



# **1<sup>st</sup> Stage Needs Analysis Report**

**for**

**The Scottish Hospital Site, Paddington**

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**Wallace Mackinnon & Associates Pty. Limited  
1st Floor, 208 Belmore Road  
RIVERWOOD NSW 2210  
PO Box 780 RIVERWOOD NSW 2210  
Phone: (02) 9584-9800  
Fax: (02) 9584-9833  
E-mail: [info@walmac.com.au](mailto:info@walmac.com.au)**

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## **Needs Analysis Report (Stage 1) for The Scottish Hospital Site, Paddington**

### **1. Scope of Review**

This review is being undertaken as a two stage process. An “at desk” high level review covering statistical and other easily accessible information has been covered in Stage 1 and a report prepared. Stage 2 will cover the more in-depth local review which will involve stakeholder contact and visits, where required. Although the Stage 2 information gathering is running in part parallel with Stage 1, this process is time consuming and dependent upon the time taken by stakeholders to respond and provide the information being sought.

Information gathered during the course of assistance provided to other aged care/accommodation operators and for Government has also been included in the report, where this was considered relevant to the needs analysis.

The agreed scope of the Stage 1 review is as follows:-

- Review of demographic information covering the aged and emerging aged sections of the market in and around the Paddington area. This would include the Woollahra, Waverley, Sydney and Randwick Local Government Areas (LGAs). Although Paddington falls under both Woollahra and Sydney LGAs, the two surrounding LGAs could be important catchment areas.
- A review of the socio economic profile for the relevant local Government areas, particularly focusing on the aged and emerging aged information. This information will include household income data which is a critical consideration.
- House price information, including level of home/unit ownership and current sales values. This is critical information for identifying potential Accommodation Bonds, Entry Contributions and for Extra Service considerations in residential aged care.
- Details of current and proposed residential and community aged care services in the South East Sydney region together with retirement village information in relation to facilities/services within an eight kilometre radius. This will comprise high level information obtained through publications, web sites and Government data. It will include operator details, address and relevant facility/service information. Extended details will be provided following direct contact as part of Stage 2.
- Comparison of existing residential and community aged care operational information to desired ratios of the Australian Department of Health & Ageing. This comparison will provide information on both a regional and LGA basis.
- Details of recent aged care allocations that are not yet operative in the targeted LGAs.

### **2. Background/Site Information**

The Scottish Hospital has been under consideration for redevelopment for some years. It is understood that the Presbyterian Church (NSW) Property Trust is in the process of developing

a master plan for the site to be used as an aged care and accommodation precinct. This will involve rebuilding of the existing residential aged care facility on a different area on the site and the provision of a substantial number of independent living units in probably three separate buildings on the site. The original Scottish Hospital building, which is subject to heritage orders, is to be converted into independent living units.

The site was visited and a proposed sketch plan for the site provided which indicated approximate numbers of 104 residential care and 90 independent living units. It was clear that significant input from people experienced in aged care operation and development had been taken into account in preparing the draft sketch plan. A walk around the site in company with the Deputy Director of Nursing from the aged care facility confirmed that the proposed general layout was appropriate. It was clear that further consideration would be necessary however in relation to the service mix before the master plan could be finalised. Matters to consider include:-

- The number of residential aged care beds proposed for the site.
- The mix of independent living units, in terms of size and numbers.
- The need for Extra Service areas/wings in the residential aged care development.

The critical aspect of this proposed development will be the level of interest free loans (Bonds and Entry Contributions) that will be achievable with the initial resident intake to meet the redevelopment costs of the site.

The site is in Paddington and close to a wide range of services and very close to Sydney Central Business district. There is limited self care and residential aged care available within the Woollahra LGA and particularly in the neighbouring Sydney LGA.

The Department of Health & Ageing have made it clear during the course of recent discussions they are concerned about the lack of residential aged care facilities in the Sydney and neighbouring LGA's. They are aware of the difficulties for organisations embarking on such developments because of the value and restricted availability of land in the areas. There have been no recent allocations to Paddington and its immediate neighbouring suburbs.

If additional residential aged care places were sought for the Scottish Hospital site there is no doubt that the Department of Health & Ageing would be keen to allocate additional places for the redevelopment.

The owner and operation of the site has long term experience in operating residential and community care services and retirement villages, throughout NSW.

### **3. Demographic Information**

The current residents aged care operation on the site caters for a high proportion of financially disadvantaged residents (currently in excess of 40%). Places will continue to be made available to the financially disadvantaged after redevelopment, in accordance with the requirements under the Aged Care Act.

