	0	4,200
Library	0	2,400	2,400	2,400	0	2,400	0	9,600
Youth Centre	1,500	1,500	1,500	750	750	0	0	6,000
Place of Worship	2,000	2,000	2,000	2,000	1,000	1,000	0	10,000
Club	0	5,000	0	2,500	0	0	0	7,500
Emergency Services (Ambulance)	0	0	0	10,000	0	0	0	10,000
Emergency Services (Fire)	5,000	5,000	5,000	5,000	10,000	0	0	30,000
Emergency Services (Police)	0	5,000	5,000	5,000	0	0	0	15,000
Total Community Services	**9,300**	**23,100**	**18,100**	**28,050**	**12,150**	**4,800**	**0**	**95,500**
Health Centres								
Medical Centre	2,500	2,500	1,000	0	0	0	0	6,000
Aged Care								
Residential Aged Care	1,000	1,000	1,000	500	500	0	0	4,000
Independent Living Units	1,000	1,000	1,000	500	500	0	0	4,000
Total Aged Care	**2,000**	**2,000**	**2,000**	**1,000**	**1,000**	**0**	**0**	**8,000**

INDICATIVE STAGING BY GROSS FLOOR AREA (SQ.M) – BASE CASE SCENARIO CONT.

	2026	2031	2036	2041	2046	2051	2056	Total
Recreational								
Indoor Sport & Recreation Centre	0	2,500	2,500	2,500	0	0	0	7,500
Aquatic Centre	0	2,500	2,500	2,500	0	2,500	0	10,000
Gym	2,500	2,500	1,800	0	0	0	0	6,800
Cinema	0	4,000	4,000	4,000	0	0	4,000	16,000
Total Recreational	**2,500**	**11,500**	**10,800**	**9,000**	**0**	**2,500**	**4,000**	**40,300**
Strategic Uses								
TAFE	0	5,000	0	0	0	0	0	5,000
Private Hospital (50-100 beds)	0	7,500	0	0	0	0	0	7,500
Hotel (100 rooms)	0	6,800	0	0	0	0	0	6,800
Serviced Apartment (100 rooms)	0	6,800	0	0	0	0	0	6,800
Hotel (50 rooms)	0	3,400	0	3,400	0	0	0	6,800
Destinational F&B	0	3,000	0	1,500	0	0	0	4,500
Industrial Park (ha)	66	134	134	124	59	53	30	600
Adventure Theme Park	0	200	0	0	0	0	0	200
Biosphere	0	55	0	0	0	0	0	55
Total - Strategic Uses	**0**	**32,798**	**43**	**4,943**	**43**	**43**	**43**	**37,915**

INDICATIVE STAGING BY GROSS FLOOR AREA (SQ.M) – HIGH CASE SCENARIO

	2026	2031	2036	2041	2046	2051	2056	Total
Retail*								
Commercial								
Offices	13,500	14,300	14,300	11,000	0	0	0	**53,100**
Education								
Child Care	4,200	4,200	4,200	4,200	2,100	0	0	18,900
Primary School	27,500	27,500	27,500	27,500	11,000	11,000	11,000	143,000
Secondary School	35,000	35,000	35,000	35,000	17,500	17,500	0	175,000
Special Needs School	0	5,500	5,500	5,500	0	11,000	0	27,500
Total Education	**66,700**	**72,200**	**72,200**	**72,200**	**30,600**	**39,500**	**11,000**	**364,400**
Community Services								
Community Centre(Local)	800	800	800	800	400	400	800	4,800
Community Centre (Civic / Regional)	0	1,400	1,400	1,400	0	1,400	0	5,600
Library	2,400	2,400	2,400	2,400	2,400	2,400	0	14,400
Youth Centre	1,500	1,500	1,500	1,500	750	750	1,500	9,000
Place of Worship	3,000	3,000	3,000	3,000	1,500	1,000	500	15,000
Club	0	0	5,000	0	2,500	0	2,500	10,000
Emergency Services (Ambulance)	0	5,000	5,000	5,000	0	0	0	15,000
Emergency Services (Fire)	10,000	10,000	10,000	10,000	5,000	0	0	45,000
Emergency Services (Police)	0	5,000	5,000	5,000	0	10,000	0	25,000
Total Community Services	**17,700**	**29,100**	**34,100**	**29,100**	**12,550**	**15,950**	**5,300**	**143,800**
Health Centres								
Medical Centre	3,500	4,000	4,000	1,000	0	0	0	12,500
Aged Care								
Residential Aged Care	1,000	1,000	1,000	1,000	500	500	1,000	6,000
Independent Living Units	1,000	1,000	1,000	1,000	500	500	1,000	6,000
Total Aged Care	**2,000**	**2,000**	**2,000**	**2,000**	**1,000**	**1,000**	**2,000**	**12,000**

INDICATIVE STAGING BY GROSS FLOOR AREA (SQ.M) – HIGH CASE SCENARIO CONT.

