

Future cities: A snapshot of Campbelltown

COMMUNITY



ECONOMY



LIVEABILITY



WELLBEING



Committee
for
Sydney



SGS Economics and Planning acknowledges the First Nations Peoples of Australia on whose Country we live and work, particularly the Dharawal people on whose land we meet today.

We acknowledge that the Aboriginal and Torres Strait Islander peoples of Australia are one of the oldest continuing living cultures on Earth, have one of the oldest continuing land tenure systems in the world, and have one of the oldest continuing land use planning and management systems in the world. We pay our respects to the First Nations Peoples, past and present, and acknowledge their stewardship of Country over thousands of years.



Independent
insight.



Campbelltown: State of play

In **2021**, Campbelltown LGA was home to

176,500 residents

52,500 jobs



By **2051**, Campbelltown LGA is projected to have

256,000 residents

86,000 jobs



01

Community

Migration

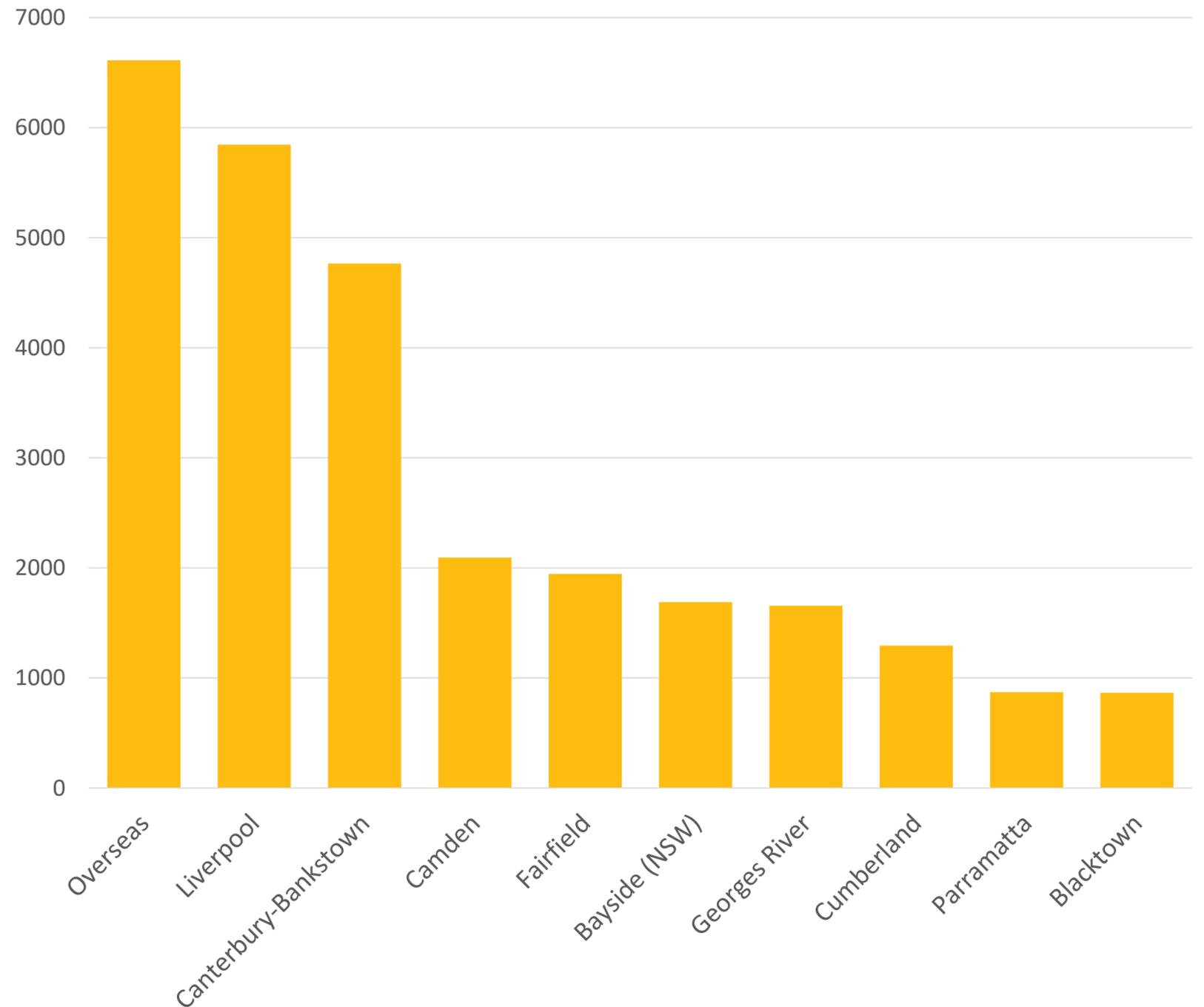
20%

Of Campbelltown's residents moved to the LGA in the past five years. Of these, **18%** were from overseas. This compares with 72%* of new residents in Greater Sydney coming from overseas over the same period.

29%

Nearly a third of new residents moved from two LGAs – Liverpool and Canterbury-Bankstown.

INWARD MIGRATION TO CAMPBELLTOWN LGA (PLACE OF RESIDENCE FIVE YEARS AGO)



*New residents does not include internal migration between Greater Sydney LGAs.

Cultural diversity

2 in every 5 residents

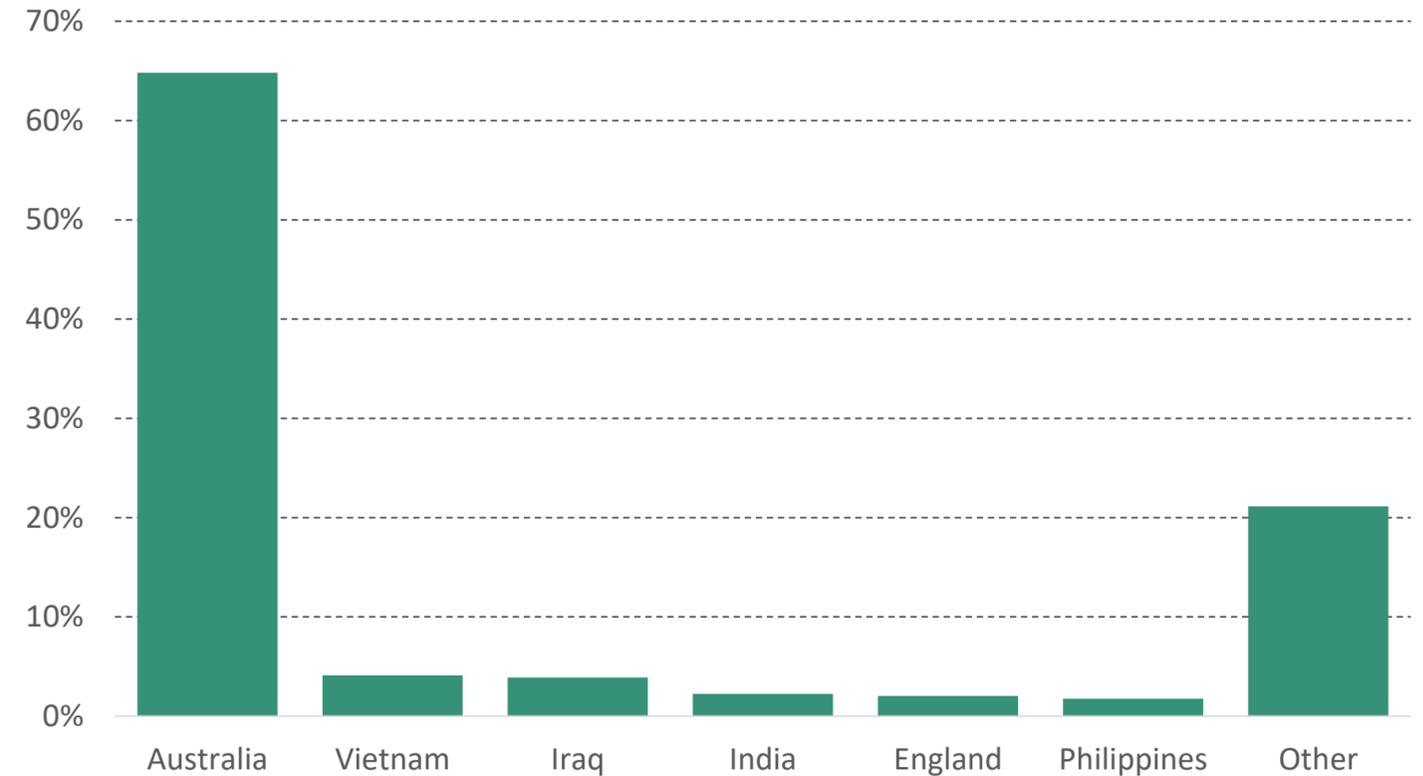
in the Campbelltown LGA and City Centre were born overseas.

...it is 1 in every 3

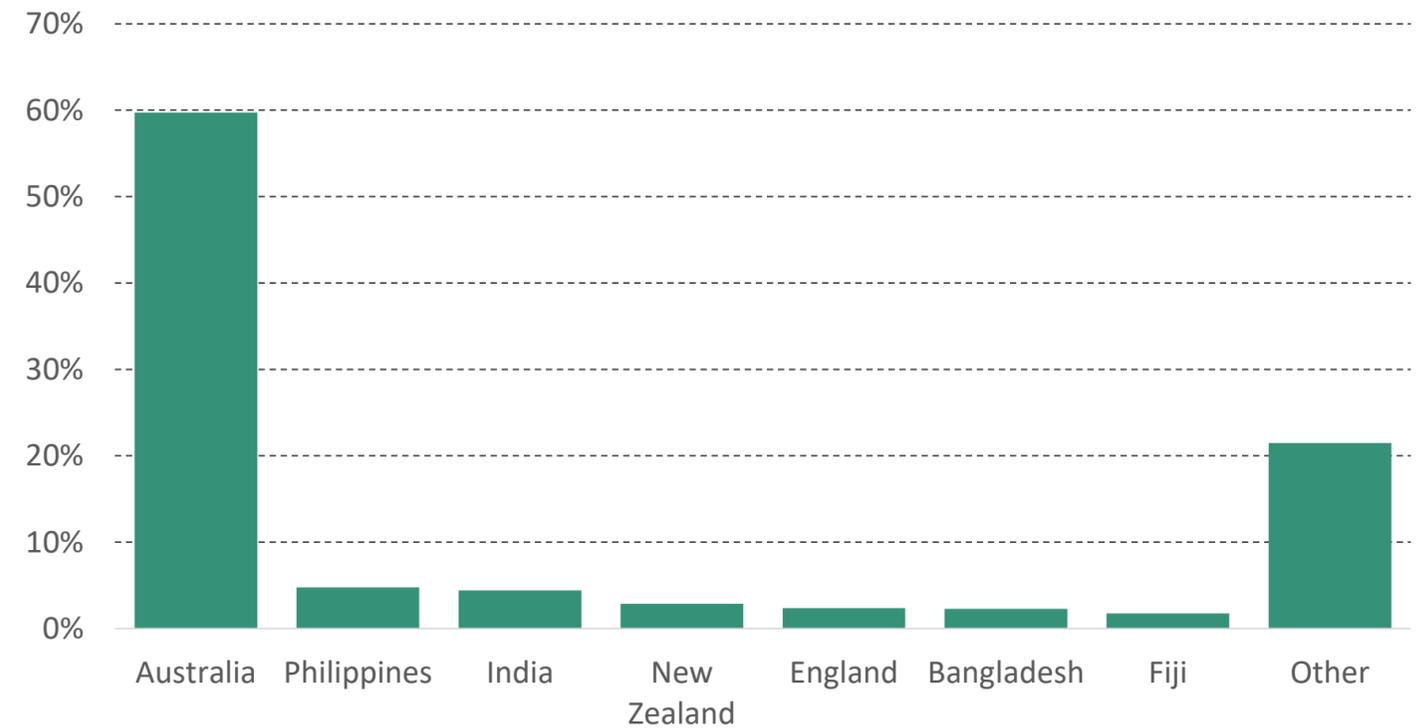
more broadly in Western Sydney.

The composition of this culturally diverse community differs though across Campbelltown's suburbs and city centre.

COUNTRY OF BIRTH - WESTERN SYDNEY RESIDENTS



COUNTRY OF BIRTH - CAMPBELLTOWN CITY CENTRE RESIDENTS



Source: ABS Census, 2021

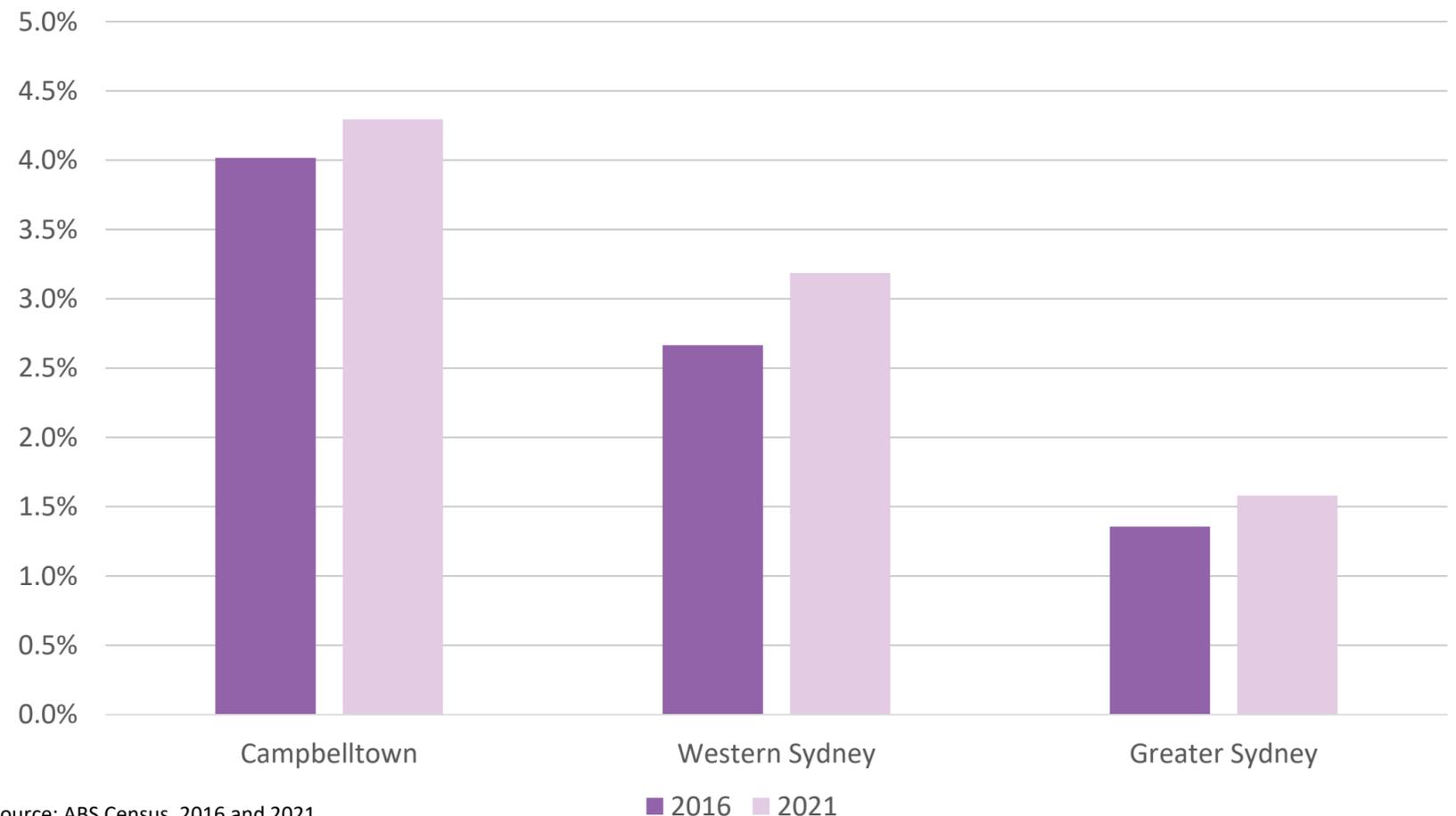
A growing First Nations community

Campbelltown and Western Sydney have both seen a growth in the number of Aboriginal and Torres Strait Islander residents over the past five years.

4.3%

The Aboriginal and Torres Strait Islander population in Campbelltown compared to 1.6% in Greater Sydney.

