

Economic Impact Assessment

59-67 Karne Street North, Narwee
Opal HealthCare



'Gura Bulga'

Liz Belanjee Cameron

'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.

By using the green and blue colours to represent NSW, this painting unites the contrasting landscapes. The use of green symbolises tranquillity and health. The colour cyan, a greenish-blue, sparks feelings of calmness and reminds us of the importance of nature, while various shades of blue hues denote emotions of new beginnings and growth. The use of emerald green in this image speaks of place as a fluid moving topography of rhythmical connection, echoed by densely layered patterning and symbolic shapes which project the hypnotic vibrations of the earth, waterways and skies.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We acknowledge the Gadigal people, of the Eora Nation, the Traditional Custodians of the land where this document was prepared, and all peoples and nations from lands affected.

We pay our respects to their Elders past, present and emerging.

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Executive Summary

Opal HealthCare is seeking to develop a 165-bed Residential Aged Care Facility (RACF) on a vacant site located at 59-67 Karne Street North, Narwee, NSW. Given the size of the proposed residential care facility, its Capital Investment Value (CIV) will be in excess of \$30 million. Therefore, with the commencement of SEPP (Housing) 2021 on 26 November 2021 a State Significant Development (SSD) planning pathway is being pursued for the proposed development.

This report provides an economic impact assessment of the proposed development, including an assessment of the supply and demand for residential aged care. In addition, it considers the economic benefits of the proposal in terms of investment, employment and strategic land use.

The key findings arising from the research and analysis presented in this report include the following:

- The proposed development is likely to deliver an array of economic benefits to the local community and the state. In particular, the proposed development will deliver a modern and high amenity RACF that responds to the market needs of both residents, and workers living within the local area, and surrounding localities.
- Support the demand for aged care living by providing modern and high quality RACF that will enable local residents to receive care while staying with local community and close to family, and social and cultural networks.
- Assist in meeting a forecast under supply of beds by 2031 (in both the catchment and the Canterbury Bankstown LGA) and contribute to choice in aged care providers and minimising wait times for the placement for senior residents requiring aged care services. The project will assist in providing supply to address long-term undersupply.
- Improved health and wellbeing associated with the delivery of an RACF. This will increase access to aged care for those in need, particularly for those who do not yet require full time care but will benefit from access to OpalCare's services in the future. This is in alignment with state and local policy objectives for 'ageing in place'.
- Improve quality of residential aged care supply through the development of a modern RACF.
- Support the provision of a range of new employment opportunities within a within the aged care sector in an accessible location and within a modern RACF that meets the contemporary needs of aged care residents and is well placed to support the evolving needs of residents.
- Increase the provision of high quality residential aged care beds within the local area which is currently characterised by dated stock that offers low levels of resident amenity.
- Greater utilisation of a vacant and underutilised site.
- Align with the objectives of State and Local Government which seek to provide the following:
 - Support a 30-minute city by providing housing, jobs and critical social infrastructure within proximity to public transport
 - Deliver additional housing supply in the local area to support continued population growth of this region

Introduction

Background

Opal HealthCare is seeking to develop a 165-bed Residential Aged Care Facility (RACF) on a vacant site located at 59-67 Karne Street North, Narwee, NSW. Given the size of the proposed residential care facility, its Capital Investment Value (CIV) will be in excess of \$30 million. Therefore, with the commencement of SEPP (Housing) 2021 on 26 November 2021 a State Significant Development (SSD) planning pathway is being pursued for the proposed development.

This report provides an economic impact assessment of the proposed development, including an assessment of the supply and demand for residential aged care. In addition, it considers the economic benefits of the proposal in terms of investment, employment and strategic land use.

Ethos Urban are also preparing a separate planning report and a Social Impact Assessment (SIA), all of which will form a suite of documents associated with the Environmental Impact Statement (EIS) that will be submitted to the Department of Planning and Environment (DPE) pursuant to Part 4 of the Environmental Planning and Assessment Act 1979 (EP&A Act) in support of an application for State Significant Development (SSD).

This Report

This report contains the following chapters:

- Chapter 1: Subject Site and Proposed Redevelopment:** Provides commentary on the subject site context including an overview of the proposed development and a review of the suitability of the site for development in the context of what is occurring in the surrounding area.
- Chapter 2: Population and Demographic Analysis:** Considers the existing and forecast demographic and socio-economic characteristics of the local population, particularly as they relate to residential aged care demand.
- Chapter 3: Aged Care Supply and Demand Analysis:** Identifies the opportunity for an increase in residential aged care at the subject site having regard for the forecast of demand for residential aged care, and an assessment of the current supply in the region.
- Chapter 4: Economic Impacts:** Identifies and provides commentary on the economic impacts of the proposed redevelopment, including estimates of construction and ongoing employment, support for nearby businesses, and capital investment.
- Chapter 5: Conclusion:** Provides a summary of the key conclusions arising from the research and analysis presented in the report.

1.0 Subject Site Context and Proposed Development

This Chapter provides an overview of the Subject Site and its existing use, the proposed redevelopment, and the surrounding land use context.

1.1 Subject Site Description

The Subject Site is located at 59- 67 Karne Street North, Narwee and is approximately 7,150m² in size (see **Figure 1**). The Subject Site has a street frontage to Karne St North to the west. Richard Podmore dog park adjoins the site's southern interface, with which it is immediately accessible.

Until 2016, the Subject Site was used as single dwelling and a seniors housing development comprising a Residential Aged Care Facility (RACF) and a respite care facility operated by BUPA. Currently, the Subject Site is vacant and fenced off along all boundaries.

Located in Canterbury-Bankstown Council, the Subject Site is approximately 15km to the south-west of Sydney CBD and around 4km to the south-east of Bankstown CBD.

The suburb Narwee is physically divided by the M5 South-Western Motorway, which runs east-west through the suburb. The Subject Site is located in the northern section of Narwee and adjacent to the motorway.

Low density residential is the primarily land use surrounding the Subject Site. There is some open space to the immediate north-west of the Subject Site, and to the south running along the South Western Motorway.

Figure 1 Subject site



Source: Group GSA

1.2 Surrounding Context

The Subject Site is generally surrounded by residential development comprising single detached dwellings and multi dwelling housing. A number of recreational areas are also located near the proposed development.

North

To the immediate north of the Subject Site are low density detached single dwellings accessible from Grove Avenue, being single or two-storey in height. Similar forms of development are located further beyond. Two neighbourhood shops are 300m to the north and consist of a restaurant and a hair and beauty salon at the corner of Karne Street North and Shorter Avenue.

East

To the immediate east of the Subject Site is low to medium residential development accessed from Grove Avenue. South-east of the Subject Site is a landscaped area providing a natural buffer between residential development and the M5 South Western Motorway further to the south.

South

To the south of the Subject Site is the Richard Podmore Dog Park. Further south is the M5 South Western Motorway, with the acoustic wall preventing any views and access further to the south.

West

To the west of the Subject Site is low density residential development. Bennett Park is a community park including sport fields and facilities to the north-west. The Narwee industrial area is located further west which includes industrial warehouses and manufacturing.

1.3 Regional Context

Within the broader region, the Subject Site is located within the inner south-west of metropolitan Sydney.

A number of major arterial roads and transport infrastructure are in proximity to the Subject Site, including the M5 South Western Motorway directly to the south and providing east-west connectivity across south-western Sydney. King Georges Road is located to the east of the Subject Site and provides north-south connectivity, and Canterbury Road to the north provides additional east-west connectivity.

Narwee railway station is the closest train station to the Subject Site at approximately 700m (direct line) south-east and at estimated 15-minute walking distance from the Subject Site. This station forms part of the T8 Airport and South Line connecting the local area to Sydney CBD, the airport, and south-west Sydney. The T3 Bankstown Line is the secondary major line in proximity to the Subject Site with Punchbowl Station being the closest station (2km direct line) to the Subject Site. This train line is currently being upgraded and converted into a metro line expected to be completed by 2024.

There is a significant provision of hospitals and health care centres and pharmacies within proximity of the Subject Site. Canterbury Hospital in Campsie is a major metropolitan hospital located 4km to the north-east of the Subject Site, and Bankstown-Lidcombe Hospital is located 4km to the west of the Subject Site and is a major hospital servicing South West Sydney. St George Hospital in Kogarah is located some 7km to the south-east. Health care providers including health care centres and pharmacies are concentrated around key centres within the regional area, with a cluster within Bankstown, Campsie, Hurstville and Kogarah. Three medical centres are located within Narwee.