	2026	2031	2036	2041	2046	2051	2056	Total
Recreational								
Indoor Sport & Recreation Centre	0	2,500	2,500	2,500	0	5,000	0	12,500
Aquatic Centre	2,500	2,500	2,500	2,500	2,500	2,500	0	15,000
Gym	3,500	4,000	2,250	0	0	0	0	9,750
Cinema	4,000	4,000	4,000	4,000	4,000	0	0	20,000
Total Recreational	**10,000**	**13,000**	**11,250**	**9,000**	**6,500**	**7,500**	**0**	**57,250**
Strategic Uses								
TAFE	0	5,000	0	0	0	0	0	5,000
Private Hospital (50-100 beds)	0	15,000	0	0	0	0	0	15,000
Hotel (100 rooms)	0	6,800	0	0	0	0	0	6,800
Serviced Apartment (100 rooms)	0	6,800	0	0	0	0	0	6,800
Hotel (50 rooms)	0	3,400	0	3,400	0	0	0	6,800
Destinational F&B	0	3,000	0	1,500	0	0	0	4,500
Industrial Park (ha)	66	134	134	124	60	54	30	600
Adventure Theme Park	0	200	0	0	0	0	0	200
Biosphere	0	55	0	0	0	0	0	55
Total - Strategic Uses	**0**	**40,298**	**43**	**4,943**	**43**	**43**	**43**	**45,415**

RISKS

The Greater Macarthur and Wilton Growth Areas are not immune to the risks associated with large scale greenfield development. The intention to create new residential communities within development precincts will present unique challenges let alone the challenge of integrating the two growth areas into the wider Metropolitan Sydney context.

The table below outlines some of the potential risks that may impact on strong community development within Greater Macarthur and Wilton Growth Areas.

RISK	RISK TYPE	DESCRIPTION
Pattern of Development	Development Risk	The growth fronts of residential development are expected to commence within the Menangle Park and Mount Gilead and Wilton precincts. However, these precincts are large and are quite separated from each other. It could prove difficult to leapfrog the urban gap between these two precincts, with no current planning proposals in place to integrate Douglas Park into the growth areas.
Stakeholder Interest	Strategic Risk	Residential development is heavily reliant on the interests of landowners and developers. As such, the Wilton precinct has already received strong commitment from developers such as Bradcorp and Walker Corporation, with Lend Lease already established with their Bingara Gorge community development and Mirvac with its development at Station Street Menangle, and broader landholding within Moreton Park Road. Future commitment from landholders across the GMGA will ultimately guide public sector funding for critical infrastructure required for public transport, roads, and employment centres.
Growth of Western Sydney	Competitive Risk	Competition from the Western Sydney Aerotropolis could impact on the development of the Greater Macarthur and Wilton Growth Areas. This is noting the State Government’s commitment to delivering a second Sydney airport at Badgerys’s Creek, and new dwelling capacity to meet the housing supply needs across Metropolitan Sydney. This could potentially compete with housing in the growth areas, noting the housing supply risk associated with large scale land release. The growth of the Western Sydney Employment Area (WSEA) could have significant implications for future industrial land at the growth areas. This is noting the proximity of WSEA to strategic infrastructure (Sydney Airport, Port Botany, and proposed Intermodal Terminal at Moorebank), and a significantly higher quantum of undeveloped land that is expected to compete with future industrial land at the growth areas.
Technology Impacts on Labour	Technological Risk	The progressive digitisation of our national economy continues to disrupt traditional and main industry sectors of employment. The effects of new digital technology within industries have been examined through how industries deliver products and services, and management of business and supply chain processes. A key example of digital disruption is online retailer Amazon’s entry into the Australian market, who are understood to be looking for warehousing distribution sites in WSEA as well as Goodman Group’s $50 million industrial estate at Oakdale (33 km west of Wilton). This potentially impacts the way traditional logistics and warehousing sectors continue to operate into the future, and could pose further implications for industrial land required for these uses. The type of industrial land use will potentially have to shift from traditional warehouses to higher built form warehouses to meet the needs of the growing digital technology.

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