ABORIGINAL AND TORRES STRAIT ISLANDER PERCENTAGE OF POPULATION: 2016-2021



Source: ABS Census, 2016 and 2021

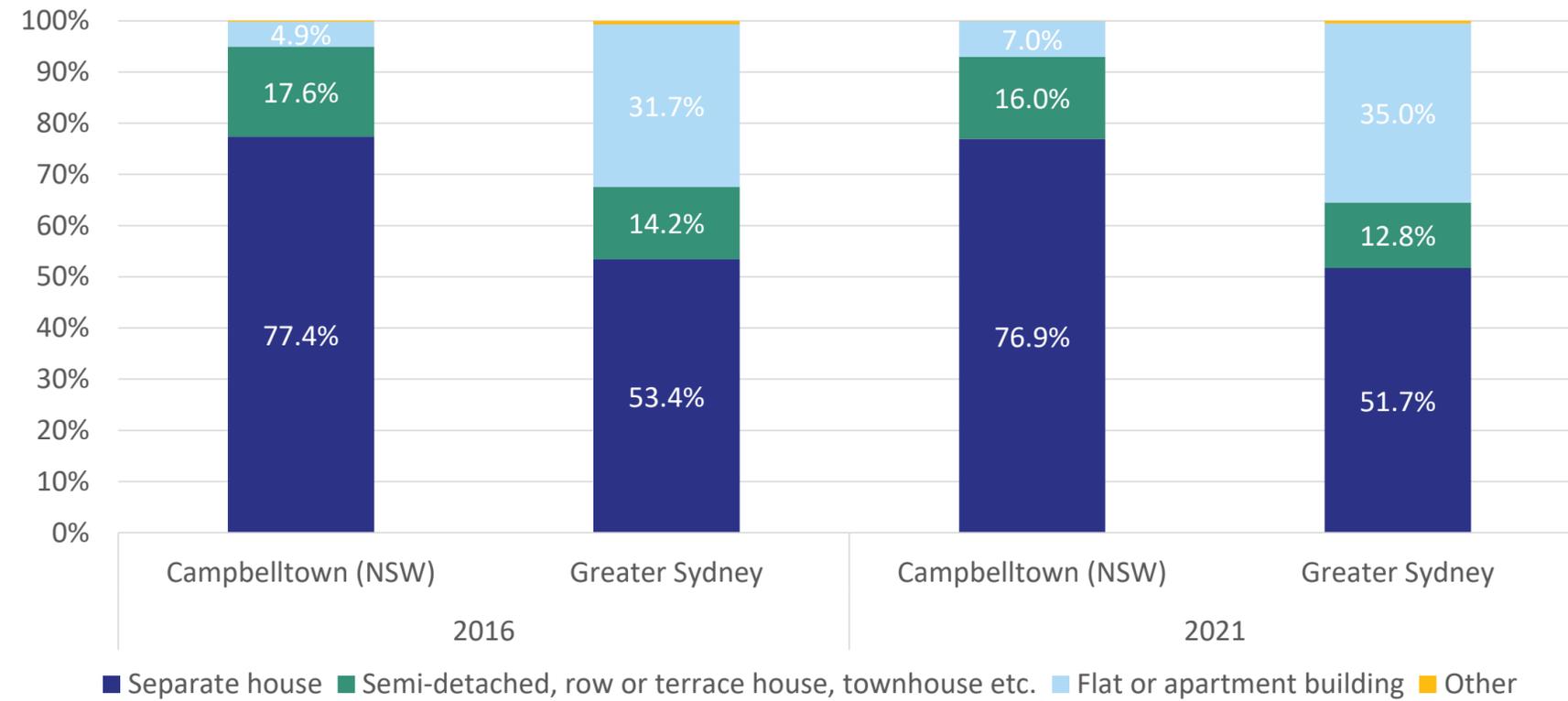
Housing choice

77%

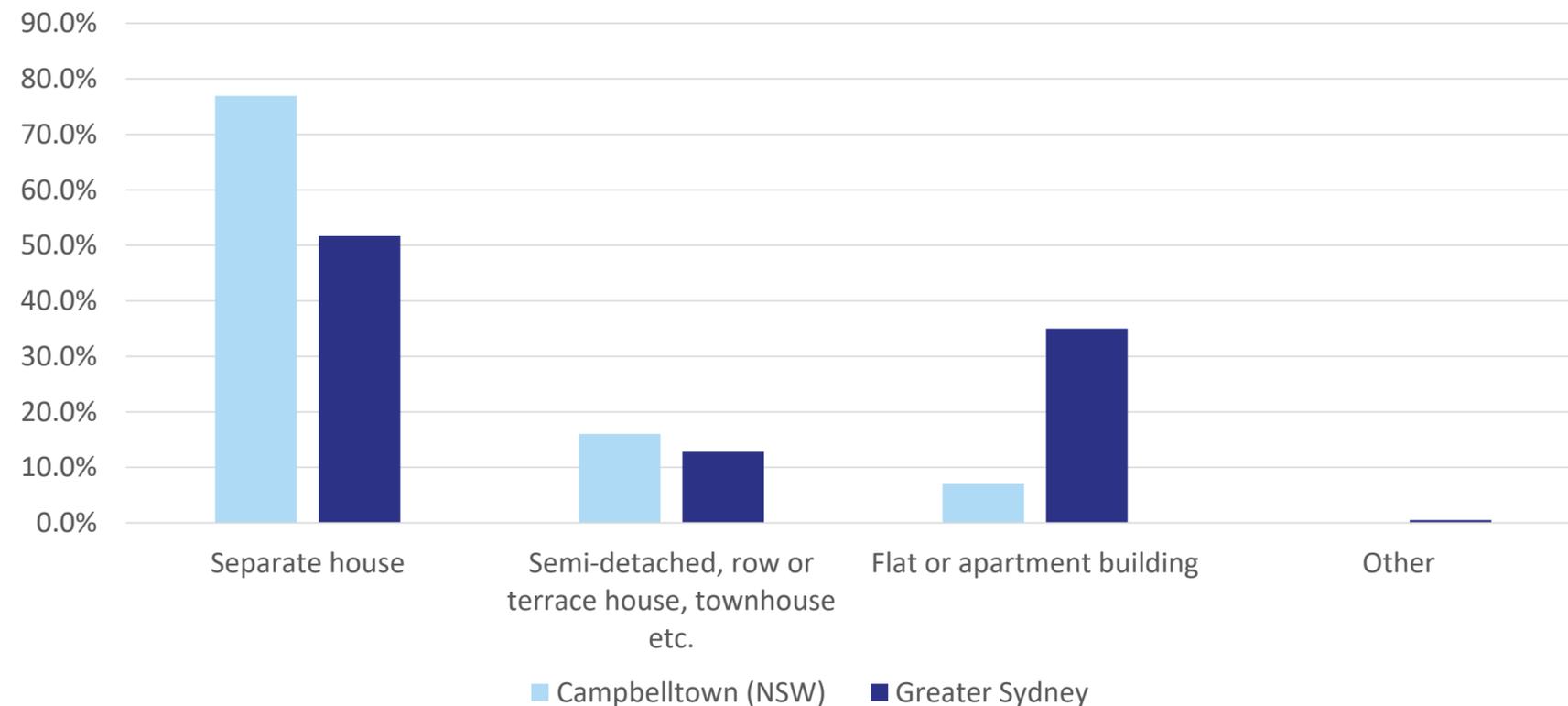
Over three-quarters of houses in Campbelltown are detached, compared with 52% in Greater Sydney.

And the LGA has lower density levels, with apartments making up only 7% of homes.

DWELLING STRUCTURE CAMPBELLTOWN LGA AND GREATER SYDNEY – 2016 AND 2021



DWELLING STRUCTURE CAMPBELLTOWN LGA AND GREATER SYDNEY - 2021



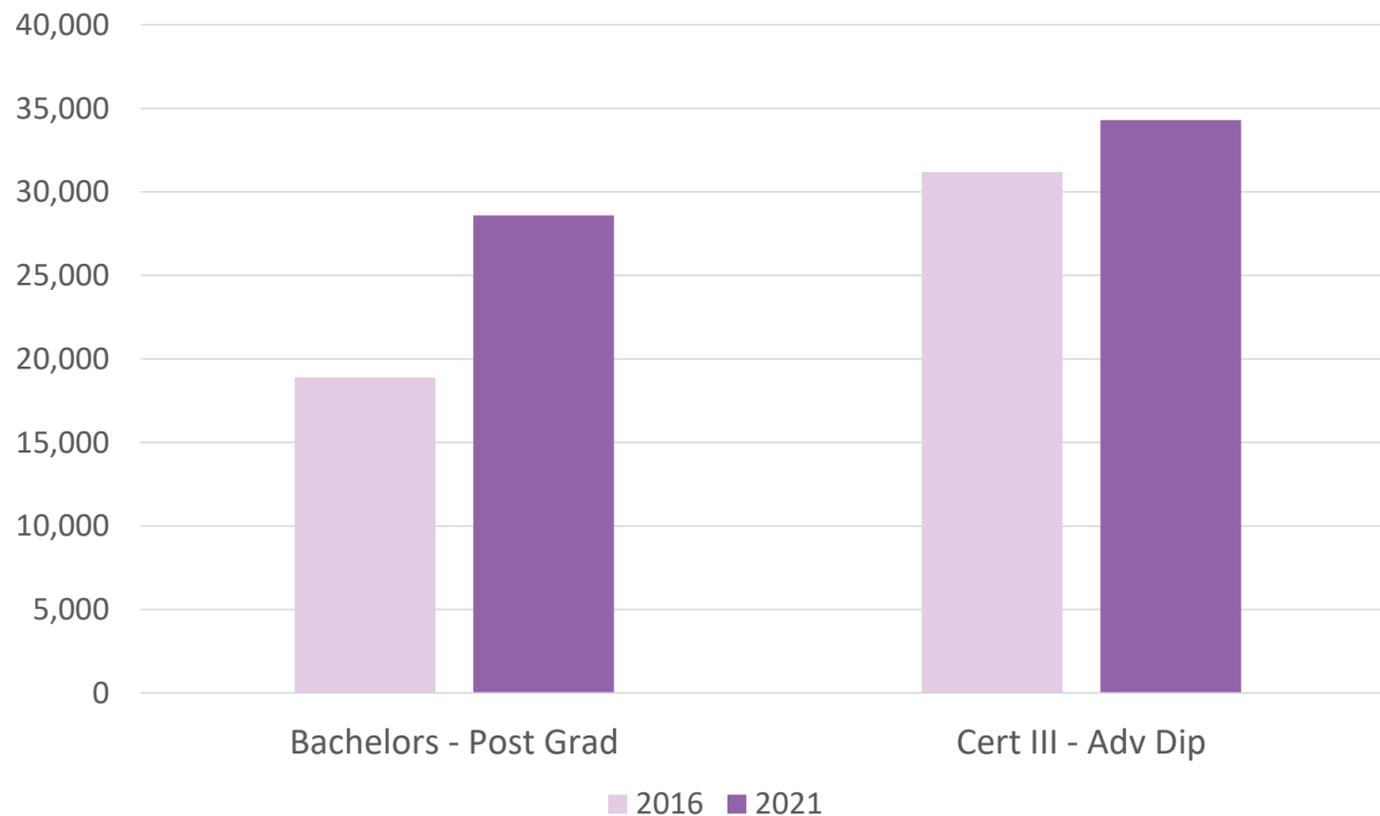
Education

Females in the Campbelltown LGA represent 55% of the residents with Bachelor Degrees and higher, while males make up 55% of residents with Certificate IIIs to Advanced Diplomas.

51%

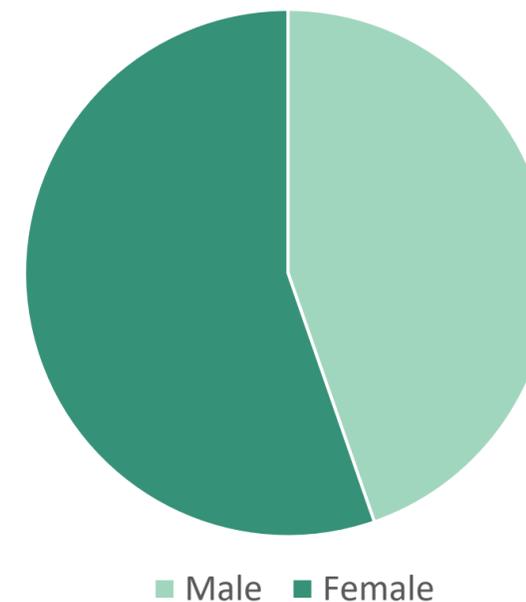
The percentage change of residents with Bachelor Degrees and higher increased by 51% between 2016 and 2021.

CHANGE IN HIGHER EDUCATIONAL ATTAINMENT – 2016-2021

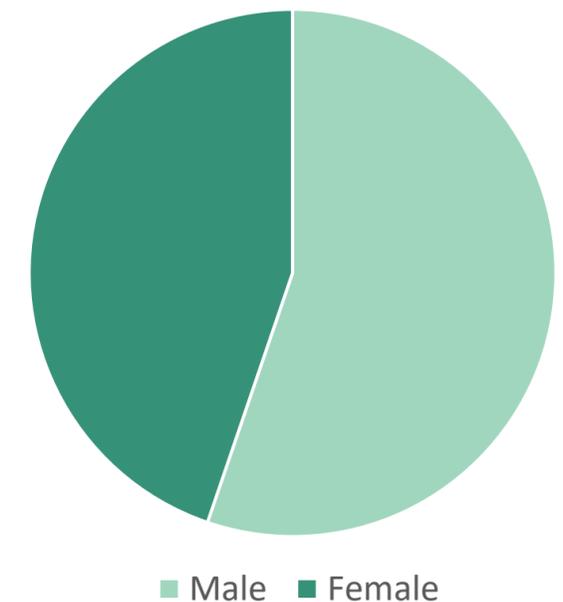


SPLIT OF RESIDENTS WITH HIGHER EDUCATIONAL ATTAINMENT BY GENDER, 2021

Bachelors - Post Graduate



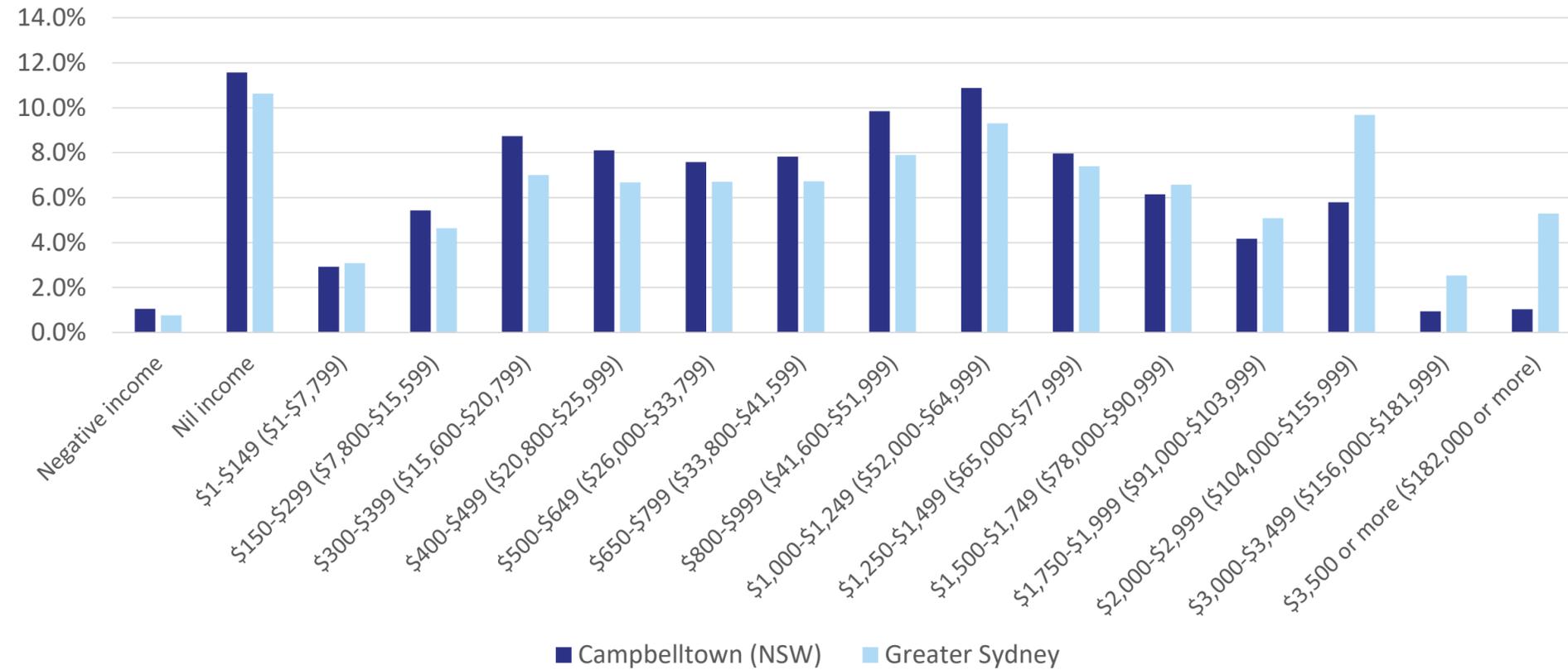
Cert III - Advanced Diploma



Personal weekly income

The weekly income of residents in Campbelltown LGA is generally lower than Greater Sydney, but there has been an increase in top deciles over the past five years.

PERSONAL WEEKLY INCOME – CAMPBELLTOWN LGA AND GREATER SYDNEY 2021



CHANGE IN PERSONAL WEEKLY INCOME CAMPBELLTOWN LGA – 2016-2021



62%

Of Women earn less than \$799 a week.

44%

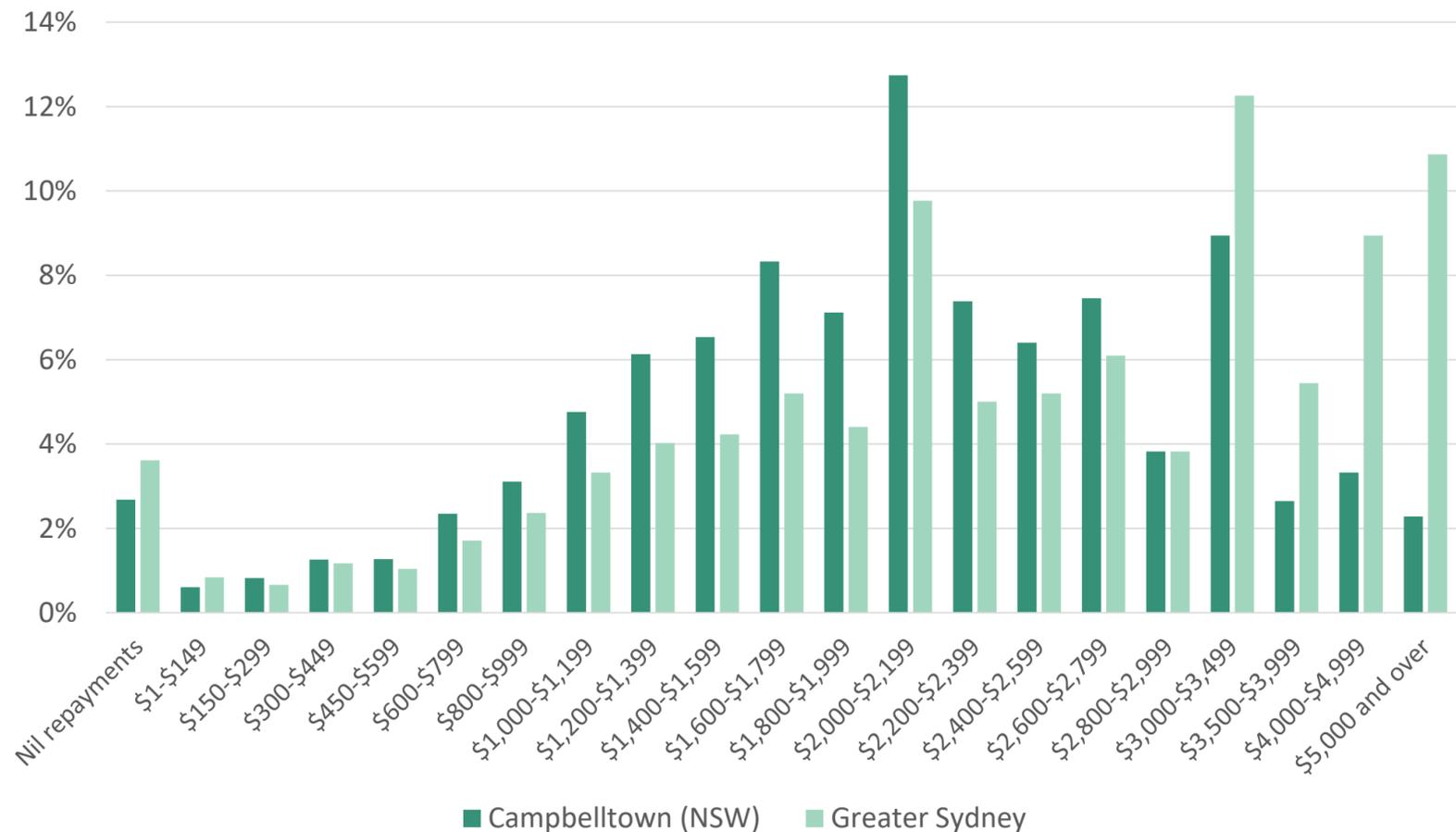
Of Men earn less than \$799 a week.