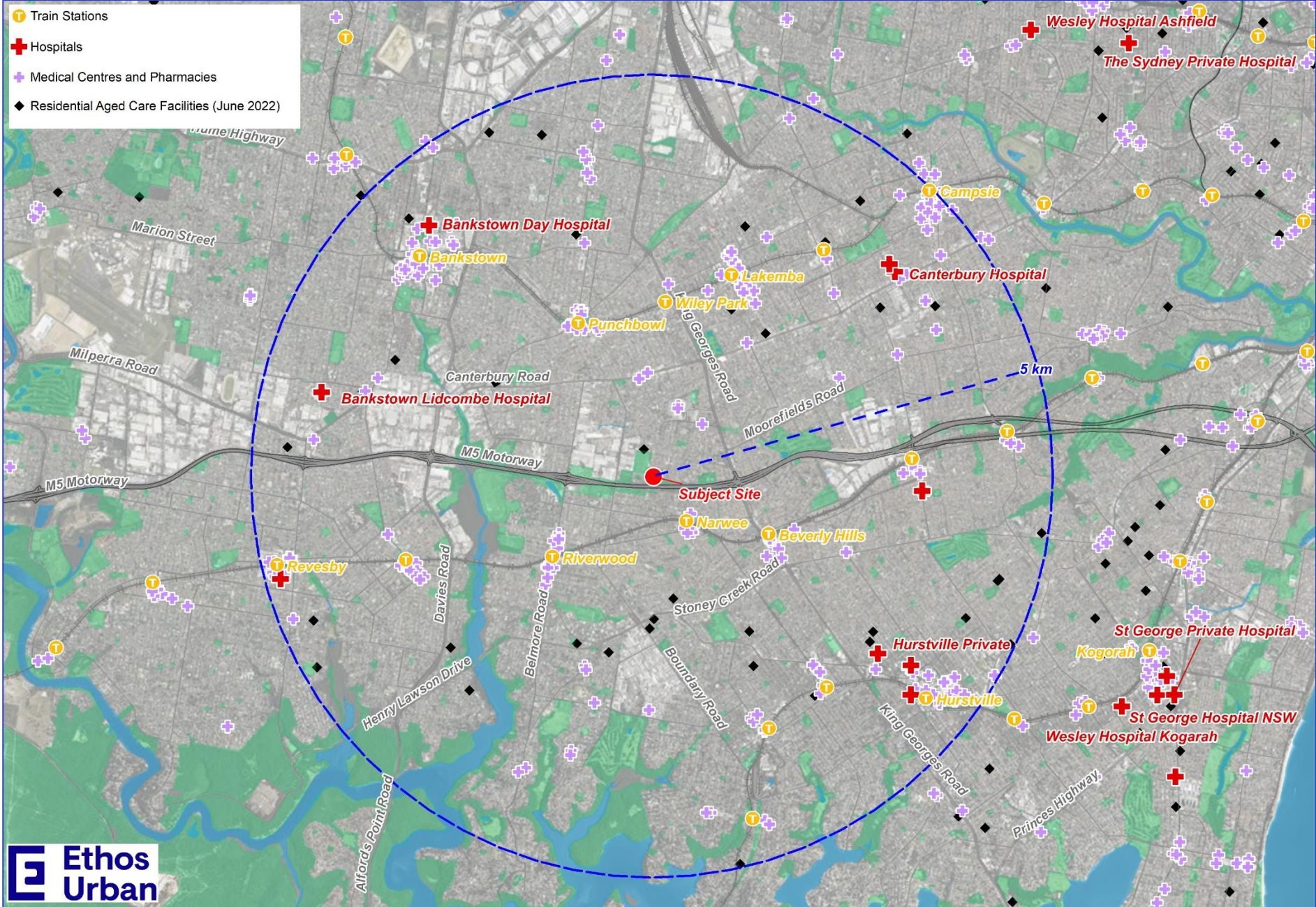
Roselands is a major regional shopping centre located just over 800m to the north-east of the Subject Site. The centre contains five major tenancies, and around 120 speciality stores. In addition, a range of retail facilities, are located around key train centres including at Narwee.

A diverse range of social infrastructure including religious buildings and schools is also located within the local area.

Overall, the local area is a vibrant region with a highly diverse community, and a range of built forms and land uses. Provision of health facilities, retail facilities, and social infrastructure is likely to create a strong sense of local identity and desire for many older residents to live and migrate into local area.

A map illustrating the Subject Site's location and context is provided below in **Figure 2**.

Figure 2 Regional Context



Source: Mapinfo; Bing Maps; Ethos Urban,

1.4 Strategic Context

The proposed development will support and deliver on a range of strategic plans and policies for the local area and region. There are several strategic policies that have been adopted and released that are of relevance to the economic contribution of any future development at the Subject Site. Key themes of these policies have been summarised in

Table 1. The following documents have been reviewed to inform this analysis:

- Ageing Well in NSW: Seniors Strategy (NSW Government, 2021)
- Draft Community Strategic Plan (City of Canterbury Bankstown, 2022)
- Local Strategic Planning Statement (City of Canterbury Bankstown, 2016)
- NSW Housing Strategy (NSW DPE, 2021)
- NSW State Environmental Planning Policy (Housing) 2021
- South District Plan (Greater Sydney Commission, 2018)
- Canterbury Bankstown Housing Strategy (City of Canterbury Bankstown, 2020).

Overall, strategic priorities identify that the region's population is growing, and ageing rapidly, and a range of housing options and housing choice should be provided.

Table 1 Strategic policy drivers

Theme	Implications for the proposed development	Relevant documents
Population trends	<ul style="list-style-type: none"> • Canterbury-Bankstown's population is growing at a significant pace, with an expectation of 500,000 residents by 2036. Council recognises the need to plan for a 'mature-aged community' in light of a growing proportion of residents aged over 65 years. • Canterbury Bankstown LGA is home to an extremely diverse population, with 44% born overseas and 60% speaking a language other than English. The needs of CALD (Culturally and Linguistically Diverse) communities will need to be considered in infrastructure and service planning. • The South District is forecast to experience a 57% increase in residents aged 65-84 and an 85% increase in residents aged over 85 by 2036. 	<ul style="list-style-type: none"> • Local Strategic Planning Statement (City of Canterbury Bankstown, 2016) • Draft Community Strategic Plan (City of Canterbury Bankstown, 2022) • South District Plan (Greater Sydney Commission, 2018)
Priorities for senior's housing	<ul style="list-style-type: none"> • It is a state priority to allow people to remain in their communities as they age, in environments which suit their needs and enable mobility. In order to achieve this, housing needs to be delivered in the right places, at the right time, be easily adaptable, resilient to change. • The 2021 NSW Housing SEPP legislates that senior's housing should "have obvious and safe pedestrian links from the Subject Site that provide access to transport services or local facilities" (Division 6, 104). • In light of the South District's ageing population, the Greater Sydney Commission advocates for universal design of both public and private places. Other priorities include enhancing the walkability of neighbourhoods and the '30-minute city' objective. • "The population of Canterbury Bankstown is ageing, and residents will require smaller and more accessible dwellings within their neighbourhood to support the ageing-in-place process" (Housing Strategy, p. 92). • "Accessible and adaptable housing enables people with a disability and older people to live with independence and dignity, and age in place. Housing that is universally designed is more versatile and can better meet the changing needs of occupants, including families, over their lifetimes. Canterbury Bankstown Council could require larger-scale residential developments to incorporate adaptable dwellings and satisfy the NSW Apartment Design Guide benchmark universal design feature" (Housing Strategy, pp. 106-107). 	<ul style="list-style-type: none"> • NSW Housing Strategy (NSW DPE, 2021) • NSW State Environmental Planning Policy (Housing) 2021 • Ageing Well in NSW: Seniors Strategy (NSW Government, 2021) • South District Plan (Greater Sydney Commission, 2018) • Canterbury Bankstown Housing Strategy (City of Canterbury Bankstown, 2020)
Housing choice and diversity	<ul style="list-style-type: none"> • The NSW Government recognises a 'housing spectrum' which encompasses diverse housing experiences, e.g., homelessness, home ownership, living with old age/ disability. It is acknowledged that people often move back and forth along the spectrum throughout their lives. • One of the four pillars of housing in NSW, identified by the state Housing Strategy, is diversity. This pillar sets an objective of delivering diverse housing which meets varied and changing needs. • It is a local priority to "provide housing choice to suit each life stage through a range of housing typologies, sizes and tenures" (LSPS, p. 72) 	<ul style="list-style-type: none"> • NSW Housing Strategy (NSW DPE, 2021) • Local Strategic Planning Statement (City of Canterbury Bankstown, 2016)

Source: Ethos Urban

1.5 Proposed Development

Opal HealthCare is seeking to develop a 165-bed residential care facility to cater for High Care residents with a dedicated Memory Care Neighbourhood (MCN) of up to 3 x 15 residential neighbourhoods on the ground floor, and an overall building height of 2 storeys plus basement parking. Key features of the proposal include:

- 90 beds in large single rooms and 74 bed in standard single rooms, all with ensuites with patios or balconies aside from the MCN facilities.
- Various public and communal areas to service the care facility, plus a social hub, children's playground, music rooms, outdoor dining and gardens.
- 31 parking bays in basement and 1 at porte cochere, as well as an ambulance bay and loading dock.