Set out below is a table listing details of the population of the Woollahra, Waverley, Sydney & Randwick LGA's from the past three Census reports. It has been broken down into the age group 65 to 74, 75 to 84 and 85 plus. Also shown is the percentage each group represents of

the total population of the LGA's. Woollahra, Waverley LGA's and the Central and Eastern sections of the Sydney LGA are likely to be the major catchment areas for the site.

Although under the SEPP Seniors Living Planning Instrument aged accommodation relates to people 55 and above, information obtained from a range of "not for profit" retirement village operators around Sydney suggests that very few people enter large retirement villages in the age group 55 to 69. The key market is people 70 and above. To allow for the lead time until the site facilities are operational, the information contained in this section of the report focuses on people 65 and above for consideration of the independent living services.

<b>CENSUS Population Statistics</b>										
<b>LGA</b>		<b>1996</b>			<b>2001</b>			<b>2006</b>		
		<b>Ages</b>			<b>Ages</b>			<b>Ages</b>		
		<b>65 – 74</b>	<b>75 – 84</b>	<b>85+</b>	<b>65 – 74</b>	<b>75 – 84</b>	<b>85+</b>	<b>65 – 74</b>	<b>75 – 84</b>	<b>85+</b>
<b>WOOLLAHRA</b>	<b>No.</b>	3,978	2,864	888	3,453	2,955	1,156	3,539	3,023	1,386
	<b>%</b>	8.03%	5.78%	1.79%	6.95%	5.95%	2.33%	7.06%	6.03%	2.76%
<b>WAVERLEY</b>	<b>No.</b>	4,250	3,152	1,138	3,754	3,143	1,262	3,518	3,047	1,361
	<b>%</b>	6.98%	5.18%	1.87%	6.27%	5.25%	2.11%	5.79%	5.02%	2.24%
<b>SYDNEY</b>	<b>No.</b>	5,439	2,967	963	6,885	4,074	1,248	7,156	4,250	1,410
	<b>%</b>	6.19%	3.38%	1.10%	5.36%	3.17%	0.97%	4.57%	2.71%	0.90%
<b>RANDWICK</b>	<b>No.</b>	8,890	5,304	1,570	7,919	5,839	1,847	7,592	6,189	2,088
	<b>%</b>	7.62%	4.55%	1.35%	6.69%	4.93%	1.56%	6.33%	5.16%	1.74%

Table 1

Important matters to note from the above table are as follows:-

- Although the minimum age point used by the Australian Department of Health & Ageing (DoHA) in assessing need for both residential and community aged care places is 70 and above, this has remained unchanged since the 1990's. There has been considerable debate in recent years about whether 70 should remain the starting point. With improvements in the general health of the older population, and the continuing growth in the average life span of both the males and females, there has been strong suggestions that the starting point for residential and community care considerations should be increased to 75.
- The general breakup of these tables into 65 to 74, 75 to 84 and 85 plus roughly equate to likely independent living unit clientele (65 to 74), likely residential low care and some high care clientele (75 to 84) and mostly residential high care (85 plus).
- All of the LGA's listed above confirm a fall off, in percentage terms, of the overall population over the period in the 65 to 74 age bracket. There has also been a reduction in the population numbers in this bracket in 3 of the 4 LGA's. The Sydney LGA is the exception with strong growth from 5,439 in 1996 to 7,156 in 2006. This obviously

reflects the strong growth in high rise residential accommodation in and around the Sydney CBD.

- In the 75 to 84 age bracket over the period there has been small increase, in percentage terms, in Woollahra and Randwick whilst there has been a decline in Waverley and Sydney. It is important however to bear in mind that with Sydney, although there has been a drop in percentage terms, there has been a significant increase in the number of people from 2,967 to 4,250.
- It is the 85 plus group where there has been an increase in percentage terms in all of the LGA's, except Sydney. There has also been an increase in the number of residents in this group including Sydney. It is the 85 plus group that is growing significantly, in percentage terms, all over Australia. This is the greatest concern for the Government as they need to ensure that there are sufficient residential high care places and high care community places (Extended Aged Care at Home) places to match this expected continuing growth in this group the average life span of Australians continues to increase.
- Although there is a reduction in 3 of the LGA's in relation to the emerging aged (65 to 74), this is offset by the strong increase in the Sydney LGA.

Population projections are available for all ages based upon the 2006 Census information, covering the period 2007 to 2027. The projections for the ages 70 to 84 have been aggregated and listed below for the 4 LGA's along with the 85 plus projections.