Households

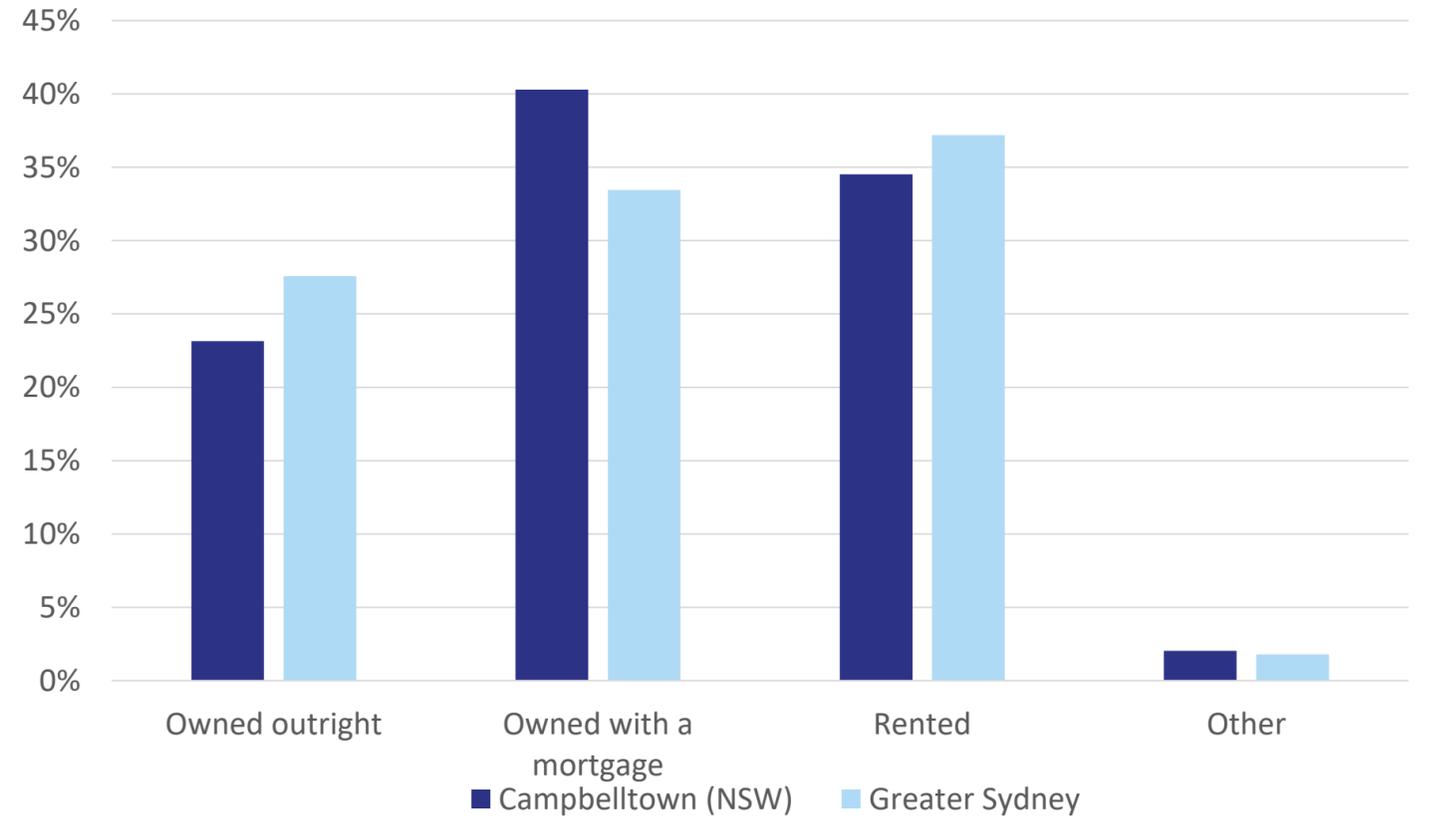
40%

Campbelltown has a higher proportion of dwellings owned with a mortgage at 40%, compared to 33% across Greater Sydney. It also has typically lower monthly mortgage repayments than Greater Sydney.

MONTHLY MORTGAGE REPAYMENTS CAMPBELLTOWN LGA AND GREATER SYDNEY - 2021

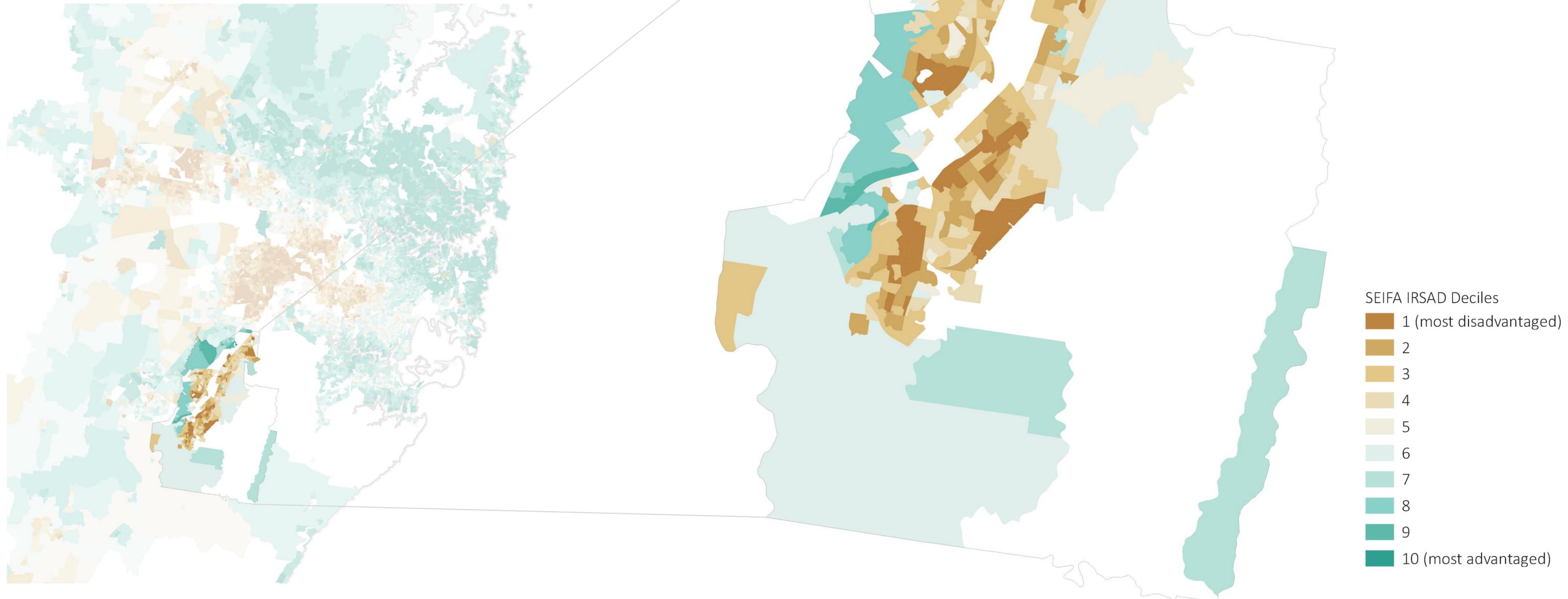


TENURE TYPE CAMPBELLTOWN LGA AND GREATER SYDNEY - 2021



Advantage and disadvantage

Socio-economic inequality levels are lower in Campbelltown than in other parts of Greater Sydney. But there are pockets of advantage and disadvantage even within the Campbelltown LGA.

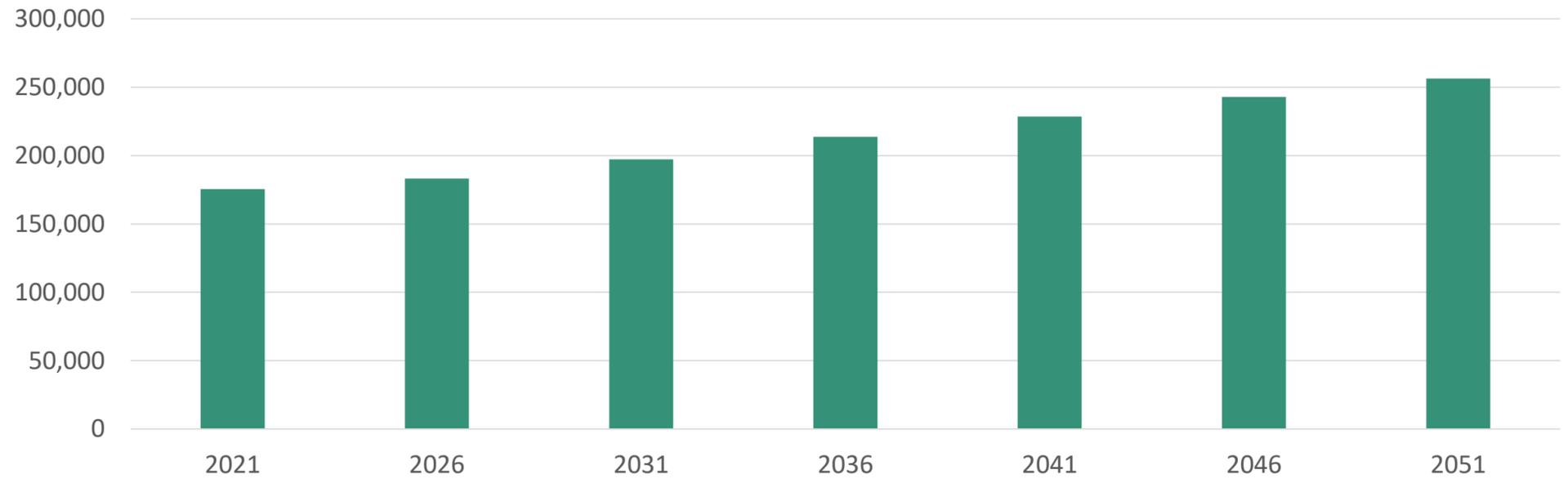


Population Forecasts

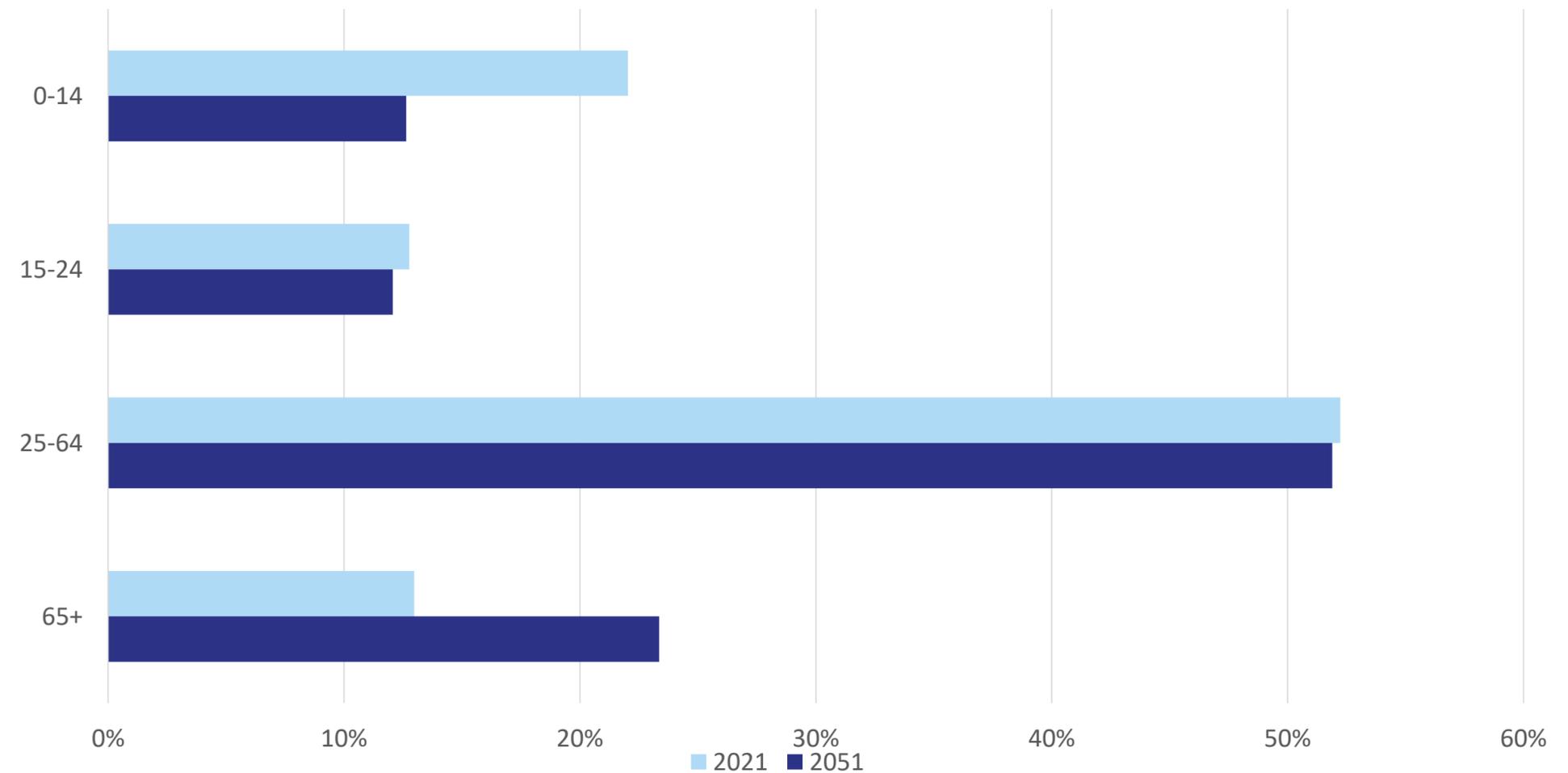
Campbelltown currently has a large proportion of young children, aligned with families moving into greenfield areas.

This is projected to shift towards an older population, **with almost a quarter of residents being over 65 by 2051**. This has implications for health care and social assistance for Campbelltown in the future.

POPULATION FORECASTS CAMPBELLTOWN LGA: 2021-2051



AGE FORECASTS CAMPBELLTOWN LGA: 2021-2051



02

Economy



The Campbelltown economy

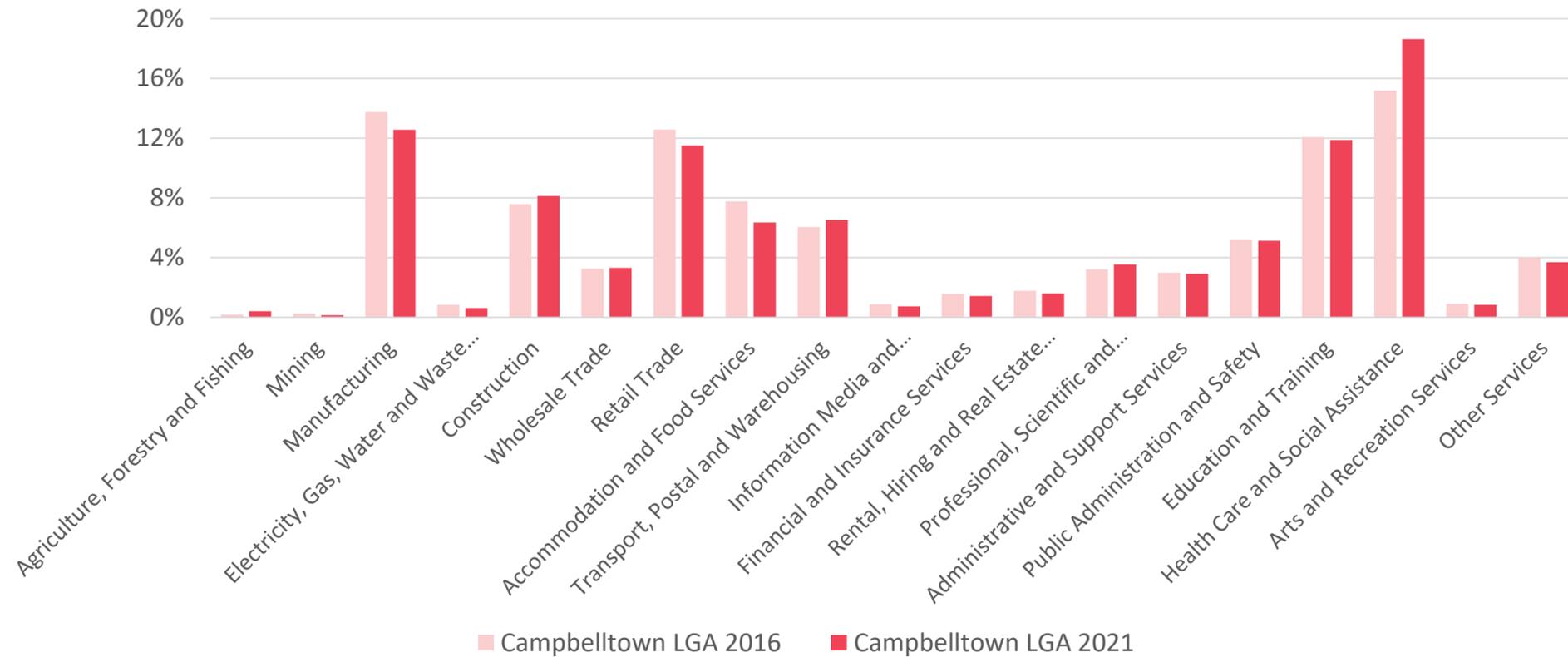
9%

Jobs in Campbelltown increased by 9% between 2016 and 2021, with Health Care and Social Assistance the largest industry.