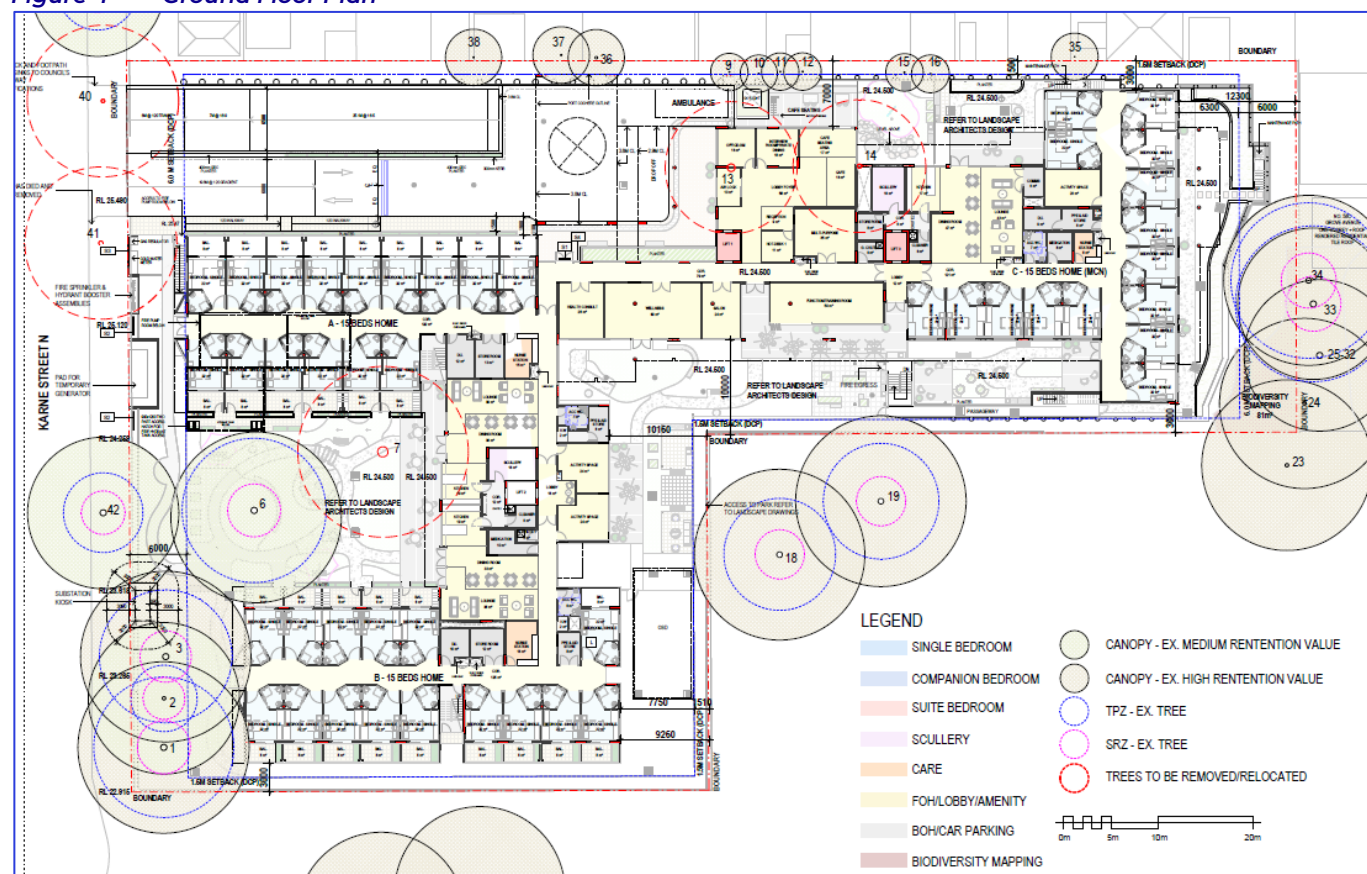
Selected images of the proposal are provided in **Figure 3** and **Figure 4**.

Figure 3 *Proposed Development*



Source: Group GSA

Figure 4 Ground Floor Plan



Source: Group GSA

1.6 Suitability of the Subject Site for development

The Subject Site is part of a well-established urban area which provides a range of facilities and services located nearby including retail/town centre services, health and entertainment/recreation facilities. Suitability of the Subject Site as a location for a residential aged care facility is discussed below:

- **Established community.** Narwee and the inner south-west is an established region of metropolitan Sydney with a diverse number of local communities. The proposed RACF will provide care services (both long term and short-term respite care) for older residents of these communities while maintaining connection to the local area including family, community and social groups.
- **Vacant and underutilised site.** Since 2016, the Subject Site has remained vacant and fenced off to the general public. Previously the Subject Site was occupied by single dwellings and a seniors housing development comprising a RACF and a respite care facility operated by BUPA.
- **Accessibility.** The Subject Site is accessible to the region via major arterial roads including South-Western Motorway, King Georges Rd and Canterbury Rd.
- **Site size.** The Subject Site is approximately 7,149m² in size which is broadly inline with typical RACF site sizes.
- **Health facilities.** Multiple hospitals are located within 5km of the Subject Site including Bankstown-Lidcombe Hospital. In addition, there are multiple health centres within the local area including at Narwee, Bankstown, Lakemba, Beverly Hills and Campsie.
- **Access to aged care workforce.** The Subject Site has is accessible to an aged care workforce within Greater Sydney. This is an important consideration as work force shortages are likely to remain within the aged care sector potentially impacting the operation and viability of RACFs that are not well located and do not have good access to residential aged care workforce.
- **High share of family households in local area:** The local area and Canterbury Bankstown LGA have a slightly higher share of family households than the balance of Greater Sydney. The proposed RACF provides an opportunity for older family members to receive care services while living close to their family and extended family.

Having regard for the above, the Subject Site presents an ideal location for a RACF what will connect future residents to nearby families at a location that is reasonably accessible. From a policy perspective, the proposed development will enable greater utilisation of a site that is currently vacant.

2.0 Population and Demographic Analysis

This Chapter provides an analysis of the existing and forecast demographic and socio-economic characteristics of the local population, particularly as they relate to aged care demand.

2.1 Catchment Definition

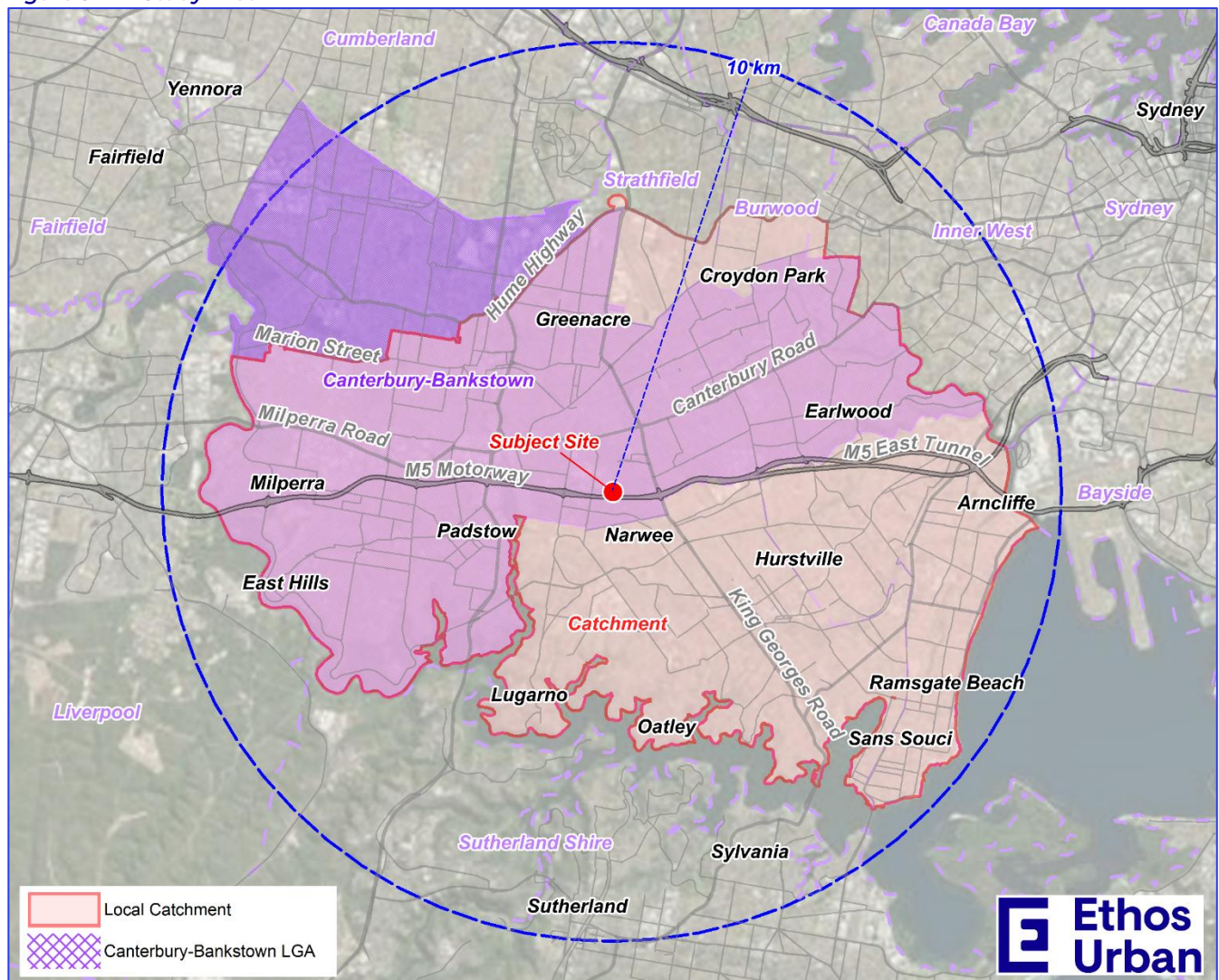
Aged care residents typically seek aged care accommodation within their own communities, and this is typically reflected in a high proportion of residents originating from within 10km.