POPULATION PROJECTIONS 2007 - 2027								
Woollahra, Waverley & Randwick								
Year	Population 70 to 84				Population 85+			
	Woollahra	Waverley	Randwick	Total	Woollahra	Waverley	Randwick	Total
2007	7,710	7,751	16,087	31,548	1,461	1,458	2,173	5,092
2008	7,662	7,611	16,042	31,315	1,548	1,506	2,288	5,342
2009	7,515	7,523	15,895	30,933	1,668	1,549	2,411	5,628
2010	7,477	7,394	15,762	30,633	1,746	1,593	2,534	5,873
2011	7,505	7,290	15,737	30,532	1,808	1,627	2,634	6,069
2012	7,586	7,277	15,720	30,583	1,860	1,628	2,715	6,203
2013	7,664	7,346	15,752	30,762	1,917	1,604	2,805	6,326
2014	7,812	7,388	15,862	31,062	1,954	1,631	2,882	6,467
2015	8,002	7,446	16,091	31,539	1,992	1,642	2,954	6,588
2016	8,243	7,614	16,404	32,261	2,030	1,639	3,004	6,673
2017	8,684	7,818	16,897	33,399	2,023	1,636	3,020	6,679
2018	9,103	8,030	17,386	34,519	2,033	1,640	3,039	6,712
2019	9,497	8,262	17,904	35,663	2,042	1,640	3,044	6,726
2020	9,909	8,504	18,516	36,929	2,055	1,643	3,049	6,747
2021	10,273	8,826	19,072	38,171	2,072	1,634	3,087	6,793
2022	10,649	9,119	19,780	39,548	2,105	1,645	3,128	6,878
2023	11,039	9,404	20,436	40,879	2,140	1,655	3,184	6,979
2024	11,367	9,659	21,047	42,073	2,179	1,684	3,231	7,094
2025	11,680	9,947	21,604	43,231	2,228	1,709	3,301	7,238
2026	11,893	10,209	22,158	44,260	2,302	1,743	3,376	7,421
2027	12,020	10,470	22,742	45,232	2,383	1,775	3,438	7,596

Table 2 (a)

POPULATION PROJECTIONS 2007 - 2027										
Sydney LGA										
Year	Population 70 to 84					Population 85+				
	East	Inner	South	West	Total	East	Inner	South	West	Total
2007	3,968	1,192	4,405	2,373	11,938	699	150	424	201	1,474
2008	3,933	1,290	4,488	2,401	12,112	745	163	433	241	1,582
2009	3,973	1,402	4,568	2,457	12,400	779	163	446	285	1,673
2010	3,968	1,505	4,671	2,525	12,669	825	171	468	316	1,780
2011	4,047	1,621	4,751	2,605	13,024	852	181	480	335	1,848
2012	4,096	1,757	4,874	2,707	13,434	894	186	493	357	1,930
2013	4,124	1,881	4,990	2,778	13,773	936	201	509	388	2,034
2014	4,280	2,028	5,111	2,952	14,371	940	215	527	400	2,082
2015	4,444	2,175	5,287	3,106	15,012	942	224	541	421	2,128
2016	4,587	2,339	5,486	3,290	15,702	962	240	560	432	2,194
2017	4,813	2,527	5,725	3,511	16,576	970	256	573	445	2,244
2018	5,025	2,719	5,954	3,741	17,439	972	272	598	452	2,294
2019	5,209	2,915	6,201	3,991	18,316	982	292	615	457	2,346
2020	5,405	3,101	6,488	4,260	19,254	998	311	638	468	2,415
2021	5,570	3,318	6,787	4,491	20,166	1,022	330	654	479	2,485
2022	5,731	3,548	7,134	4,733	21,146	1,050	353	689	499	2,591
2023	5,933	3,789	7,469	4,984	22,175	1,067	377	716	515	2,675
2024	6,086	4,024	7,810	5,189	23,109	1,099	404	740	546	2,789
2025	6,240	4,256	8,183	5,413	24,092	1,122	433	770	566	2,891
2026	6,367	4,489	8,553	5,603	25,012	1,165	464	796	593	3,018
2027	6,485	4,723	8,959	5,767	25,934	1,204	493	818	621	3,136

Table 2 (b)

- These projections cover the 70 to 84 group as well as the 85 plus population. With the growing longevity of the population, it is anticipated that it will be essentially the 70 plus group that will be the anticipated clientele for both independent living units as well as residential aged care.
- The Sydney LGA has been separated from Woollahra, Waverley and Randwick because of its size and the expectation of probably aged people in the East and Inner Statistical Local Areas (SLAs) comprising the major part of the resident catchment for the Scottish Hospital site.
- There is anticipated very strong growth in both the Woollahra and Waverley LGAs for the 70 to 84 population over the 20 year period. The Waverley increase is less significant.
- In percentage terms by far the biggest increase in the 70 to 84 group will be in the Inner Sydney SLA (296%).
- In terms of total numbers predicated over the 20 year period from 2009 to 2027 for the 70 to 84 group the combined total increase for Woollahra, Waverley and Randwick (14,299) will be almost matched by the Sydney LGA (13,534)
- In the projected 85 and above population, Woollahra will experience the strongest growth in percentage terms when compared to Waverley and Randwick although, as expected, all three will experience a significant increase. The increases expected in this group of the Sydney LGA is not as dramatic as may have been expected.