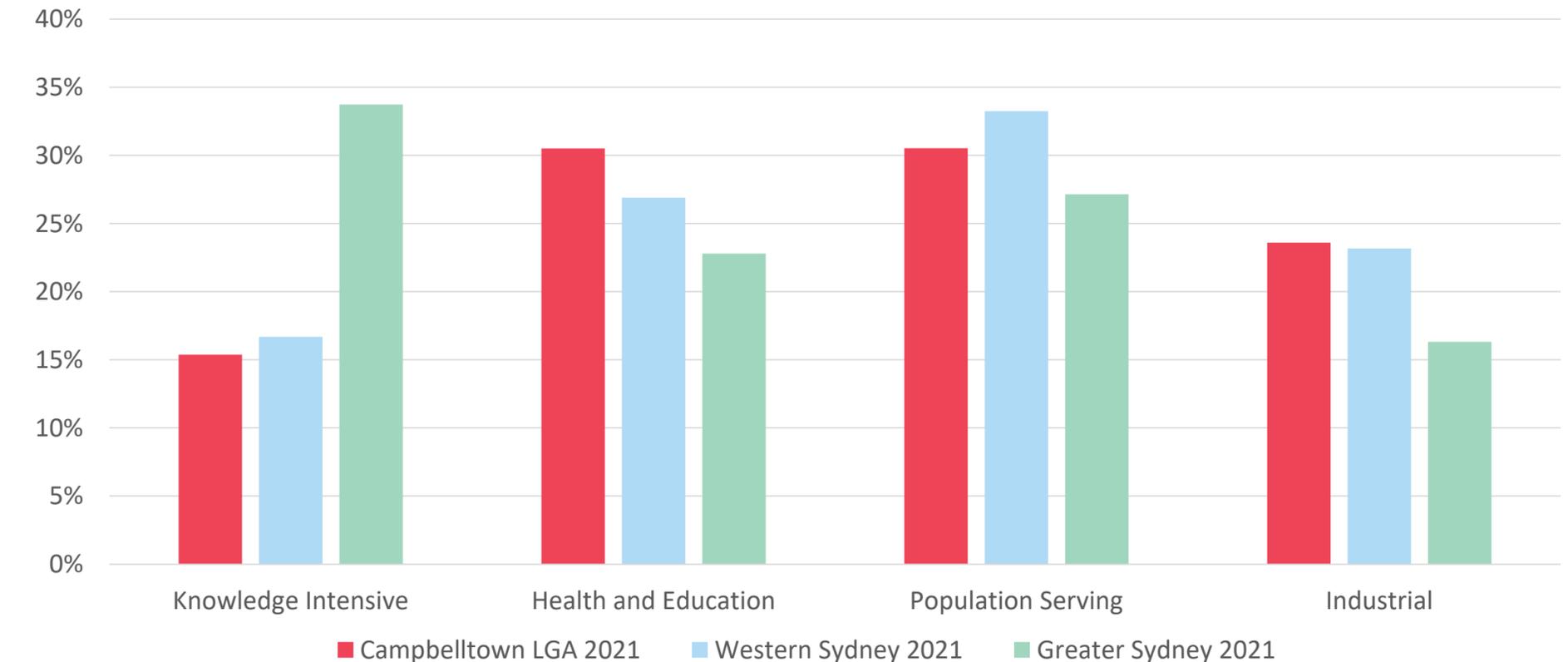
61%

Health and Education and Population Serving jobs such as Retail and Construction make up 61% of Campbelltown's jobs.

CHANGE IN INDUSTRY COMPOSITION CAMPBELLTOWN LGA, 2016 - 2021



COMPARISON OF INDUSTRY COMPOSITION – CAMPBELLTOWN, WESTERN SYDNEY AND GREATER SYDNEY, 2021



Economic contribution

The Campbelltown economy contributes

\$6.7B

to the economy, led by the

Manufacturing, Health Care and Social Assistance industries and Construction.

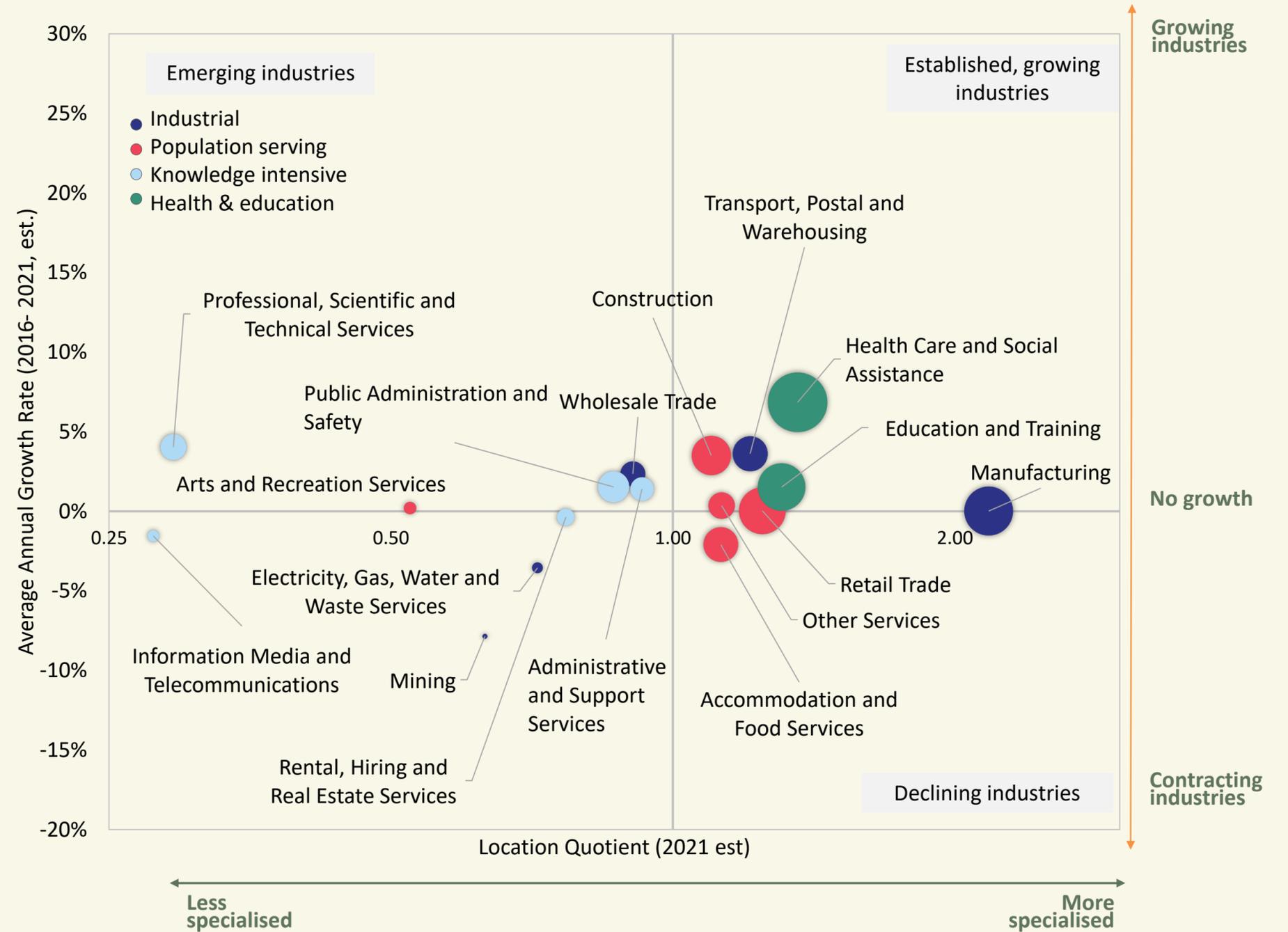
GROSS REGIONAL PRODUCT OF CAMPBELLTOWN LGA, 2022



Economic specialisation

Compared with Greater Sydney, Campbelltown industries of specialisation tend towards **Manufacturing and Health Care.**

INDUSTRY SPECIALISATION - CAMPBELLTOWN LGA COMPARED TO GREATER SYDNEY: 2016-2021



Economic specialisation

Knowledge Intensive

- Information Media and Telecommunications
- Financial and Insurance Services
- Rental, Hiring and Real Estate Services
- Professional, Scientific and Technical Services
- Administrative and Support Services
- Public Administration and Safety

Health and Education

- Education and Training
- Health Care and Social Assistance

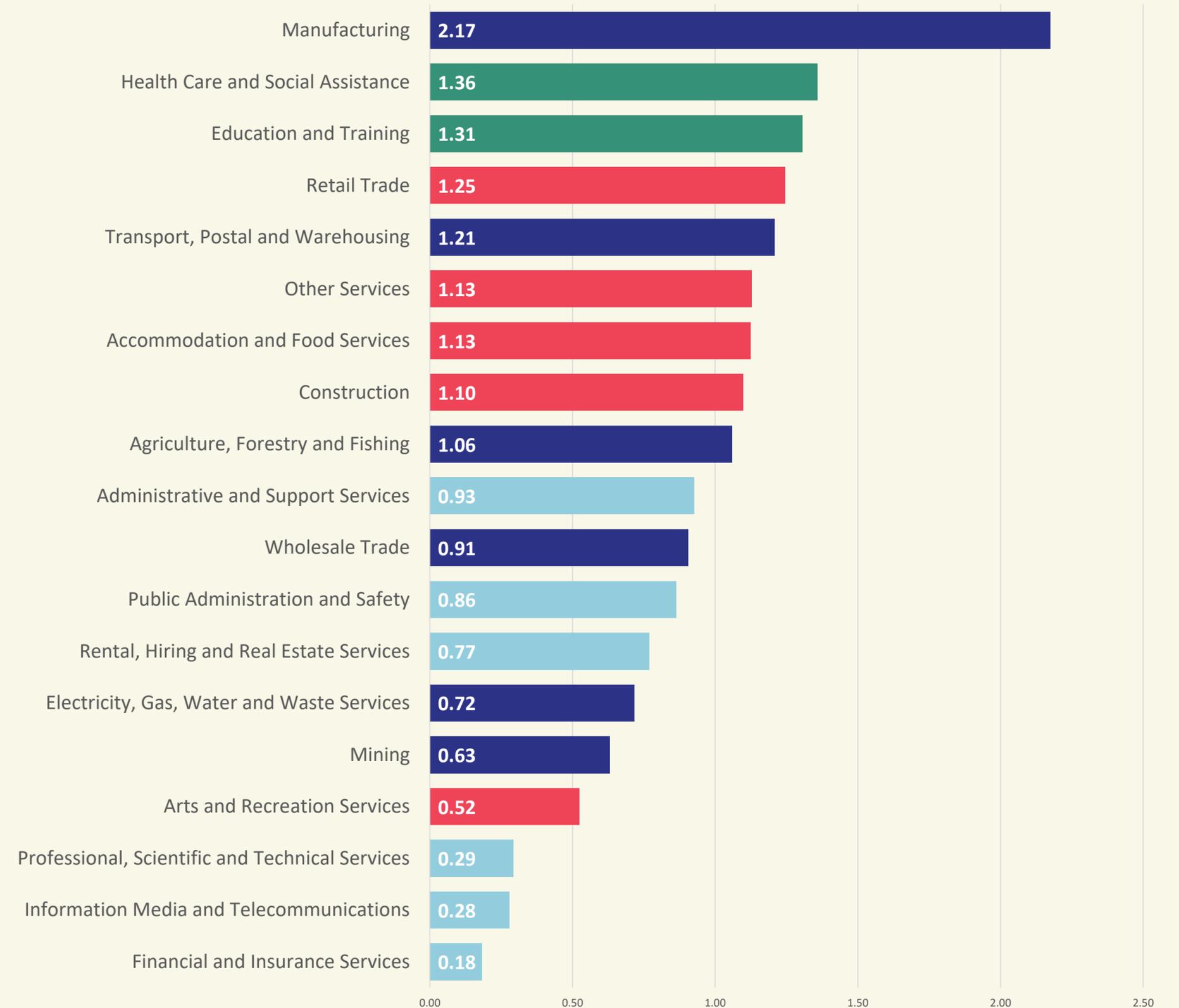
Population Serving

- Construction
- Retail Trade
- Accommodation and Food Services
- Arts and Recreation Services
- Other Services

Industrial

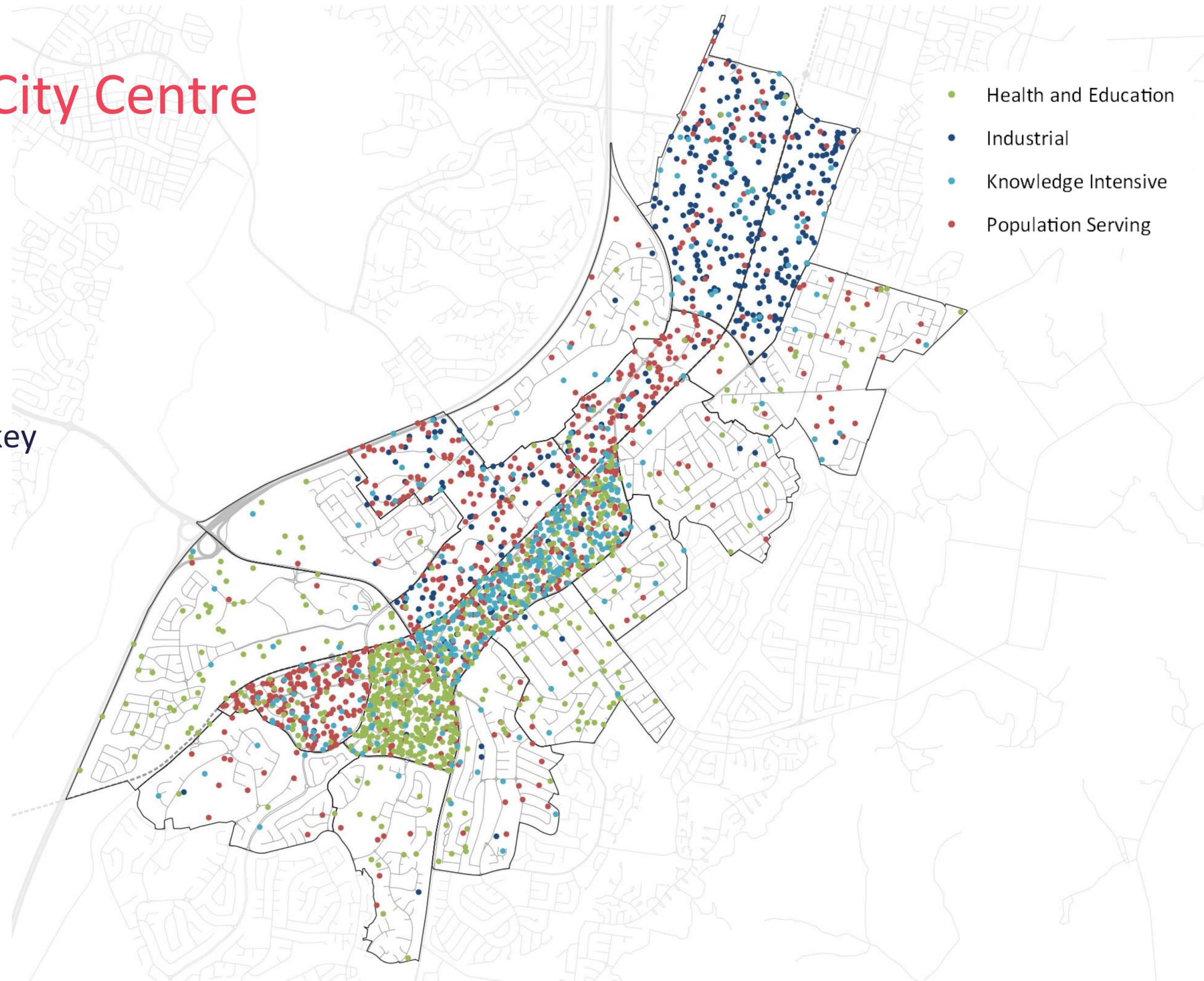
- Agriculture, Forestry and Fishing
- Mining
- Manufacturing
- Electricity, Gas, Water and Waste Services
- Wholesale Trade
- Transport, Postal and Warehousing

INDUSTRY SPECIALISATION - CAMPBELLTOWN LGA COMPARED TO GREATER SYDNEY: 2016-2021



The Campbelltown City Centre

Job distribution by industry has clear spatial patterns, reflecting land uses, planning controls and key assets such as hospitals and high streets.

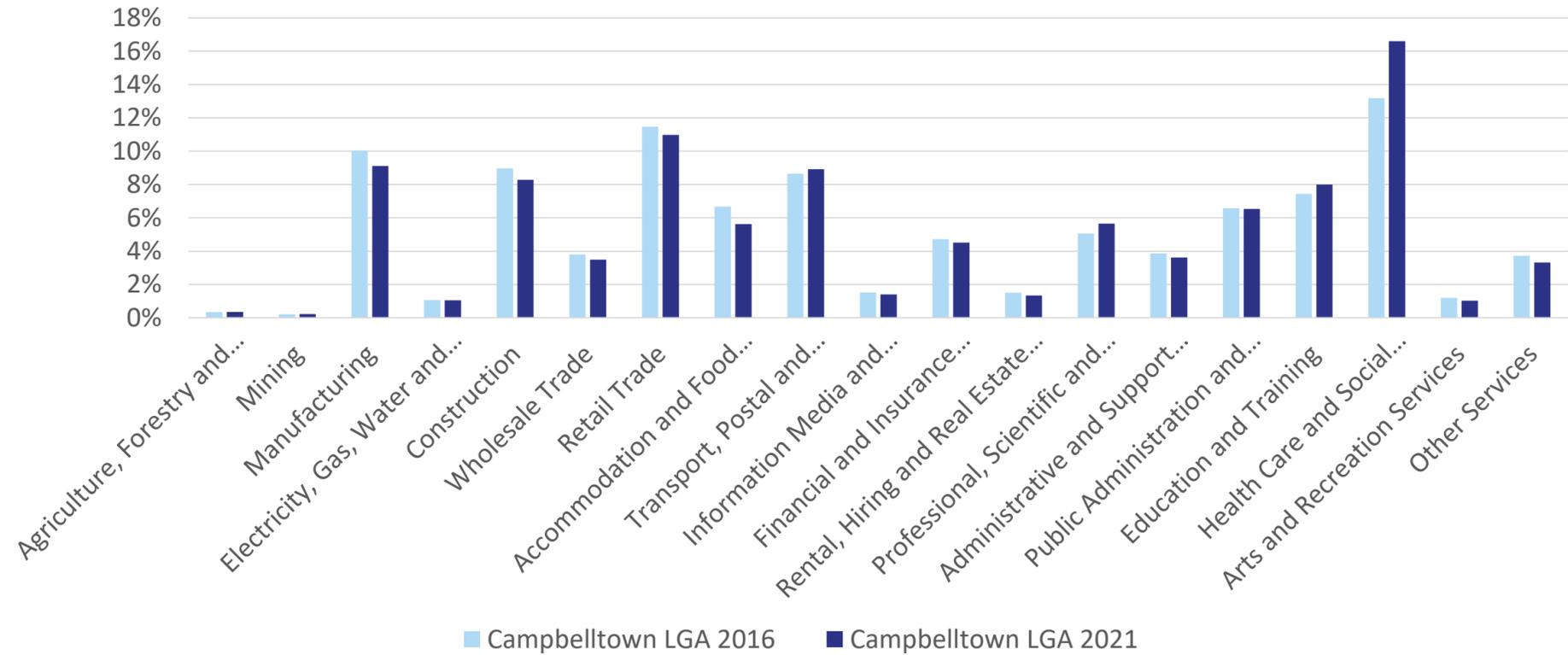


Labour force

Campbelltown residents working in the **Health Care and Social Assistance** industry increased by 33% between 2016 and 2021.