Having regard for a desire to retire within the same community and the geographic features of the surrounding area including the Inner West to the north of the Subject Site and Georges River to the south, it is reasonable to expect a large proportion of future residents at the Narwee Parklands Care Community will originate from the inner west and Western Suburbs.

On this basis, a local **catchment** has been identified for the purpose of assessing the demand and supply of aged care accommodation which reflects the boundaries of the study area and a 10km radius from the site as shown in **Figure 5**. This Study Area is considered of high relevance in assessing the needs for aged care in the regional economic context, as well as strategic context of the proposed development.

In addition, an assessment of the demand and supply in the **City of Canterbury-Bankstown** is also provided in this report.

Figure 5 Study Area



Source: Ethos Urban

2.2 Community Profile: Resident Demographic Characteristics

Based on the ABS Census of Population and Housing 2021, the key demographic characteristics of the population in the Study Area and Canterbury-Bankstown LGA are outlined in **Table 2**.

The key demographic characteristic of the catchment population are summarised as:

- **Household Income.** Households within the catchment typically had a lower household income, with the median household income (-14.4%) below the Greater Sydney benchmark.
- **Age Structure.** Comparable age structure to the Greater Sydney benchmark with a median age of 37.5 years compared to the benchmark of 37.3 years. Residents aged 70+ years accounted for 11.1% of the population, which was above the Greater Sydney benchmark (10.3%).
- **Country of Birth.** 53.2% of residents within the catchment were born in Australia. This share is below the Greater Sydney benchmark, and slightly below the share in Canterbury Bankstown LGA.
- **Household Composition.** Majority of households were family households (73.4%), which is slightly above the Greater Sydney benchmark (72.6%). There was a slightly smaller share of lone person households (22.3%) to the Greater Sydney benchmark, while the share of group households within the catchment was comparable to Greater Sydney benchmark.
- **Dwelling Structure.** Just under half of dwellings were separate houses (49.3%) which was below the Greater Sydney benchmark (56.1%). Flat, units and apartments comprised second largest share of dwelling types (35.7%), followed by semi-detached dwellings (14.5%). These shares were larger than the Greater Sydney benchmark indicating that residents are more likely to live in medium and high-density households.
- **Tenure Type.** A higher share of dwellings were rented (37.2%) compared to the Greater Sydney benchmark (36.1%).
- **Need for Assistance.** 6.5% of residents are in need of assistance which is slightly above the Greater Sydney benchmark (5.5%) but below the share in Canterbury-Bankstown LGA (7.3%). This variable measures the

Overall, residents are more likely to be aged over 70+ years within the catchment, and in need of assistance compared to the Greater Sydney benchmark. Households typically have a lower income and are comprised of family households in medium and high-density dwellings that are being rented. These demographic variables indicate that there is likely to be relatively higher levels of demand for residential aged care compared to the balance of Greater Sydney.

A review of key changes between the 2016 and 2021 census highlights the following trends of relevance (see **Figure 6**):

- **Household Incomes.** Household incomes increasing but slightly below Greater Sydney benchmark.
- **Age structure.** Population is ageing and at a faster pace than Greater Sydney. In 2016, the median age was 35.0 years and the median has increased by +2.5 years. By comparison, the median age for Greater Sydney increased by +1.3 years. Contributing to this older population is a reduction in the share of residents aged below 34 years, and an increase in residents aged 60 years and above.
- **Household composition.** Household sizes have declined slightly between 2016 and 2021. This has primarily been driven by a decrease in the share of couple family with children, and an increase in lone person households.
- **Dwelling Tenure.** Rates of ownership have declined with slightly lower share of dwellings owned outright, which has been slightly offset by an increase in the share of dwellings being rented.

Overall, trends between the 2016 to 2021 Census indicate that the population is ageing, and households are becoming smaller. This highlights that demographic drivers and trends underway indicate that the local population would associate strongly with a greater options for seniors living, including residential age care.

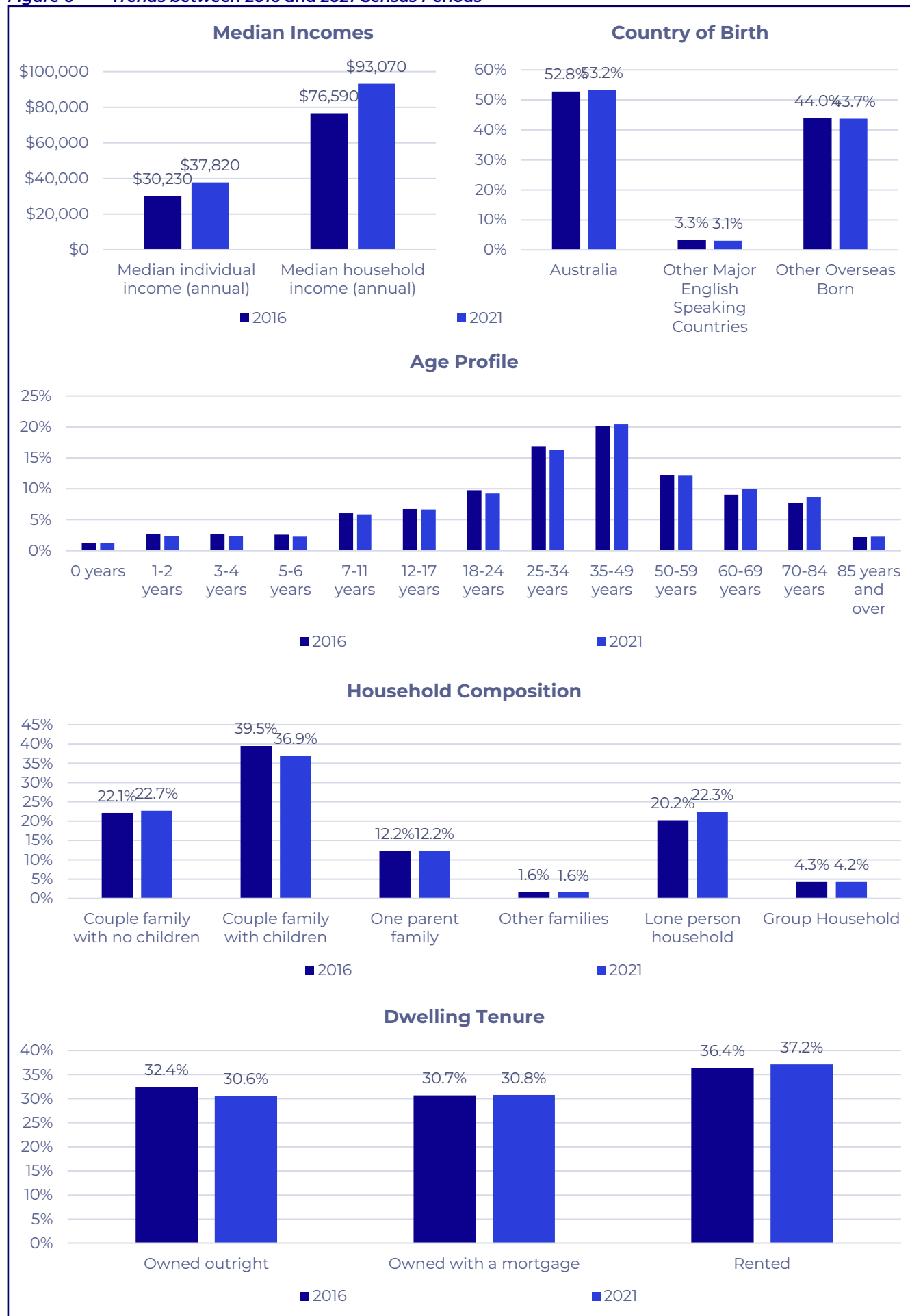
Table 2 Residential Demographic Profile, 2021