Campbelltown's local resident population aligns well with the local industries and specialisations.

CAMPBELLTOWN LGA RESIDENTS INDUSTRY OF EMPLOYMENT, 2016-2021



CAMPBELLTOWN LGA RESIDENTS COMPARED TO GREATER SYDNEY RESIDENTS INDUSTRY OF EMPLOYMENT, 2021



Labour force

62%

Health Care and Education and Population Serving jobs each make up 31% of jobs in the Campbelltown LGA.

70%+

of jobs in Health and Education are held by women (**78%**), while men hold **72%** of Industrial jobs in the LGA.

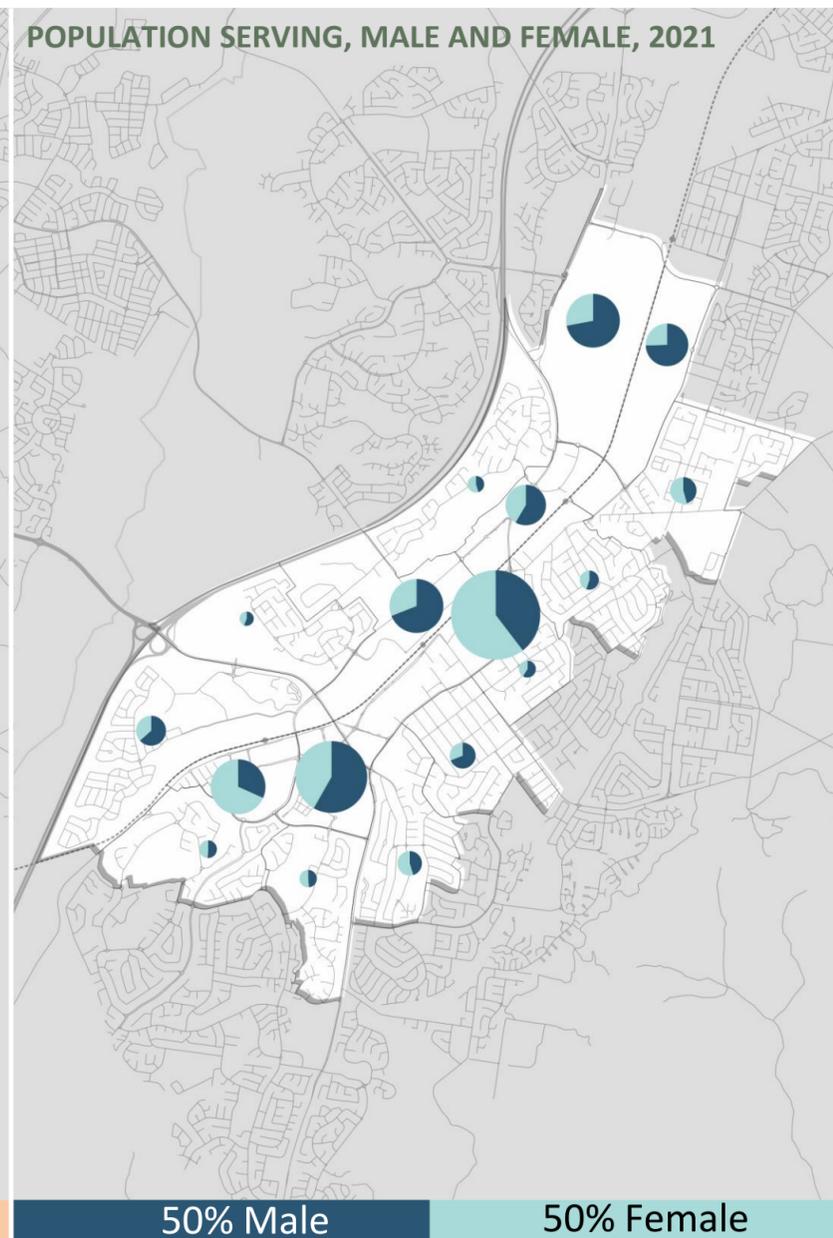
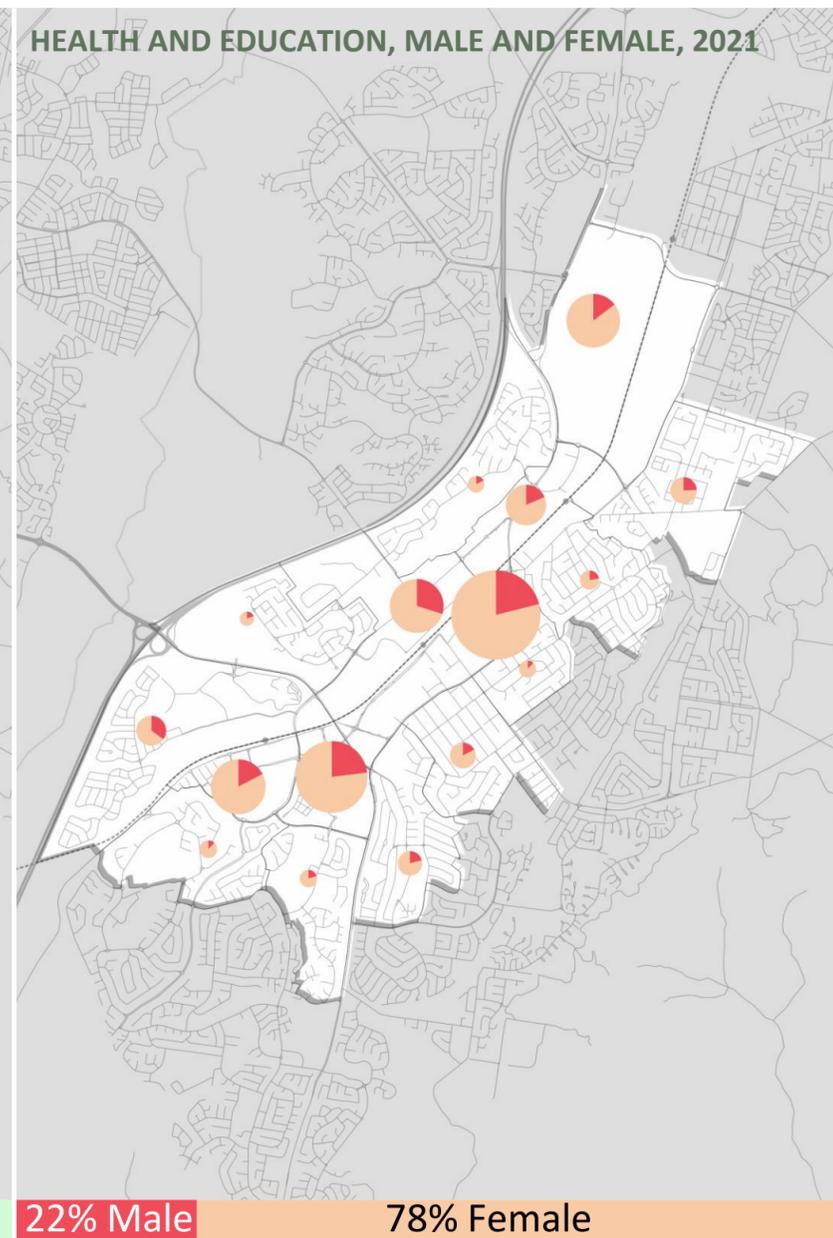
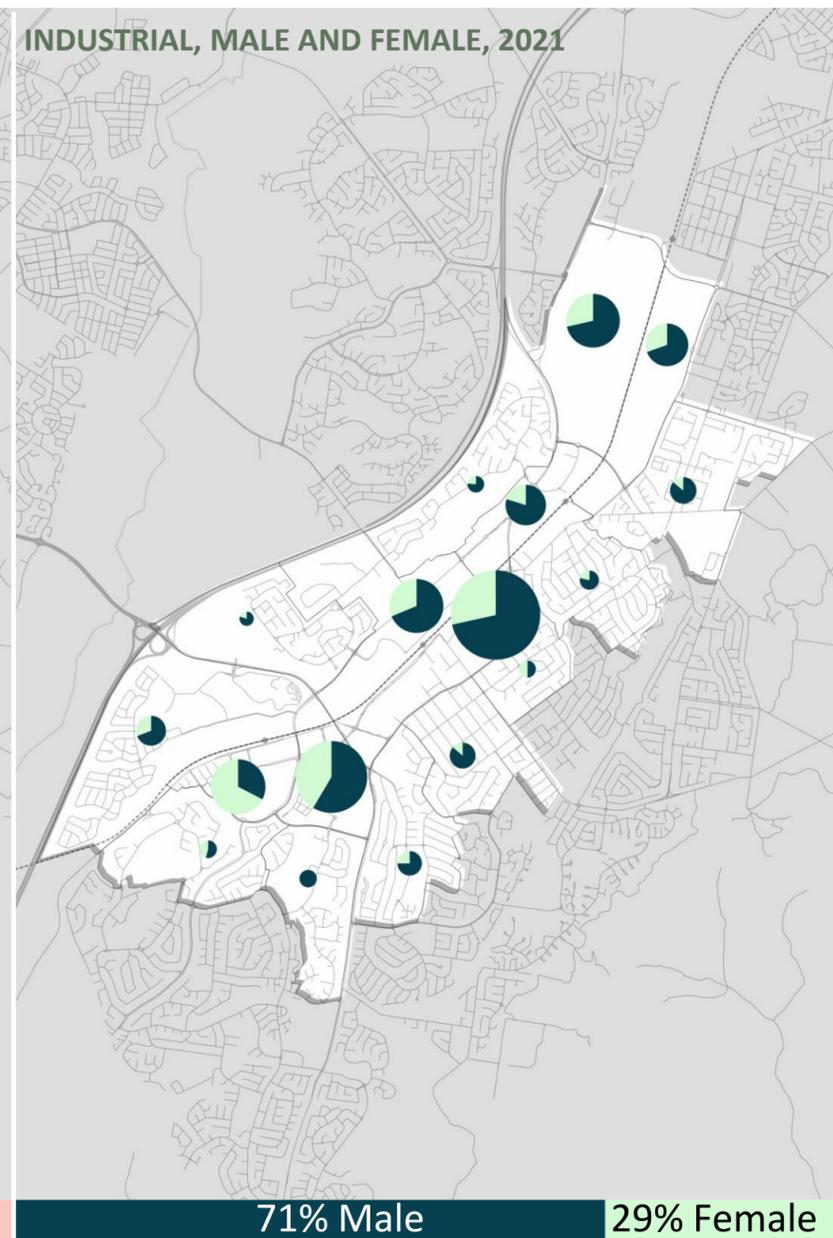
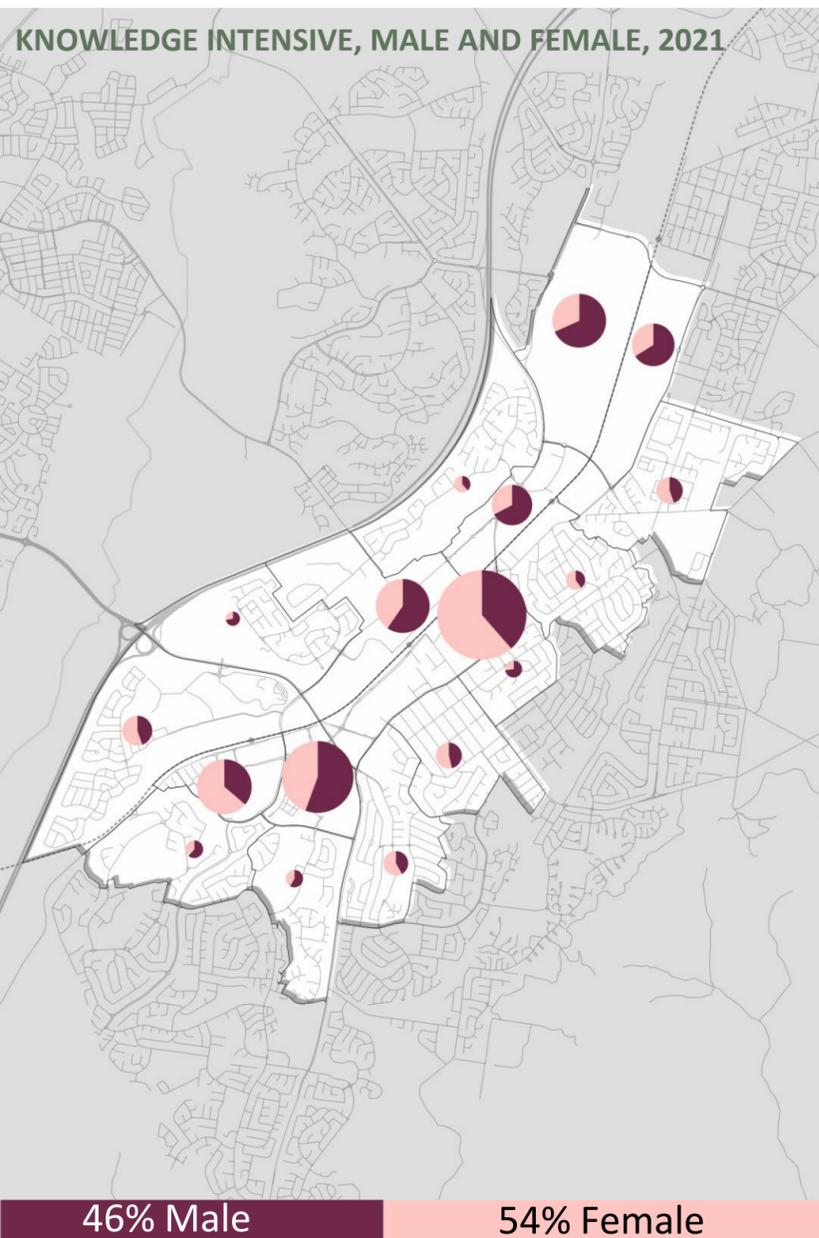
COMPOSITION OF CAMPBELLTOWN LGA BROAD INDUSTRIES, MALE AND FEMALE, 2021



Source: ABS Census, 2021

The Campbelltown City Centre

Clear spatial distinctions are seen when each industry cluster is split by gender.



The changing nature of work

26%

of the Campbelltown population worked from home on census day, compared with **40%** across Greater Sydney. This indicates a workforce that still needs to travel to work in health, education and production-related industries.

It was, however, an increase of over 1,000% compared with 2016, highlighting the substantial shift that COVID-19 has had on how and where we work.

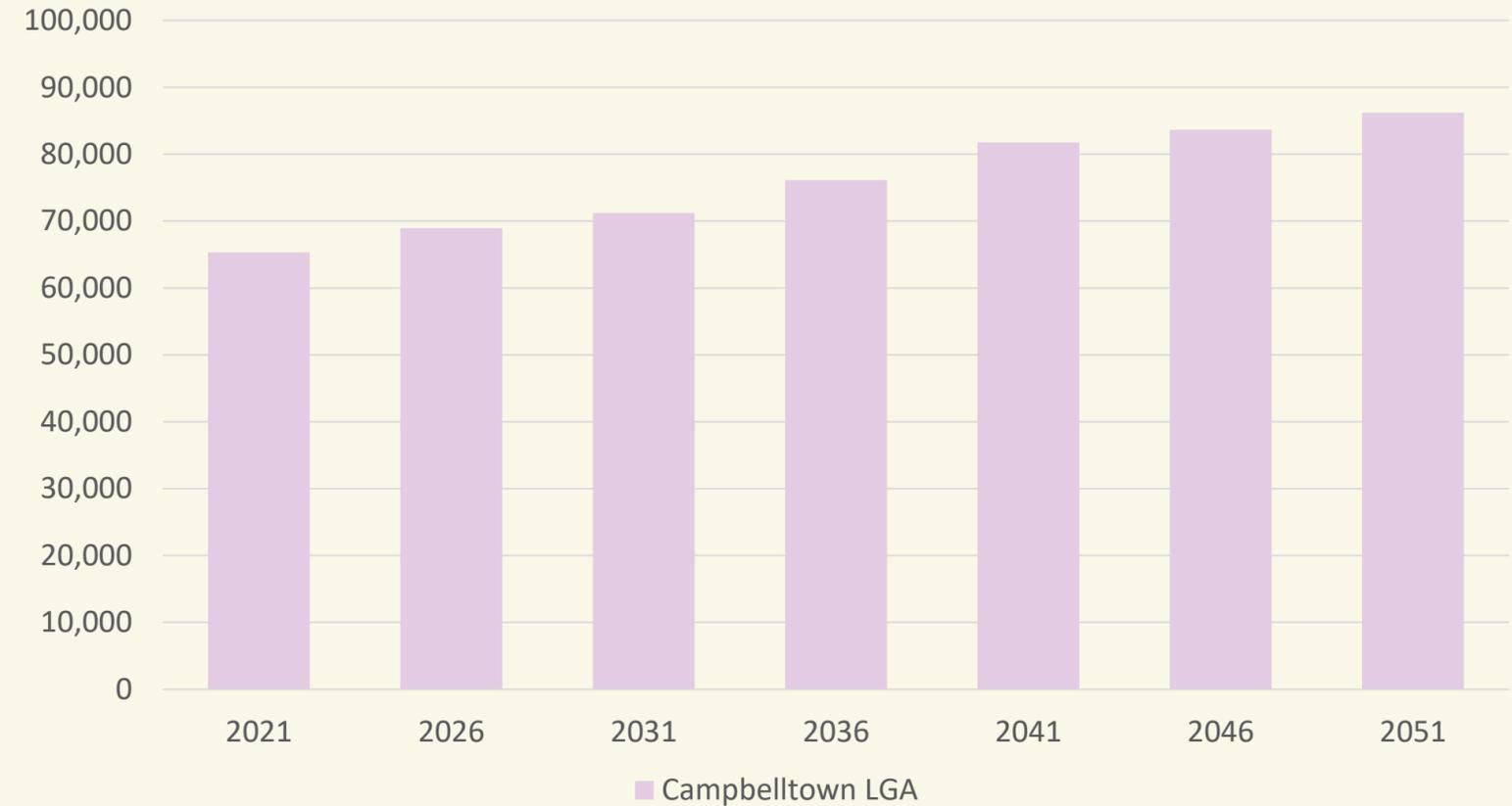


Future jobs

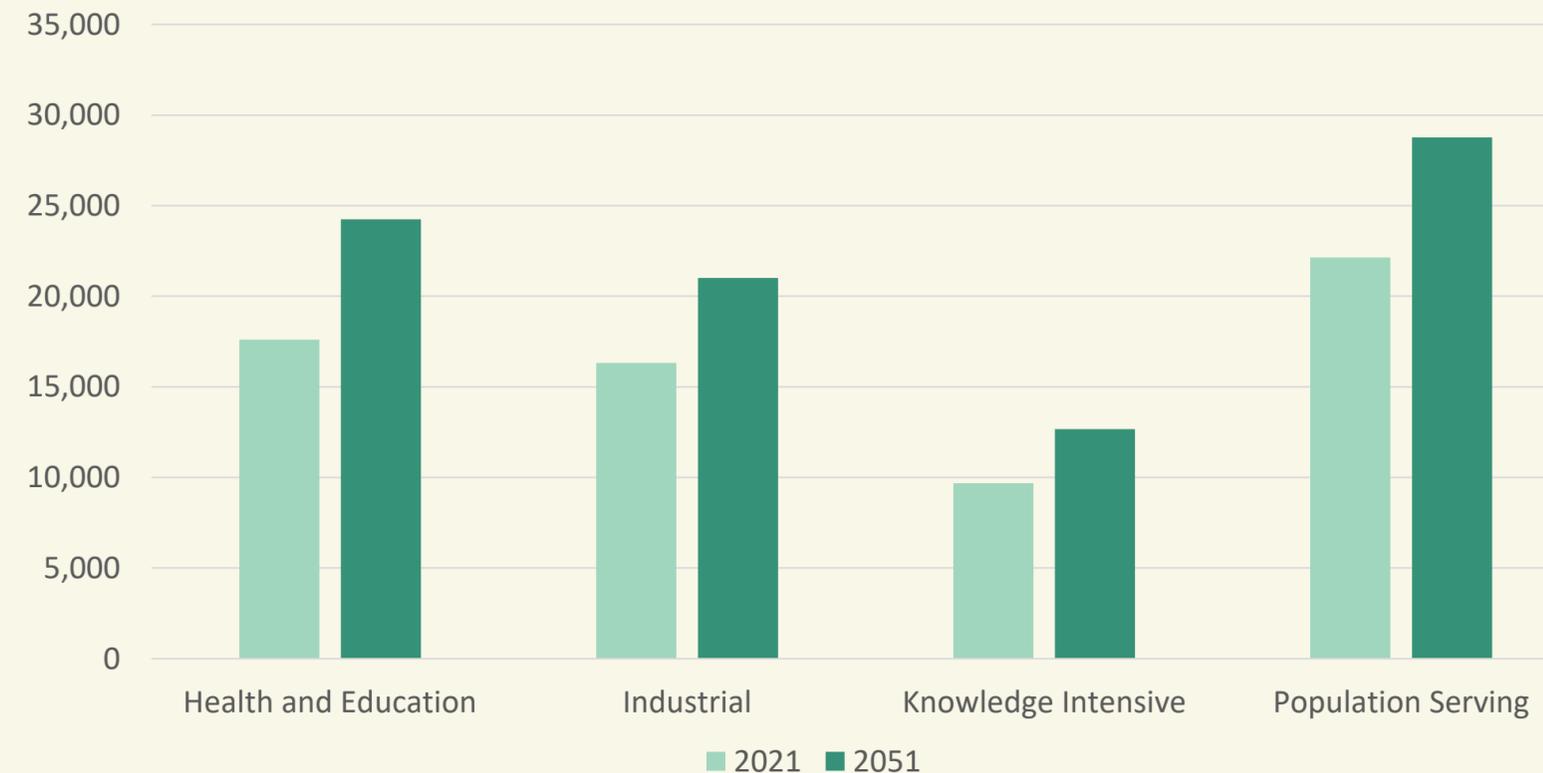
Jobs are expected to increase to **86,000** by 2051 with half of all jobs expected to be in and around the Campbelltown City Centre.

Health and Education jobs are expected to grow the most, by **38%** between 2021 and 2051, continuing the important role Campbelltown plays as a population-centric local economy.

EMPLOYMENT FORECASTS: 2021-2051 CAMPBELLTOWN LGA AND CITY CENTRE



EMPLOYMENT FORECASTS BY BIC: 2021-2051 CAMPBELLTOWN LGA



03

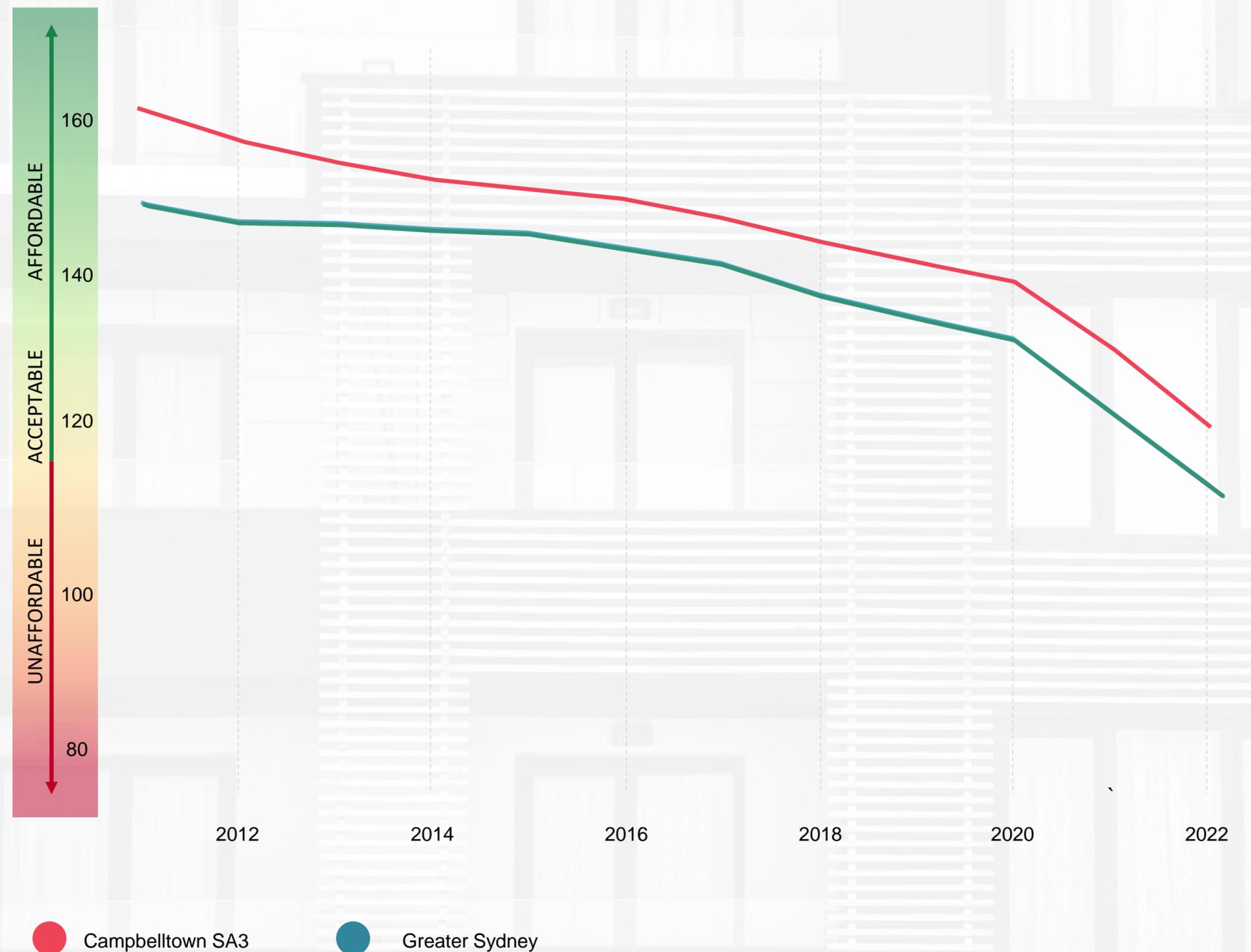
Liveability

Affordability

Campbelltown is more affordable to rent in than in the rest of Greater Sydney.

However, rental affordability has declined at the same rate as Greater Sydney over the past decade.

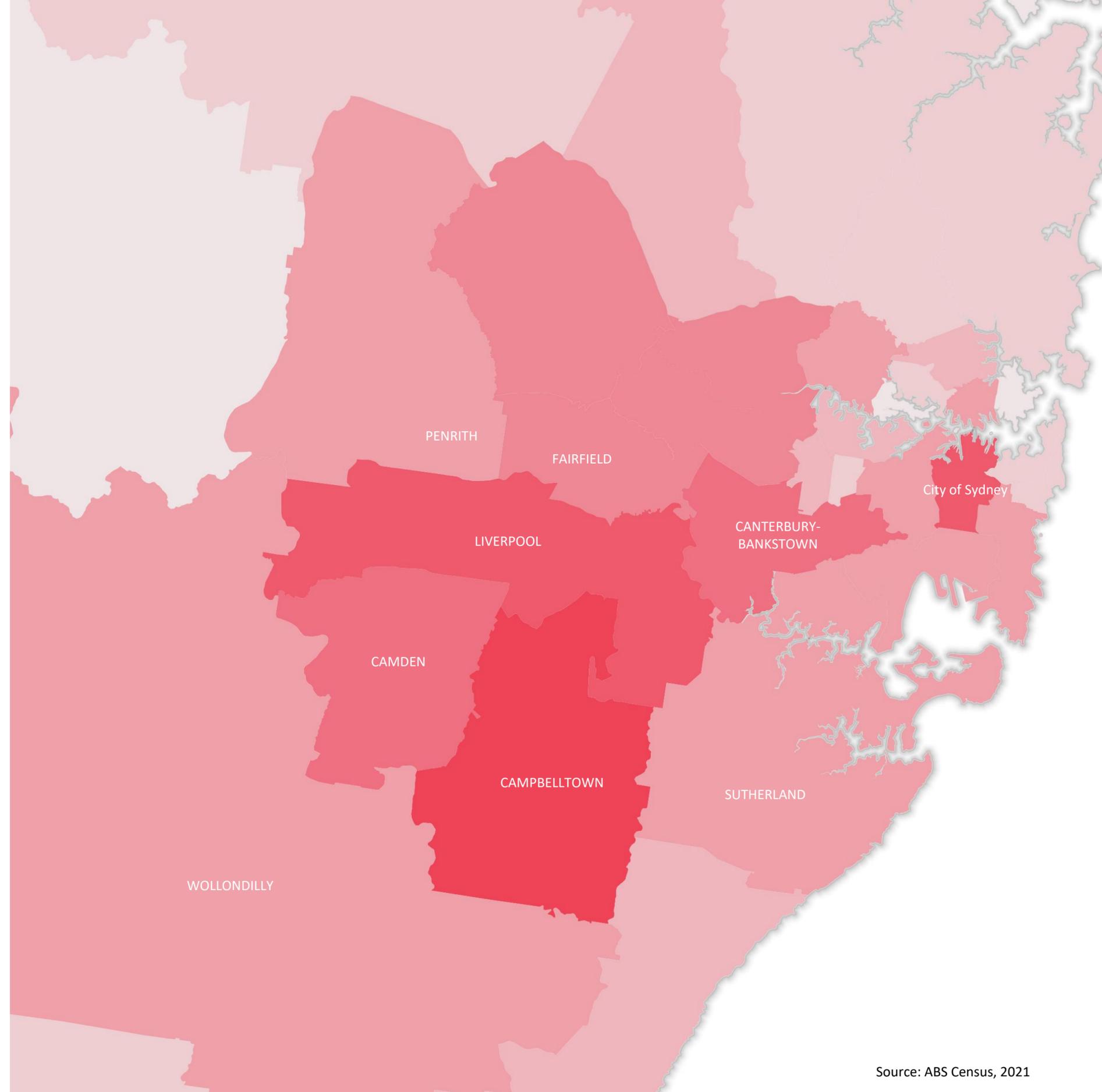
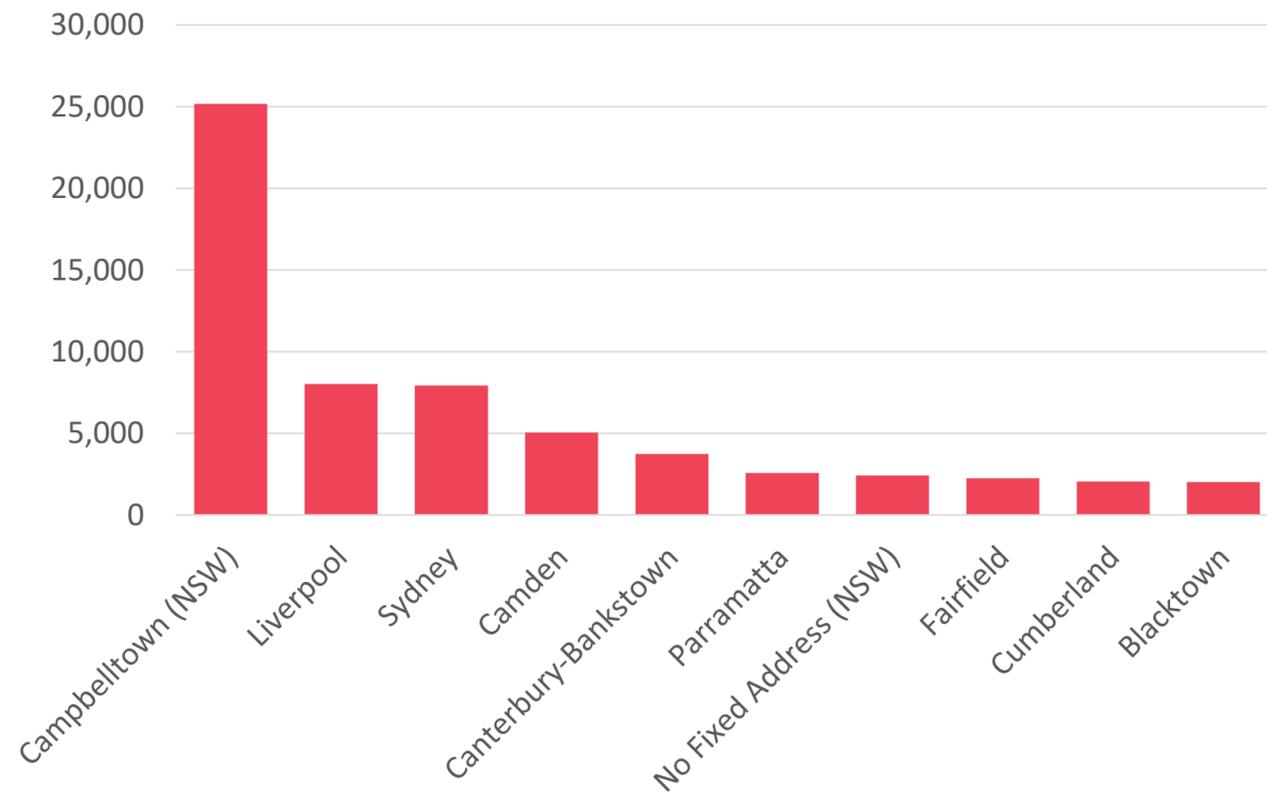
SGS RENTAL AFFORDABILITY INDEX, CAMPBELLTOWN SA3 COMPARED TO GREATER SYDNEY – 2012-2022