Category	Catchment	Canterbury Bankstown LGA	Greater Sydney
Income			
Median household income (annual)	\$93,070	\$82,040	\$108,750
<i>Variation from Greater Sydney median</i>	-14.4%	-24.6%	<i>n.a.</i>
Age Structure			
0 years	1.2%	1.3%	1.2%
1-2 years	2.4%	2.7%	2.4%
3-4 years	2.4%	2.7%	2.4%
5-6 years	2.4%	2.7%	2.5%
7-11 years	5.9%	6.6%	6.3%
12-17 years	6.7%	7.6%	7.1%
18-24 years	9.2%	9.2%	8.8%
25-34 years	16.3%	15.1%	15.6%
35-49 years	20.4%	20.1%	21.7%
50-59 years	12.2%	12.0%	12.0%
60-69 years	10.0%	9.7%	9.7%
70-84 years	8.7%	8.0%	8.4%
85 years and over	2.4%	2.2%	1.9%
Median Age (years)	37.5	36.5	37.3
Country of Birth			
Australia	53.2%	53.7%	61.1%
Other Overseas Born	43.7%	43.9%	31.8%
<i>% speak English only at home</i>	40.5%	36.7%	61.0%
Household Composition			
<i>Couple family with no children</i>	22.7%	19.8%	24.5%
<i>Couple family with children</i>	36.9%	39.7%	36.1%
Couple family - Total	59.6%	59.5%	60.5%
One parent family	12.2%	14.1%	11.0%
Other families	1.6%	1.5%	1.1%
Family Households - Total	73.4%	75.1%	72.6%
Lone person household	22.3%	21.3%	23.3%
Group Household	4.2%	3.6%	4.1%
Dwelling Structure (Occupied Private Dwellings)			
Separate house	49.3%	55.4%	56.1%
Semi-detached, row or terrace house, townhouse etc.	14.5%	15.7%	12.8%
Flat, unit or apartment	35.7%	28.5%	30.7%
Other dwelling	0.6%	0.4%	0.4%
<i>Occupancy rate</i>	92.4%	92.7%	91.8%
Average household size	2.8	3.0	2.7
Tenure Type (Occupied Private Dwellings)			
Owned outright	30.6%	29.3%	28.3%
Owned with a mortgage	30.8%	30.7%	34.0%
Rented	37.2%	38.5%	36.1%
Need for Assistance			
With Need for Assistance	6.5%	7.3%	5.5%

Source: Australian Bureau of Statistics (ABS) 2021 Census of Population and Housing

Note: interpretation of small area data from the 2021 ABS Census should consider potential outcomes from the COVID-19 pandemic

Figure 6 Trends between 2016 and 2021 Census Periods



2.3 Population Trends and Forecast

Population forecasts for the Catchment and Canterbury Bankstown LGA population, including the older age cohort of 70 years plus are summarised in **Table 3** Forecast Population of Study Area Residents Aged 70 Years and Over, 2011-2036. Population forecasts have been prepared with reference to ABS Estimated Resident population data and official state government forecasts (NSW DPE Population Projections 2022).

In 2022, an estimated 587,170 persons lived within the catchment and this is forecast to increase by +68,460 residents by 2036.

An examination of age projections derived from DPE projections and from the latest ABS 2021 Census indicates that in 2022, there were an estimated 68,120 residents aged 70+ years. This figure is forecast to increase significantly to approximately 104,280 persons over the next 14 years to 2036. This represents an average annual growth of 2,580 persons at an average of 1.5% increase per annum, well above the projected growth rate for the entire population of 0.8% per annum. Additionally, there are 40,290 persons located within the Canterbury-Bankstown LGA that are aged 70 years or over, with expected growth of +23,880 persons by 2036.

Over the 14-year period to 2036, the population aged 70 years and over in the catchment is forecast to increase by a total of approximately +36,160 persons, accounting for 53% of total population growth of +68,460 persons.

Over the period 2022 to 2036, the share of persons aged 70 years and over is projected to increase from 11.6% in 2022 to 15.9% by 2036, illustrating an increase in ageing of the catchment population. These residents will seek a mix of senior housing options including aged care accommodation dependent upon their own circumstances and preferences. These trends are comparable to those within the Canterbury-Bankstown LGA.

Overall, the population of the catchment is projected to become older, a trend that is consistent across Australia.

Table 3 Forecast Population of Study Area Residents Aged 70 Years and Over, 2011-2036

Total Population	2016	2022	2025	2026	2031	2036
Population (no.)						
Catchment	585,710	587,170	594,110	599,220	628,730	655,630
Canterbury Bankstown LGA	362,040	373,230	380,970	384,140	401,340	417,370
Average Annual Growth (no.)		2016 - 2022	2022 - 2025	2025 - 2026	2026 - 2031	2031 - 2036
Catchment		+240	+2,310	+5,110	+5,900	+5,380
Canterbury Bankstown LGA		+1,870	+2,580	+3,170	+3,440	+3,210
Average Annual Growth Rate (%)		2016 - 2022	2022 - 2025	2025 - 2026	2026 - 2031	2031 - 2036
Catchment		0.0%	0.4%	0.9%	1.0%	0.8%
Canterbury Bankstown LGA		0.5%	0.7%	0.8%	0.9%	0.8%
Populated aged 70+ years	2016	2022	2025	2026	2031	2036
Share of total population (%)						
Catchment	10.1%	11.6%	12.7%	13.0%	14.5%	15.9%
Canterbury Bankstown LGA	9.5%	10.8%	11.8%	12.1%	13.9%	15.4%
Population aged 70+ years (no.)						
Catchment	59,010	68,120	75,200	77,760	91,170	104,280
Canterbury Bankstown LGA	34,440	40,290	44,940	46,650	55,640	64,170
Average Annual Growth (no.)		2016 - 2022	2022 - 2025	2025 - 2026	2026 - 2031	2031 - 2036
Catchment		+1,520	+2,360	+2,560	+2,680	+2,620
Canterbury Bankstown LGA		+980	+1,550	+1,710	+1,800	+1,710

Source: NSW DPE 2022 Population Projections, ABS, Ethos Urban

3.0 Aged Care Supply and Demand Analysis

The proposed development seeks to provide 165 residential aged care beds at the Subject Site. This Chapter identifies the opportunity for an increased amount of residential aged care at the Subject Site having regard for the forecast of demand for residential aged care, and an assessment of the current supply in the region.

3.1 Aged Care Supply in the Catchment

According to Department of Health information (2022) and a review of residential aged care development in the catchment over the past year, a total of 60 RACFs are located in the catchment. In total, these RACFs comprise a total of 5,348 government-funded residential aged care places.