Outbound workforce

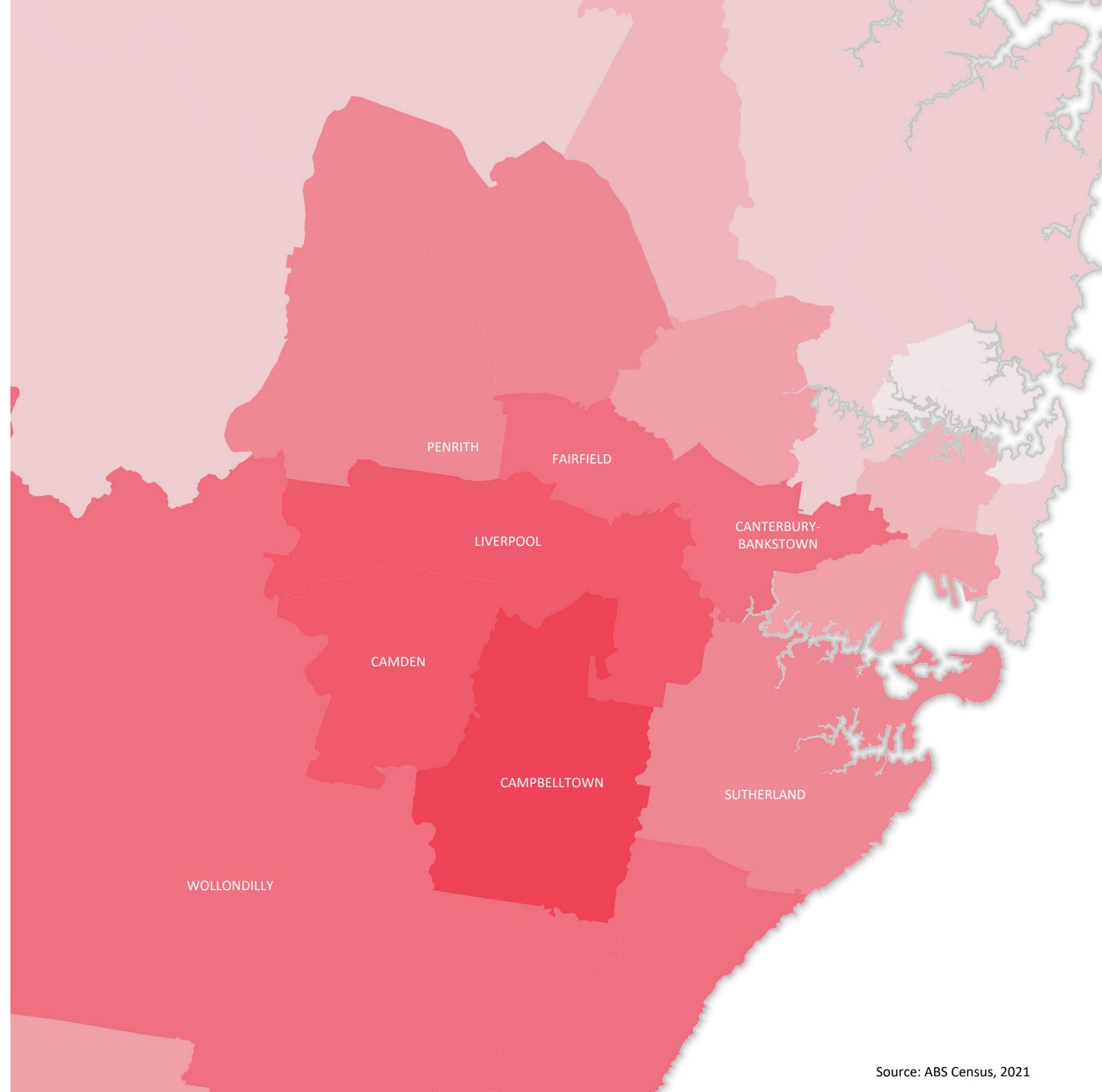
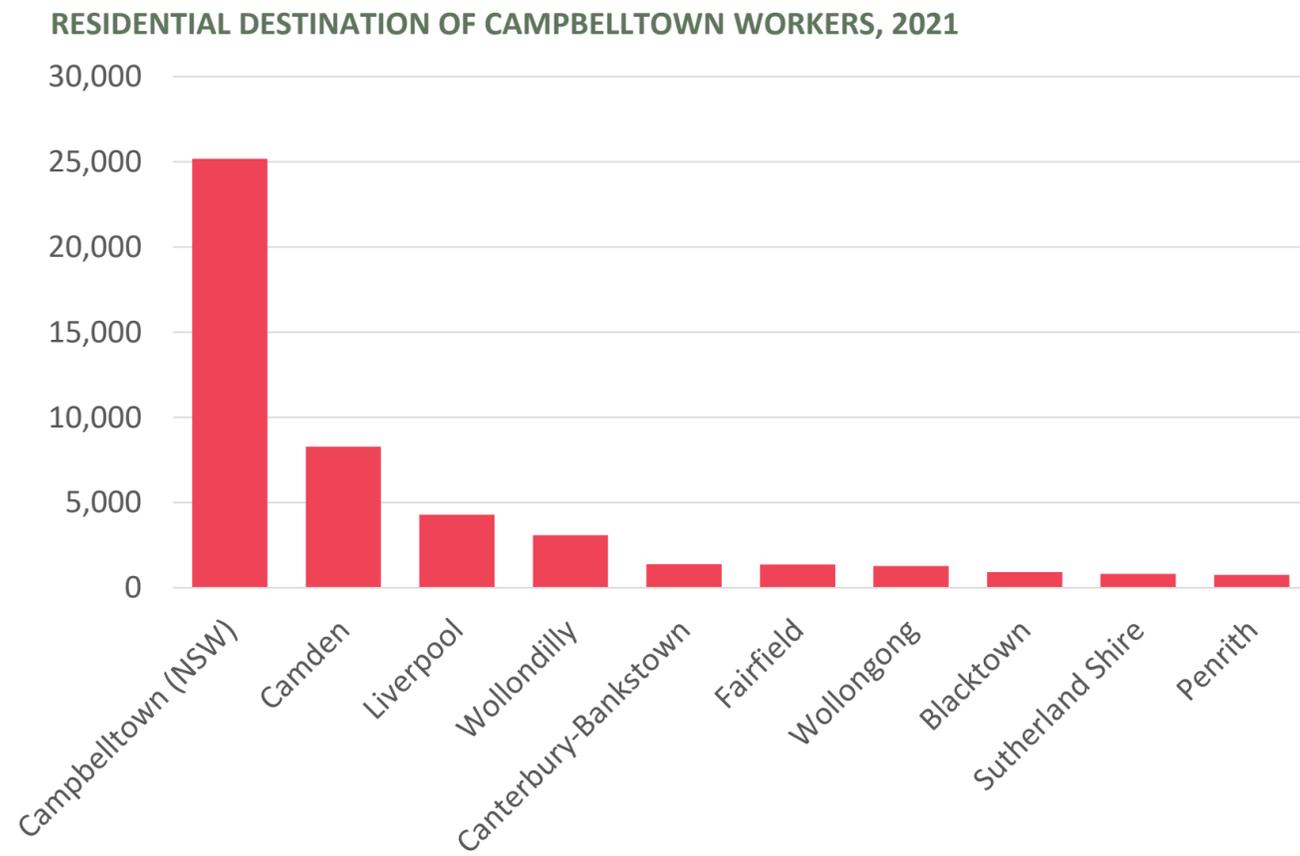
Campbelltown has a high degree of self-containment, with **35%** of employed residents working locally in the LGA.

WORK DESTINATION OF CAMPBELLTOWN RESIDENTS, 2021



Inbound workforce

Nearly half of the workers in Campbelltown live locally, while 30% of other workers live in the neighbouring Western Sydney LGAs of Camden, Liverpool or Wollondilly.

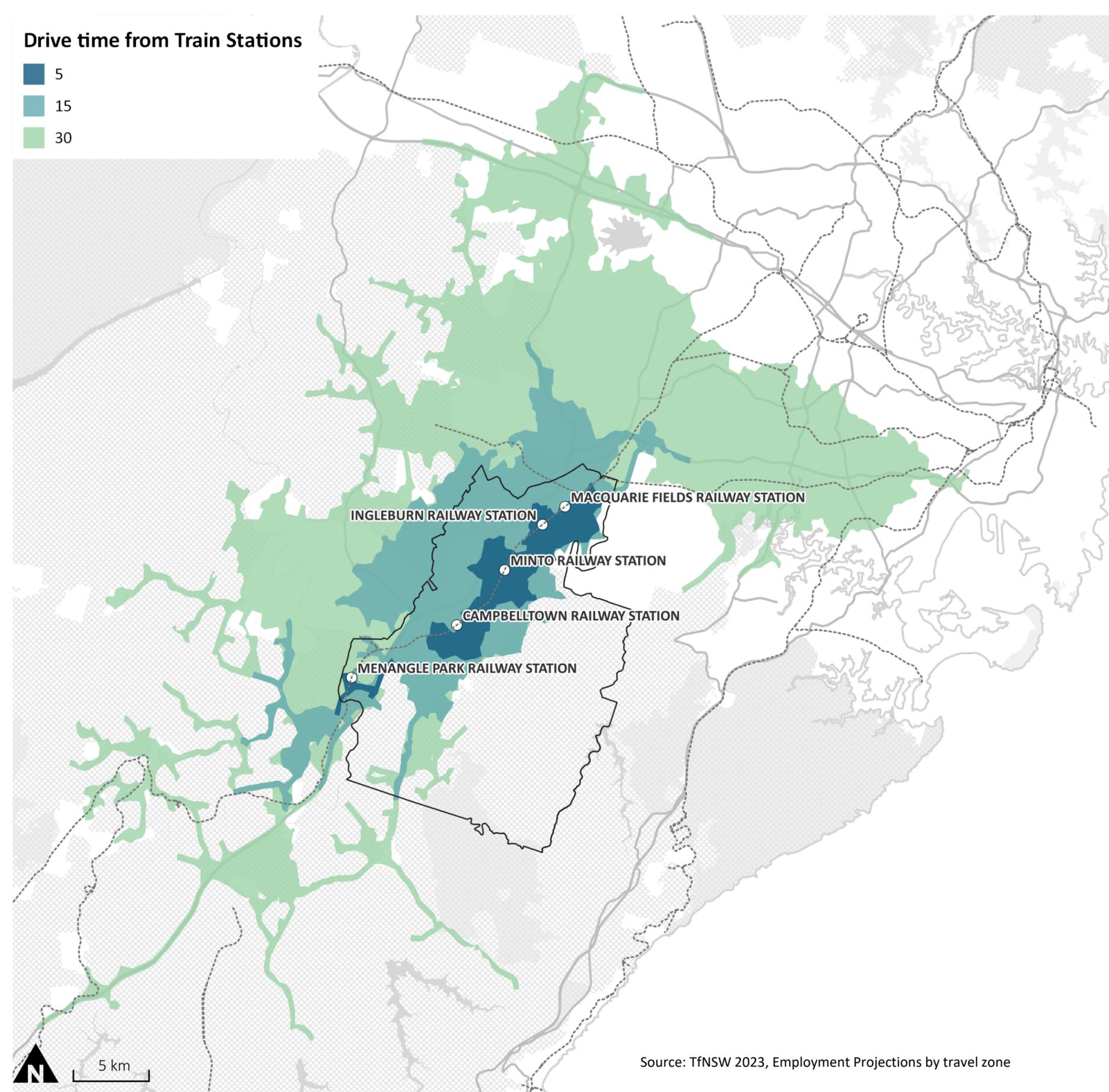


Access to job opportunities

Access to jobs (by vehicle) originating from Campbelltown's train stations highlights the challenge for diverse employment opportunities for Campbelltown residents.

While there are **52,500 jobs** in the Campbelltown LGA, within 30 minutes' drive of the LGA's local train stations there are approximately **435,000 jobs** that can be reached.

This highlights the challenges associated with supporting Campbelltown's growing population and providing good access to a diverse range of jobs.

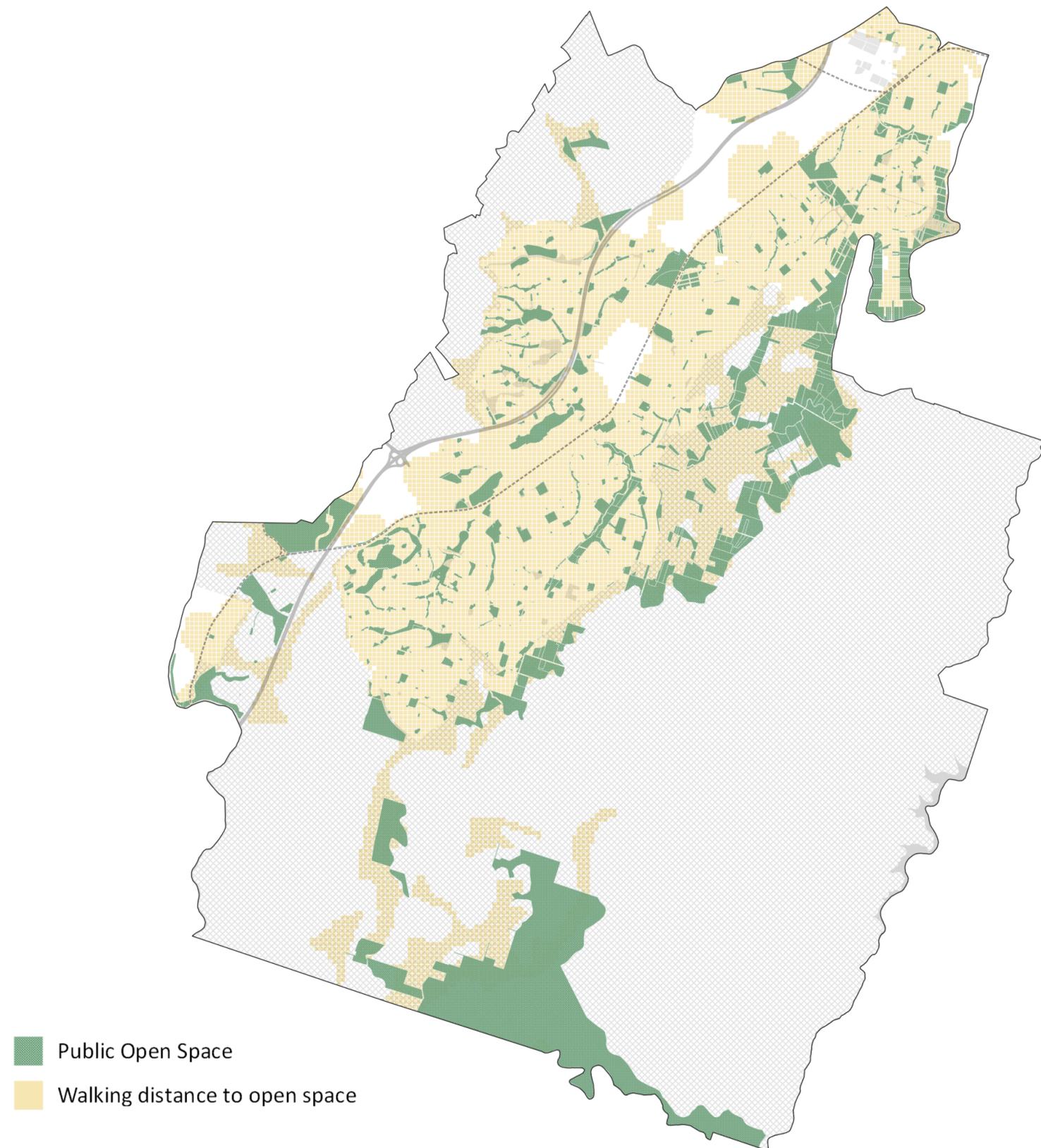


Access to open space

HOUSEHOLDS WITHIN 10 MINUTES' WALK OF PUBLIC OPEN SPACE

95%

of dwellings in Campbelltown are within a 10-minute walk of some form of public open space.



Tree canopy coverage

TREE CANOPY COVERAGE, LIVERPOOL LGA, 2019

22%

of the Campbelltown LGA has less than 10% tree canopy coverage.

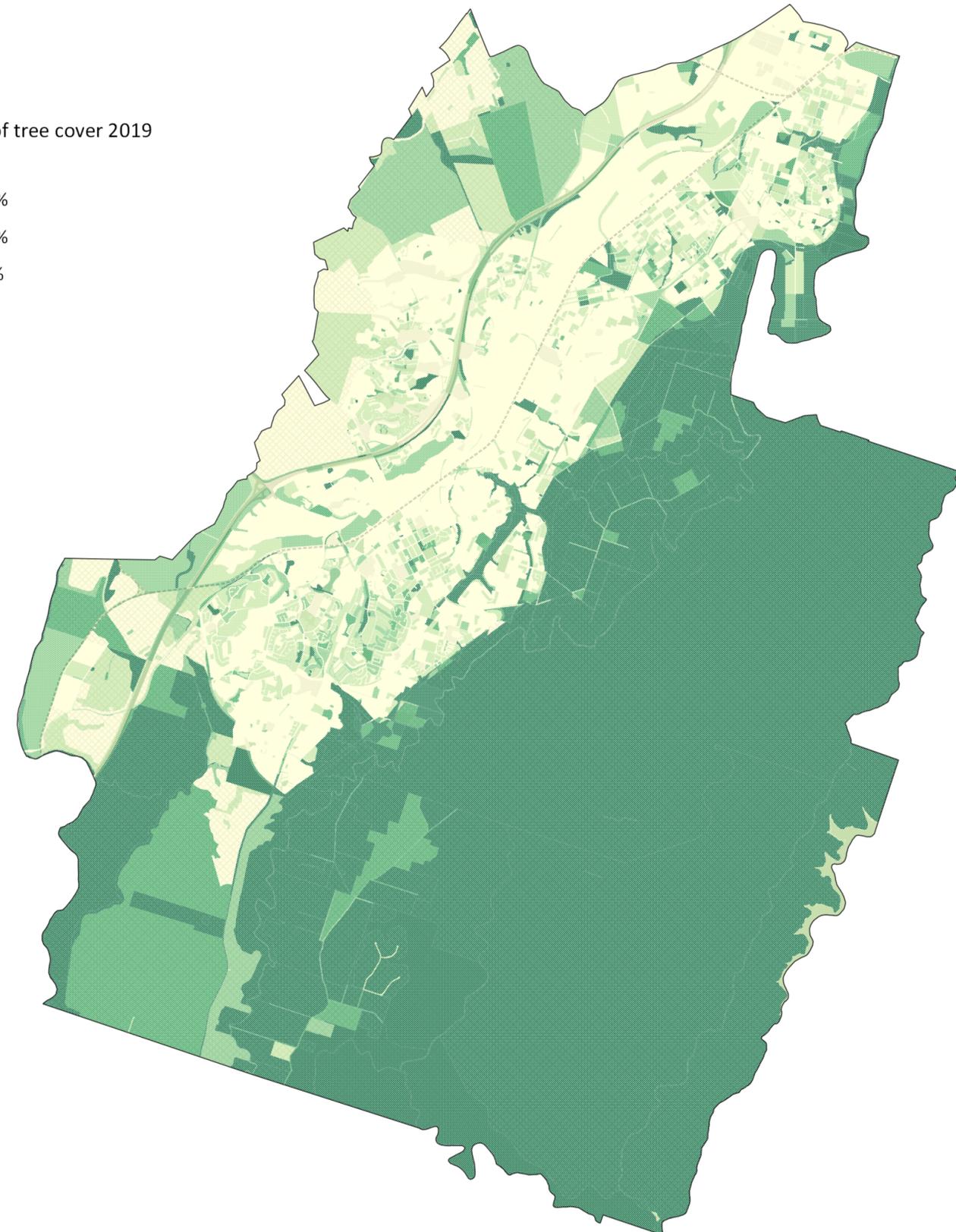
78%

of the Campbelltown centre has less than 10% tree canopy coverage.

Legend

Percentage of tree cover 2019

- 0 - 10%
- 11% - 20%
- 21% - 30%
- 31% - 40%
- > 41%



Urban heat

28%

of the Campbelltown LGA has seen average temperatures at least six degrees higher than baseline expectations.