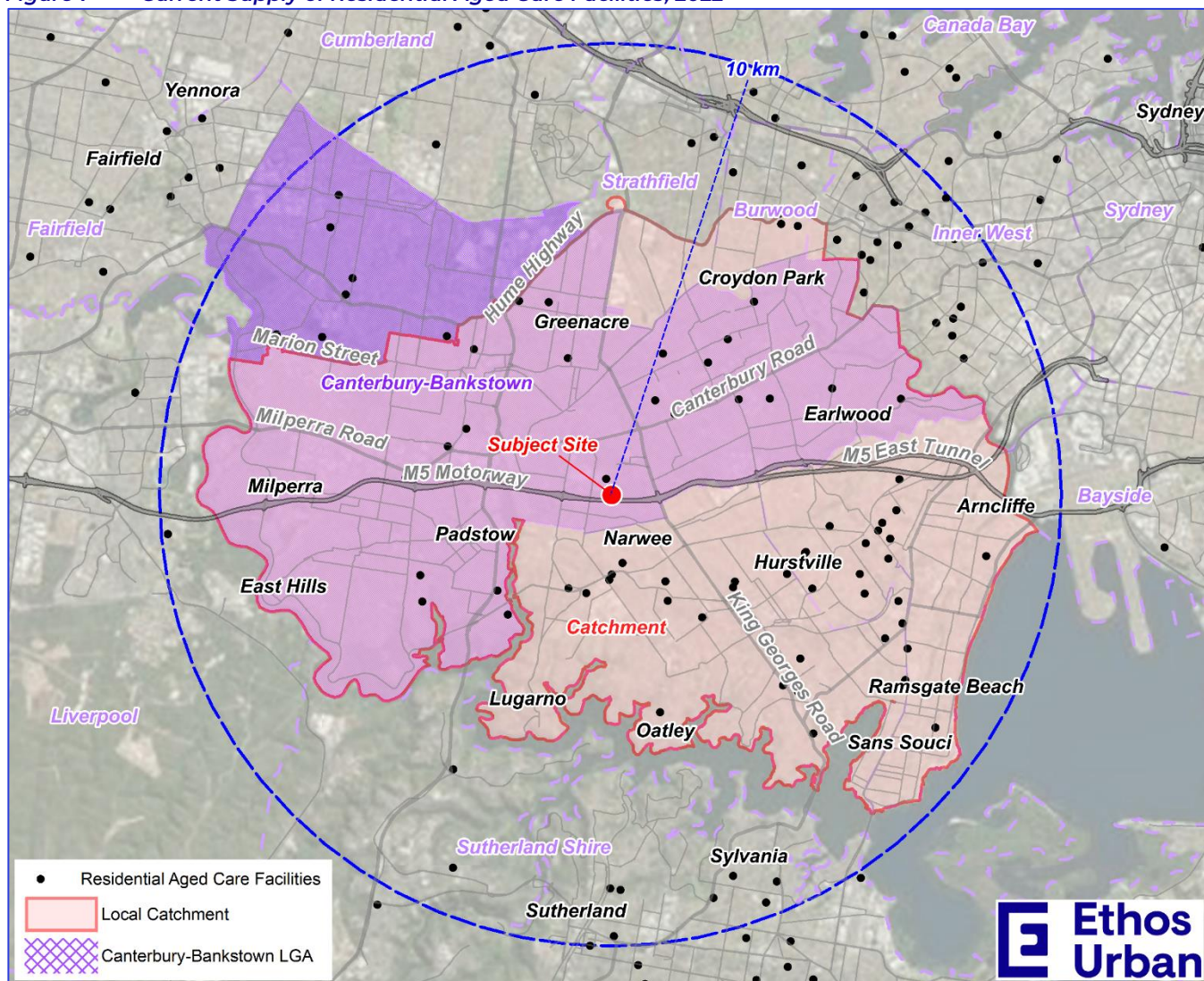
A key observation of existing RACFs in the catchment is that many of these existing facilities are very dated and ageing. In this sense, it is likely that many facilities are not inline with modern expectations surroundings quality and service of RACFs.

A summary of the RACFs located in the catchment is provided in **Table 9** in **Appendix A**, while **Figure 7** shows the location of each facility. In addition to aged care facilities in the catchment, a number of facilities are also located just beyond the catchment.

Successive Commonwealth Governments have been working towards providing 78 residential aged care beds per 1,000 persons aged 70 years or over. In this context, as of 2022, the 5,348 residential aged care beds in the catchment represents a provision of 79 residential aged care beds per 1,000 residents aged 70 years or over. This would indicate the current supply of residential aged care in the catchment is sufficient.

In addition to the aged care facilities within the catchment, an analysis has been undertaken for those located within the Canterbury-Bankstown LGA. Within Canterbury-Bankstown LGA, a total of 29 RACFS comprising 2,881 government funded residential aged care places exists (see **Appendix B**).

Figure 7 Current Supply of Residential Aged Care Facilities, 2022



Source: Mapinfo; BingMaps; Department of Health information (2022); Ethos Urban

3.2 Residential Aged Care Development Pipeline

A review of the Cordell Connect database and individual aged care operator websites, indicates a potential pipeline of almost an additional 760 residential aged care beds, as shown in **Table 4**. This estimate includes the proposed developed at the subject site.

Many of these projects are at different stages of the planning and development process. In this sense, timing of completion and the total number of residential aged care beds in the pipeline will likely fluctuate from these estimates. Furthermore, while many of these projects are expected to be completed before 2031, other projects may also commence over this time period.

Table 4 *Indicative Aged Care Pipeline in Catchment, 2023 to 2031*

Project	Address	Suburb	Estimated Beds
St Basils Bexley Residential Aged Care Facility	62-82 Harrow Road	Bexley	170
Leigh Place Aged Care	12-18 Leigh Avenue Roselands & 34 Skinner Avenue)	Riverwood	34
Milperra Village Integrated Aged Care Facility	27 Bullecourt Avenue	Milperra	103
Carino Care Rockdale	22 Woodford Rd	Rockdale	-25*
Henry Street Residential Care Facility	13-23 Henry Street	Punchbowl	80
Laycock Road Aged Care Facility & Respite Centre	2 Laycock Road	Penshurst	TBD
119 Barton Street Aged Care Facility	119 Barton Street	Monterey	116
Rosemore Aged Care Belmore	18-22 Kingsgrove Road & 7-11 Westwood Avenue	Belmore	114
Uniting Yagoona Seniors Housing Development	6-10 Church Road	Yagoona	TBD
Lahc - Hurstville Senior Housing Development	Hurstville	Hurstville	TBD
Narwee Parklands Care Community	59-67 Karne Street North	Narwee	165
Total			760

Source: Cordell; Operator Websites, LGA development application trackers; Ethos Urban

Notes: * project description indicates a reduction of beds from current 75 beds to 50 beds.

3.3 Forecast Aged Care Demand

Forecast Aged Care Demand in the Catchment

Successive Commonwealth Governments have been working towards providing 78 residential aged care beds per 1,000 persons aged 70 years or over.

While the current provision of residential aged care beds of 79 beds per 1,000 residents aged 70 years or over is slightly above national planning benchmarks, significant population growth in the older age cohort of 70 plus years is forecast over the coming decades which will contribute to the need for additional residential aged care beds.

The population in the catchment aged 70 years or over is forecast to increase from 68,120 persons in 2022 to approximately 91,170 persons in 2031, with an approximate growth of +23,050 persons aged 70+ years. Assuming the national planning benchmark of 78 residential aged care beds remains, demand for a total of 7,110 aged care beds in the catchment will eventuate by 2031.

Having regard for the potential future pipeline of 760 residential aged care beds in the catchment (see **Table 4**), including the proposed 165 bed development at the subject site, there will still be demand for an additional 1,000 beds by 2031. While some of this unmet demand will be met by modifications to existing projects and RACFs, as well as commencements of new projects, this shortfall represents a significant long-term under provisioning of aged care beds. In addition, this outlook does not take into account RACFs that may be taken offline due to renewal and refurbishments.

In this regard, the proposed development would assist in meeting a forecast under supply of beds by 2031 in the catchment and contribute to choice in aged care providers and minimising wait times for the placement for senior residents requiring aged care services.

Table 5 Forecast Demand for Residential Age Care in the Catchment, 2022 – 2031

Category	2022	2026	2031
Population aged 70 years and above	68,120	77,760	91,170
Aged care residential beds per 1,000 persons aged 70 years plus (national planning benchmark)	78	78*	78*
Forecast demand	5,310	6,070	7,110
Without proposed development			
Over-supply/under-supply	30 (over-supply)	-300 (under-supply)	-1,170 (under-supply)
With proposed development			
Over-supply/under-supply	30 (over-supply)	-130 (under-supply)	-1,000 (under-supply)

Source: Cordell, DPE, Ethos Urban

Note: * assumed benchmark based on current national planning benchmark. Figures may not add due to rounding.

Forecast Aged Care Demand in Canterbury-Bankstown

The same analysis of forecast aged care demand was completed for Canterbury-Bankstown LGA. Key findings are as follows (see Table 6 and **Appendix A**):

- The population of residents aged 70+ years in Canterbury-Bankstown forecast to increase by +15,450 residents.
- A shortfall of aged care beds within the LGA of -260 residential aged care beds currently exists.
- Assuming the national planning benchmark of 78 residential aged care beds remains, demand for a total of 4,340 aged care beds in Canterbury-Bankstown will eventuate by 2031.
- Having regard for the potential future pipeline of 650 residential aged care beds, including the proposed 165 bed expansion of the Narwee site, there will still be demand for an additional 810 beds by 2031.
- The proposed development would assist in meeting a forecast under supply of beds by 2031 in Canterbury-Bankstown and contribute to choice in aged care providers and minimising wait times for the placement for senior residents requiring aged care services and who wish to continue to live in Canterbury-Bankstown.

Table 6 Forecast Demand for Residential Age Care in the Canterbury-Bankstown, 2022 – 2031

Category	2022	2026	2031
Population aged 70 years and above	40,290	46,650	55,640
Aged care residential beds per 1,000 persons aged 70 years plus (national planning benchmark)	78	78	78
Forecast demand	3,140	3,640	4,340
Without proposed development			
Over-supply/under-supply	-260 (under-supply)	-330 (under-supply)	-980 (under-supply)
With proposed development			
Over-supply/under-supply	-260 (under-supply)	-500 (under-supply)	-810 (under-supply)

Source: Cordell, DPE, Ethos Urban

Note: * assumed benchmark based on current national planning benchmark. Figures may not add due to rounding.