32%

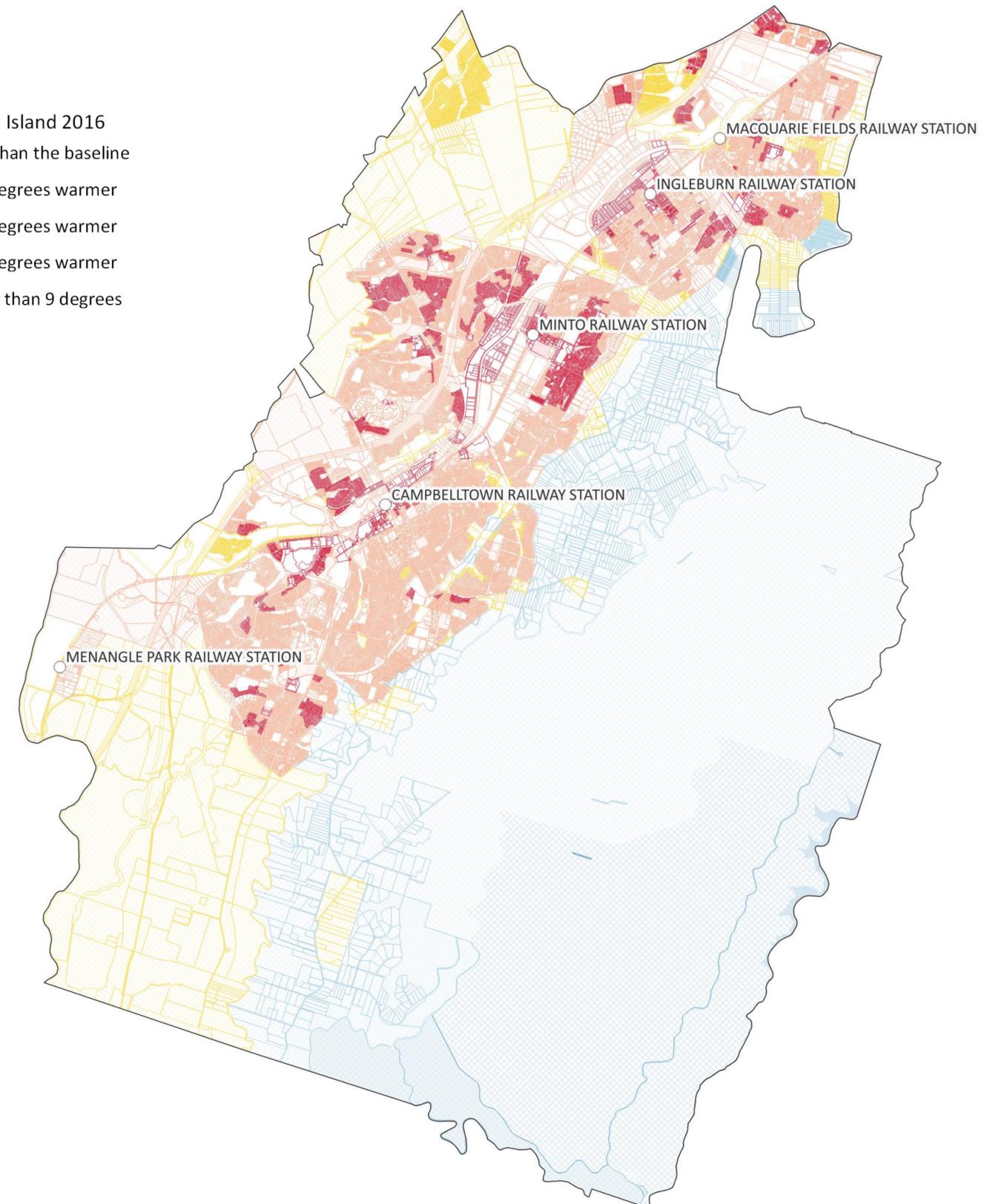
of the Campbelltown centre has observed an increase of nine degrees or more than the baseline surface temperature.

CHANGE IN URBAN HEAT LEVELS FROM BASELINE,
LIVERPOOL LGA, 2016

Legend

Urban Heat Island 2016

- cooler than the baseline
- 0 to 3 degrees warmer
- 3 to 6 degrees warmer
- 6 to 9 degrees warmer
- warmer than 9 degrees





Wellbeing



SGS Cities and Regions Wellbeing Index

Socio-economic insights from
our cities and regions

SGS Cities and Regions Wellbeing Index

1 Headline Index

7 Wellbeing Dimensions

20 data metrics

Wellbeing Index Approach



Australia's Wellbeing Index

Use the sliders below to change the relative weighting of each sub-index and to see how this impacts the regional Wellbeing Index. **Zoom into the map to view your selected region**

Economy



Income & Wealth



Employment, Knowledge & skills



Housing



Health



Equality, Community & Work-Life Balance



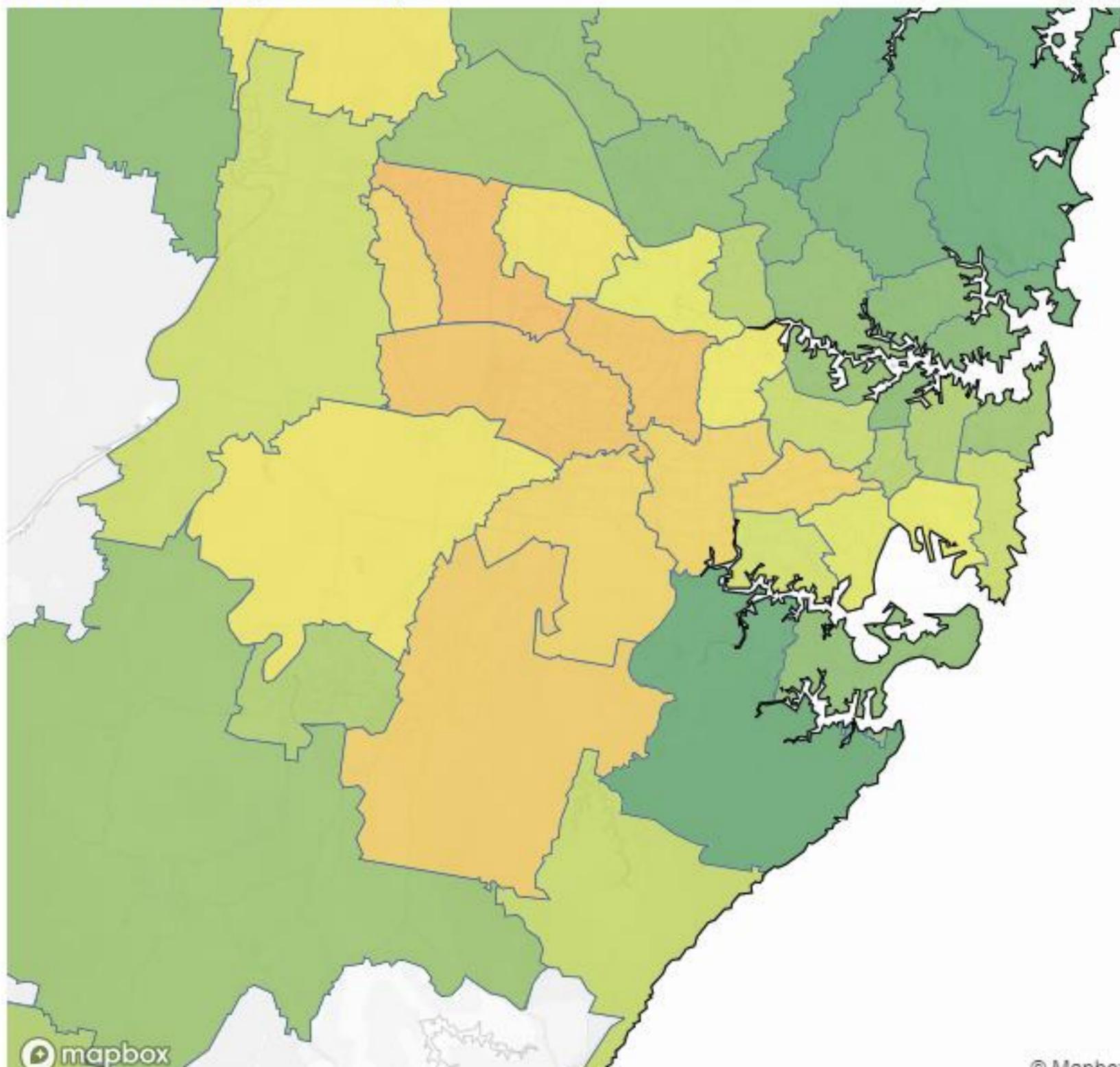
Environment



Statistical Area

All

Headline Wellbeing Index Map



This represents the selected SA3's national rank out of a total of 334 SA3s)

Campbelltown – overall wellbeing score

Campbelltown performs lower than Greater Sydney across most indicators but on par or better than the rest of NSW.

So, what is driving that?

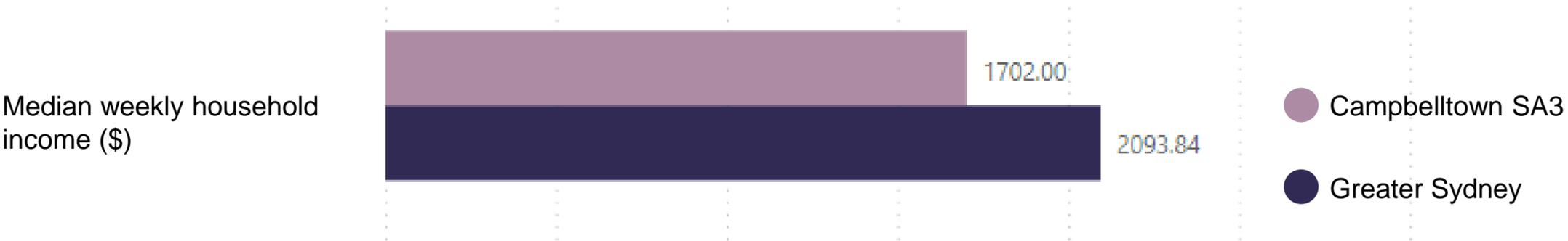
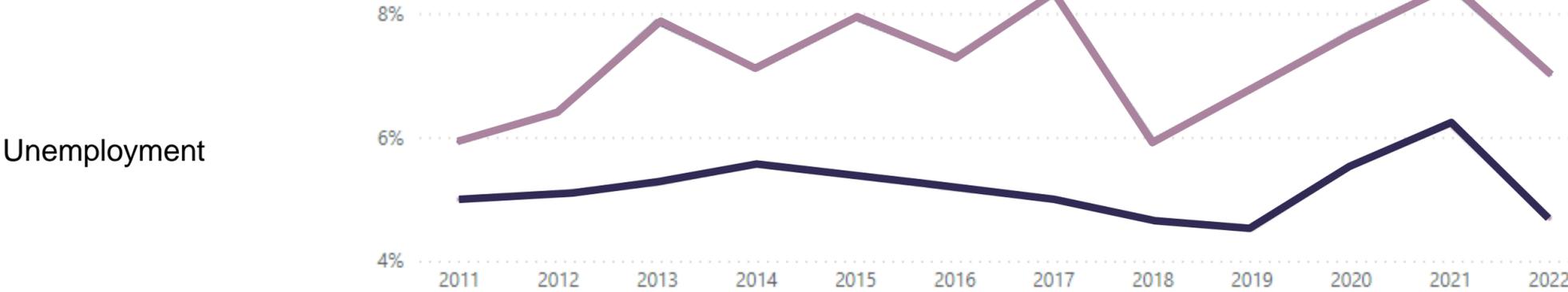
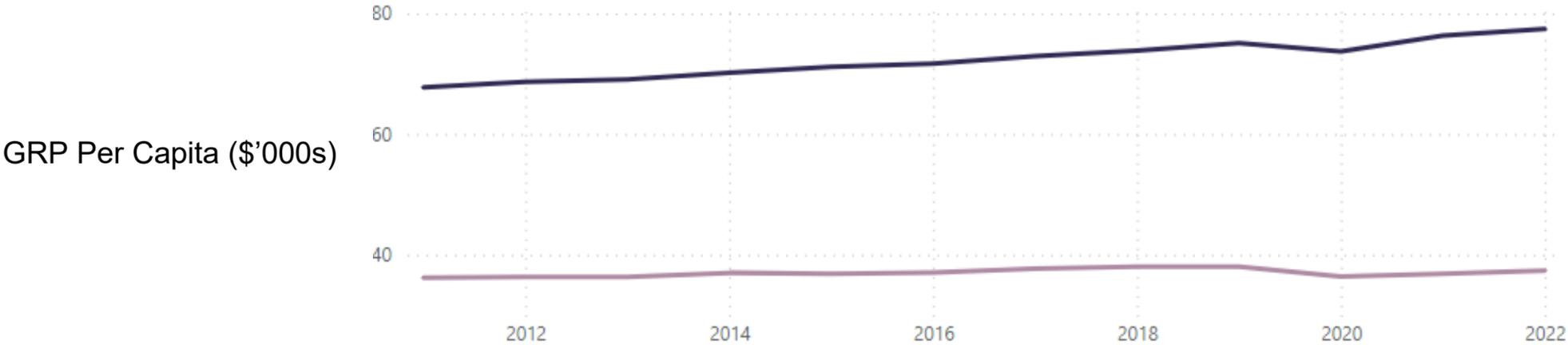


Source: SGS, 2023

Source: SGS, 2023

Campbelltown – Economy, Income and wealth

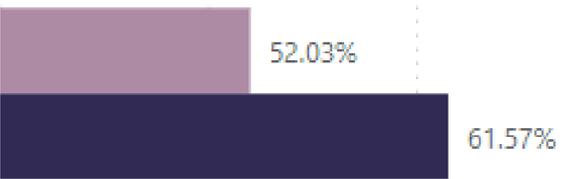
Campbelltown has a lower GDP per capita and a median weekly household income less than the Greater Sydney average.



Campbelltown – Employment, knowledge and skills & Health

Lower levels of educational attainment, lower labour market participation rates and lower key health markers compared with Greater Sydney.

Cert III or higher qualifications



Labour force employment rate (%)



Labour force participation rate (%)



Life expectancy (years)



Population % with one or fewer health conditions



● Campbelltown SA3
● Greater Sydney

Accessing SGS' Cities and Regions Wellbeing Index

CRWI report

- National overview
- State and cities profiles
- Technical Appendix



The areas with the highest levels of wellbeing in NSW were within the Greater Sydney area, particularly in the north of the city such as the Warringah, North Sydney, and Hills District areas.

The areas with the lowest levels of wellbeing in NSW were in the far west of the state, including Broken Hill, Bourke, and Cobar, as well as some spots along the north coast, such as the Kempsey region.

A large distinction exists between Greater Sydney and the Rest of NSW in the Health sub-index. The average life expectancy for the 2.8 million residents outside the Capital City is 81.5 years, compared to 84.6 years for the 5.3 million that reside within Greater Sydney. Residents in the Rest of NSW area are also more likely to have two or more chronic illnesses.

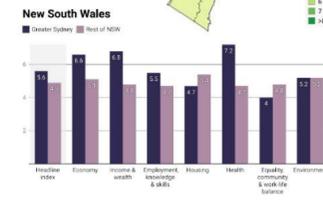
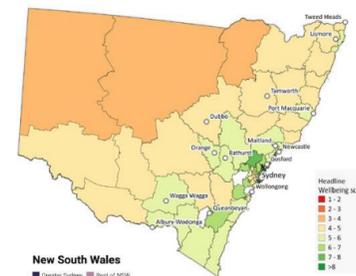
A significant difference between Capital City and Rest of NSW is also found in the Income & Wealth sub-index. Average household incomes were over a third higher in Greater Sydney, and house values (which are households' main store of wealth) were also over a third higher, although a lower share owned their property outright.

A smaller distinction is observed between the Capital City and Rest of NSW region in the Employment, Knowledge and Skills sub-index. On average, Greater Sydney had slightly higher education and participation rates, but a similar unemployment rate. The overall result masks the fact that the 5 lowest-performing regions were in Western Sydney, which highlights the disparity in outcomes within Greater Sydney.

On average, the Rest of NSW performed better than Greater Sydney in the Housing sub-index. This is largely due to Greater Sydney's higher rates of homelessness, overcrowding, and lower rental affordability.

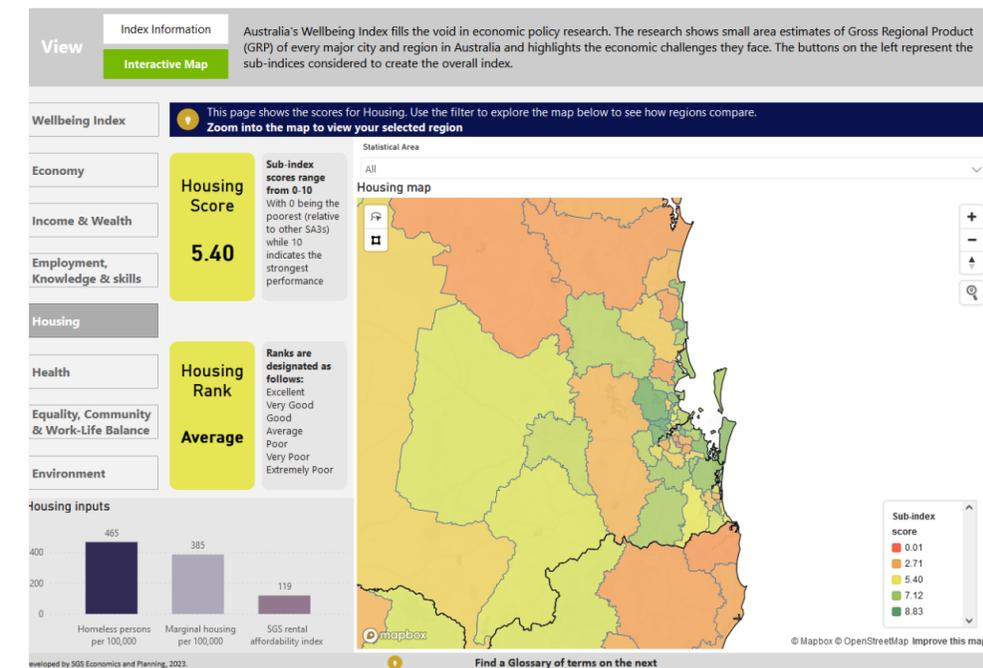
Greater Sydney and Rest of NSW scored similarly in the Economy, Equality, Community & Work-Life Balance, and Environment sub-indices.

See the [interactive dashboard](#) for a detailed breakdown.



Interactive Dashboard

- Interactive map view
- Index information view



<https://sgsep.com.au/projects/sgs-wellbeing-index>

What does this tell us?

Campbelltown is...a place of growth, with nearly 100,000 new residents expected to call the LGA home by 2051 and where many existing Sydney residents choose to move to.

Campbelltown is...a place of homeowners, with over 60% of households owning their home.

Campbelltown is...a more affordable place to both own and rent, although higher education and diverse work opportunities are often further away, with 52,500 jobs in LGA compared with 435,500 jobs within 30 minute's drive of local train stations.

Campbelltown is...an economy catering to its local population with industries such as health and education major local industries of employment and industries many local residents work in.

Campbelltown has...a strong manufacturing sector, twice as specialised as Greater Sydney and the LGA's largest economic contributor, presenting a strategic opportunity to help drive Australia's manufacturing future.

Campbelltown has...a clear spatial distribution of industries which in turn has a clear gender distribution.

Campbelltown has...a distinct split in areas of advantage and disadvantage between new and established suburbs.

Campbelltown is...blessed with good access to open space and proximity to natural assets such as National Parks.

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Certified



Corporation