4.0 Economic Impacts

This Chapter provides an assessment of the economic impacts (including benefits) likely to occur because of the project. Impacts are considered regarding the local and regional area and through the construction and operational phases of the project. An estimate of the jobs likely to be created during the construction and operation phase of the proposed development are provided.

4.1 Demand for the Development

There is growing demand for RACFs and residential aged care beds. Key drivers of demand are as follows:

- **Ageing population.** Australia's population is rapidly ageing and people are living longer. As a result, there is a need to provide a range of senior housing options, facilities and services to accommodate this older population.
- **Care needs.** Current older residents are healthier than earlier generations, increased longevity is driving demand for care services including for dementia, respite care and other complex health issues. The policy of 'ageing in place' responds to the desire of older residents to receive care and support services at home, this leaves RACFs with the focus of providing care services for much older residents in need of high levels of care.

In this context, the proposed development is responding to the need across the community for greater levels of care for older residents. In addition, as noted in **Chapter 3**, many of the existing RACFs within the catchment are not adequate to meet the contemporary needs of seniors living occupiers, and the development of high amenity and modern RACF at the subject site will be well placed to support the evolving needs of residents.

In addition, as outlined in **Chapter 3**, there is a forecast undersupply of residential aged beds of -1,000 aged care beds by 2031. Accordingly, the provision of 165 residential aged care beds at the Subject Site, will therefore not detract from the success or continued operation of any existing or proposed facility in the local area, noting that the proposed aged care beds at the subject site will satisfy just 16.5% of the total gap. Indeed, the proposed development will add much needed supply of residential aged care beds, improving choice and reducing wait times for residents.

As a result, any impact from the aged care uses proposed will be limited and will not directly impact on the ongoing operation or viability of any existing or proposed facilities.

4.2 Economic Benefits

Employment and economic activity

Input-output modelling

Economic impacts associated with the proposed development have been prepared with input-output modelling undertaken with reference and compliance to best-practice guidelines.

Input-output tables are a 'map' of the economy that track the flow of products, services, and payments through the many industries, households, government organisations and foreign transactions that make up the Australian economy.

Every industry requires inputs from many other industries, plus the inputs of workers and machinery and equipment to produce output. Input-output modelling uses averages derived from the ABS Input Output Tables to estimate the impact on all industries when one industry expands its production. The modelling used in this report is based on the 2019/20 ABS National Accounts release.

As with all economic models, input-output models include a number of limitations, which include the following inherent assumptions: unlimited supplies of all resources including labour and capital, prices remaining constant, technology is fixed in all industries, and import shares are fixed.

Having regard for these limitations, the modelling used for the purposes of this assessment applies the **Simple Multiplier effect measure**. The Simple Multiplier effects measure estimates the expansion of other industries required to support the initial (direct) increase in the original industry; and does not include the additional impacts of extra wages and employment income being spent across the economy (spill-over effects).

Use of the **Simple Multiplier effect measure** is in-line with best practice industry standards and reflects a conservative position. Results from the modelling should be interpreted as indicative of the potential impact the project will have on the Australian economy.

The modelling provides estimates of the following economic benefits as a result of the project:

- **Construction Employment** - direct construction job-years supported by construction of the development and indirect job-years supported across all other industries over the construction period.

'Job-years' is defined as the number of full-time equivalent (FTE) jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year. Only applies to construction employment.

- **Ongoing Employment** - direct and indirect FTE jobs supported by the ongoing operation of the project annually.
- **Value Added** - direct and indirect value added generated during the construction and operational phase of the project.

Value Added is defined as the wages, salaries and supplements plus gross operating surplus (income earned by businesses) required in producing the extra output (construction investment and operating output/turnover). This represents the standard measure of economic contribution, that is, the increase in economic activity as measured by gross domestic product (GDP).

Estimates of the economic benefits of the proposed development will be realised across the national economy, given the scale and diversity of the New South Wales economy, a large proportion of these benefits will be realised in the local and regional area. The benefits have been prepared for:

- **Construction Phase:** Economic activity during the construction phase of the project which will be spread across the construction program.
- **Operational Phase:** Ongoing economic activity once the project is completed.

Construction phase

It is estimated the direct capital investment required to realise the proposed development will be in the order of \$50.5 million. This estimate is based on the cost report prepared by Slattery.

Based on a construction cost of around \$50.5 million, the construction phase is expected to directly support employment of 70 job-years and deliver a direct value-add to the economy of \$10.9 million.

When the multipliers are taken into account, total state-wide economy effects over the construction program are forecast to be: employment of 300 - job-years and a total direct value-add to the economy of around \$41.2 million.

Table 7 Construction phase economic benefits (\$2020/21)

	Construction Phase (spread over construction period)		
	Direct	Indirect	Total
Output (\$M)	\$50.5	\$74.3	\$124.9
Employment (job-years)	70	230	300
Value Added (\$M)	\$10.9	\$30.2	\$41.2

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2018/19; ABS, Consumer Price Index

*Job-years: Number of FTE jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year.

Note: Figures rounded

Operational phase

Economic impacts associated with the operation of the RACF once complete and fully occupied, have prepared with reference to relevant industry benchmarks, and include the following:

- **Residential Aged Care:** 1.2 workers for every residential aged care bed, based on benchmarks derived from the *National Aged Care Workforce Census and Survey*, and the 2021 Census.

Based on the above, on completion of the proposed development, the operational phase is expected to deliver the following (direct) benefits: FTE employment of ongoing 200 jobs and direct value-add to the economy of \$24.6 million per annum.

When the multipliers are taken into account, total ongoing economy-wide effects are estimated at: FTE employment of 250 jobs supported and a total direct value-add to the economy of \$30.1 million per annum.

Table 8 *Estimated ongoing employment*

	Operational Phase (annual)		Total
	Direct	Indirect	
Output (\$M)	\$32.1	\$11.7	\$43.8
Employment (FTE)	200	50	250
Value Added (\$M)	\$24.6	\$5.5	\$30.1

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2018/19; ABS, Consumer Price Index

Note: Figures Rounded

5.0 Conclusion

The proposed development is likely to deliver an array of economic benefits to the local community and the state. In particular, the proposed development will deliver a modern and high amenity RACF that responds to the market needs of both residents, and workers living within the local area, and surrounding localities. Other benefits associated with the proposed concept masterplan include:

- Support the demand for aged care living by providing modern and high quality RACF that will enable local residents to receive care while staying with local community and close to family, and social and cultural networks.
- Assist in meeting a forecast under supply of beds by 2031 (in both the catchment and the Canterbury Bankstown LGA) and contribute to choice in aged care providers and minimising wait times for the placement for senior residents requiring aged care services. The project will assist in providing supply to address long-term undersupply.
- Improved health and wellbeing associated with the delivery of an RACF. This will increase access to aged care for those in need, particularly for those who do not yet require full time care but will benefit from access to Opal HealthCare's services in the future. This is in alignment with state and local policy objectives for 'ageing in place'.
- Improve quality of residential aged care supply through the development of a modern RACF.
- Support the provision of a range of new employment opportunities within a within the aged care sector in an accessible location and within a modern RACF that meets the contemporary needs of aged care residents and is well placed to support the evolving needs of residents.
- Increase the provision of high quality residential aged care beds within the local area which is currently characterised by dated stock that offers low levels of resident amenity.
- Greater utilisation of a vacant and underutilised site.
- Align with the objectives of State and Local Government which seek to provide the following:
 - Support a 30-minute city by providing housing, jobs and critical social infrastructure within proximity to public transport
 - Deliver additional housing supply in the local area to support continued population growth of this region

Appendix A Residential Age Care Supply in Catchment

Table 9 Residential Age Care Supply in Catchment, 2022

Age Care Facility	Location	Provider	Residential Places
Macquarie Lodge Aged Care Plus Centre	Arncliffe	The Salvation Army (NSW) Property Trust	130
Catholic Healthcare St Bedes Home	South Hurstville	Catholic Healthcare Limited	44
Catholic Healthcare Bethlehem House	Kogarah	Catholic Healthcare Limited	29
St Basil's Lakemba	Lakemba	St Basil's Homes	195
Catholic Healthcare Holy Spirit Aged Care	Revesby	Catholic Healthcare Limited	50
Yallambee Village	Revesby	Bankstown City Aged Care Ltd	143
Uniting Bruce Sharpe Rockdale	Rockdale	The Uniting Church in Australia Property Trust (NSW)	52
RFBI Lakemba Masonic Village	Lakemba	Royal Freemasons' Benevolent Institution	50
Uniting Banks Lodge Peakhurst	Peakhurst	The Uniting Church in Australia Property Trust (NSW)	114
The Greek Community Home For The Aged	Earlwood	The Greek Orthodox Community of New South Wales Ltd	48
IRT Thomas Holt Sans Souci Gardens	Sans Souci	Illawarra Retirement Trust	38
IRT Peakhurst	Peakhurst	Illawarra Retirement Trust	92
Mary Andrews Retirement Village Hostel	South Hurstville	Anglican Community Services	50
Leigh Place	Roselands	Leigh Place Aged Care	68
Uniting Bankstown	Bankstown	The Uniting Church in Australia Property Trust (NSW)	63
Uniting Roberts Lodge Peakhurst	Peakhurst	The Uniting Church in Australia Property Trust (NSW)	64
St Basil's Kogarah	Kogarah	St Basil's Homes	57
Estia Health Bankstown	Greenacre	Estia Investments Pty Ltd	150
Regis Belmore	Belmore	Regis Aged Care Pty Ltd	72
Blakehurst Aged Care Centre	Blakehurst	Blakehurst Aged Care Services Pty Ltd	107
Clover Lea Nursing Home	Burwood Heights	Fresh Fields Management (NSW) Pty Ltd	64
Fairlea Aged Care @ Penshurst	Penshurst	Oreison Pty Ltd	72
Carino Care at Oatley	Oatley	Carino Care Pty Ltd	73
Menaville Nursing Home	Rockdale	Fresh Fields Aged Care (NSW) - No 1 Pty Ltd	48
Regis Hurstville	Hurstville	Regis Aged Care Pty Ltd	110
Belmore Place Care Community	Lakemba	DPG Services Pty Ltd	52
Fairmont Aged Care Centre	Bexley	Fairmont NSW Pty Ltd	41
Peakhurst Nursing Home	Peakhurst	The Trustees of the Sisters of Our Lady of China	110
Bupa Bexley	Bexley	Bupa Aged Care Australia Pty Ltd	69
Japara Brighton-Le-Sands	Brighton Le Sands	Calvary Aged Care Services Pty Ltd	85
Ferndale Gardens Aged Care Facility	Mortdale	Aspic Holdings Pty Ltd	136
Carino Care at Rockdale	Banksia	Carino Care Pty Ltd	51

Age Care Facility	Location	Provider	Residential Places
Uniting Nunyara Peakhurst	Peakhurst	The Uniting Church in Australia Property Trust (NSW)	78
Shangri-La Nursing Home	Hurstville	Fresh Fields Aged Care (NSW) - No 1 Pty Ltd	53
Bexley Care Centre	Bexley	Fresh Fields Management (NSW) No 2 Pty Ltd	60
Homewood Nursing Home	Bexley	Homewood Care Pty Limited	82
Casa Mia Aged Care Centre	Padstow	Christadelphian Homes Limited	100
St George Aged Care Centre	Bexley	Marlowe Homes Pty Ltd	111
Canterbury Place Care Community	Campsie	DPG Services Pty Ltd	86
Estia Health Bexley Park	Bexley	Estia Investments Pty Ltd	146
Rosemore Aged Care	Belmore	Allity Pty Ltd	78
Beechwood Aged Care	Revesby	Allity Pty Ltd	112
Bupa Greenacre	Greenacre	Bupa Aged Care Australia Pty Ltd	139
Huntingdon Gardens Aged Care Facility	Bexley	Huntingdon Nursing Home Pty Ltd	171
Southhaven Aged Care	Padstow Heights	Christadelphian Homes Limited	141
Chow Cho-Poon Nursing Home	Earlwood	Australian Nursing Home Foundation Limited	46
Estia Health Kogarah	Kogarah	Estia Investments Pty Ltd	72
Scalabrini Village Nursing Home (Bexley)	Bexley	Scalabrini Village Ltd	166
Catholic Healthcare Holy Spirit Croydon	Croydon	Catholic Healthcare Limited	127
Georges Estate Health & Aged Care	Penshurst	Kogarah Health, Aged and Community Care (NSW) Pty Ltd	121
Lucy Chieng Aged Care Centre	Hurstville	Australian Nursing Home Foundation Limited	70
Hixson Gardens Aged Care Facility	Bankstown	Arete Health Care (Bankstown) Pty Ltd	100
Rocky Point Residence	Beverley Park	The Sisters of Our Lady of China Health Care Pty Ltd	77
Homewood Gardens	Bexley	Homewood Care Pty Limited	43
CASS Residential Aged Care Facility	Campsie	Chinese Australian Services Society Limited	63
St Patrick's Green	Kogarah	Greengate Care Pty Ltd	100
Bupa Clemton Park	Clemton Park	Bupa Aged Care Australia Pty Ltd	144
St Charbel's Care Centre	Punchbowl	St Charbel's Care Centre Ltd	75
Bankstown Terrace Care Community	Bankstown	DPG Services Pty Ltd	155
Estia Health Blakehurst	Blakehurst	Estia Investments Pty Ltd	105
Total			5,348

Source: Department of Health (2022), Ethos Urban

Appendix B Supply in Canterbury-Bankstown LGA

Table 10 Residential Age Care Supply in Canterbury-Bankstown, 2022

Age Care Facility	Suburb	Provider	Residential Places
Weeroona Aged Care Plus Centre	Bass Hill	The Salvation Army (NSW) Property Trust	104
St Basil's Lakemba	Lakemba	St Basil's Homes	195
Catholic Healthcare Holy Spirit Aged Care	Revesby	Catholic Healthcare Limited	50
Yallambee Village	Revesby	Bankstown City Aged Care Ltd	143
RFBI Lakemba Masonic Village	Lakemba	Royal Freemasons' Benevolent Institution	50
Chester Hill Village	Chester Hill	Bankstown City Aged Care Ltd	50
The Greek Community Home For The Aged	Earlwood	The Greek Orthodox Community of New South Wales Ltd	48
Abel Tasman Village	Chester Hill	The Abel Tasman Village Association Ltd	91
Leigh Place	Roselands	Leigh Place Aged Care	68
Uniting Bankstown	Bankstown	The Uniting Church in Australia Property Trust (NSW)	63
Estia Health Bankstown	Greenacre	Estia Investments Pty Ltd	150
Regis Belmore	Belmore	Regis Aged Care Pty Ltd	72
Belmore Place Care Community	Lakemba	DPG Services Pty Ltd	52
Bass Hill Aged Care	Bass Hill	Allity Pty Ltd	66
Casa Mia Aged Care Centre	Padstow	Christadelphian Homes Limited	100
Canterbury Place Care Community	Campsie	DPG Services Pty Ltd	86
Rosemore Aged Care	Belmore	Allity Pty Ltd	78
Beechwood Aged Care	Revesby	Allity Pty Ltd	112
Bupa Greenacre	Greenacre	Bupa Aged Care Australia Pty Ltd	139
Southaven Aged Care	Padstow Heights	Christadelphian Homes Limited	141
Chow Cho-Poon Nursing Home	Earlwood	Australian Nursing Home Foundation Limited	46
Gillawarna Village	Georges Hall	Bankstown City Aged Care Ltd	151
Advantaged Care at Georges Manor	Georges Hall	Advantaged Care Pty Ltd	143
Hixson Gardens Aged Care Facility	Bankstown	Arete Health Care (Bankstown) Pty Ltd	100
Bupa Bankstown	Yagoona	Bupa Aged Care Australia Pty Ltd	146
CASS Residential Aged Care Facility	Campsie	Chinese Australian Services Society Limited	63
Bupa Clemton Park	Clemton Park	Bupa Aged Care Australia Pty Ltd	144
St Charbel's Care Centre	Punchbowl	St Charbel's Care Centre Ltd	75
Bankstown Terrace Care Community	Bankstown	DPG Services Pty Ltd	155
Total			2,881

Source: Department of Health (2022), Ethos Urban

Table 11 Indicative Aged Care Pipeline in Bankstown-Canterbury LGA, 2023 to 2031

Project	Address	Suburb	Estimated Beds
Milperra Village Integrated Aged Care Facility	27 Bullecourt Avenue	Milperra	103
Josephine Street Development Site	28-42 Josephine St	Riverwood	TBD
Potts Hill Seniors Living Village	10 Nelson Short Street (Potts Hill	84
Southhaven Aged Care	7 Queensbury Rd	Padstow Heights	0
Advantaged Care At Georges Manor	111 Bellevue Avenue	Georges Hall	
Henry Street Residential Care Facility	13-23 Henry Street	Punchbowl	80
St Basil's Lakemba Training Facility	276-280 Haldon Street	Lakemba	
Rosemore Aged Care Belmore	18-22 Kingsgrove Road & 7-11 Westwood Avenue	Belmore	114
Uniting Yagoona Seniors Housing Development	6-10 Church Road	Yagoona	TBD
Lahc - Chester Hill	-	Chester Hill	TBD
Abel Tasman Village Seniors Housing	222 Waldron Road & 138-140 Campbell Hill Road	Chester Hill	106
Narwee Parklands Care Community	59-67 Karne Street North	Narwee	165
Total			650

Source: Cordell; Operator Websites, Canterbury-Bankstown development application trackers; Ethos Urban