- Taking into account all 4 LGAs, the anticipated total of the 85 and above population in 2027 will be 10,732 as compared to the 2007 projection of 6,566, an increase of 163%. The percentage increase over the same period for the 70 to 84 group is 164%.
- The projections clearly demonstrate the need for a major increase in accommodation and care services for the aged over the period.

## 4. Socio Economic Profile

### a) Income

Set out below is information taken from the 2006 Census in relation to Gross Weekly Earnings covering the groups 65 to 74, 75 to 84 and 85 plus in each of the 4 LGA's.

GROSS WEEKLY INCOME FOR PEOPLE AGED 65 + WOOLLAHRA LGA							
INCOME	Age 65 – 74	Age 75 – 84	Age 85 +	Total 65 +	%	Total NSW 65 +	%
Negative/Nil Income	117	103	59	279	3.51%	25,773	2.85%
\$1 - \$149	92	85	31	208	2.62%	41,534	4.59%
\$150 - \$249	260	304	152	716	9.01%	294,263	32.49%
\$250 - \$399	341	388	230	959	12.06%	233,523	25.78%
\$400 - \$599	343	287	131	761	9.57%	100,073	11.05%
\$600 - \$799	266	198	77	541	6.81%	39,453	4.36%
\$800 - \$999	270	222	90	582	7.32%	22,944	2.53%
\$1000 - \$1299	280	187	63	530	6.67%	17,909	1.98%
\$1,300 - \$1,599	219	156	55	430	5.41%	9,090	1.00%
\$1600 - \$1999	193	117	42	352	4.43%	6,060	0.67%
\$2000 or more	620	447	131	1198	15.07%	12,466	1.38%
Individual Income not stated	534	535	325	1394	17.53%	102,692	11.34%
<b>Total</b>	<b>3,535</b>	<b>3,029</b>	<b>1,386</b>	<b>7,950</b>	<b>100.00%</b>	<b>905,780</b>	<b>100.00%</b>

Table 3 (a)

GROSS WEEKLY INCOME FOR PEOPLE AGED 65 + WAVERLEY LGA							
INCOME	Age 65 – 74	Age 75 – 84	Age 85 +	Total 65 +	%	Total NSW 65 +	%
Negative/Nil Income	141	91	40	272	3.43%	25,773	2.85%
\$1 - \$149	148	98	60	306	3.86%	41,534	4.59%
\$150 - \$249	701	627	257	1585	20.00%	294,263	32.49%
\$250 - \$399	598	655	314	1567	19.78%	233,523	25.78%
\$400 - \$599	432	307	129	868	10.95%	100,073	11.05%
\$600 - \$799	265	162	55	482	6.08%	39,453	4.36%
\$800 - \$999	184	137	34	355	4.48%	22,944	2.53%
\$1000 - \$1299	155	112	34	301	3.80%	17,909	1.98%
\$1,300 - \$1,599	96	52	27	175	2.21%	9,090	1.00%
\$1600 - \$1999	74	40	13	127	1.60%	6,060	0.67%
\$2000 or more	126	83	26	235	2.97%	12,466	1.38%
Individual Income not stated	597	683	371	1651	20.84%	102,692	11.34%
<b>Total</b>	<b>3,517</b>	<b>3,047</b>	<b>1,360</b>	<b>7,924</b>	<b>100.00%</b>	<b>905,780</b>	<b>100.00%</b>

Table 3 (b)



<b>GROSS WEEKLY INCOME FOR PEOPLE AGED 65 +</b>							
<b>SYDNEY LGA</b>							
<b>INCOME</b>	<b>Age</b>	<b>Age</b>	<b>Age</b>	<b>Total</b>	<b>%</b>	<b>Total NSW</b>	<b>%</b>
	<b>65 – 74</b>	<b>75 – 84</b>	<b>85 +</b>	<b>65 +</b>		<b>65 +</b>	
Negative/Nil Income	239	95	58	392	3.06%	25,773	2.85%
\$1 - \$149	256	174	50	480	3.74%	41,534	4.59%
\$150 - \$249	1,907	1,219	310	3436	26.80%	294,263	32.49%
\$250 - \$399	1,058	836	336	2230	17.39%	233,523	25.78%
\$400 - \$599	550	314	85	949	7.40%	100,073	11.05%
\$600 - \$799	272	111	27	410	3.20%	39,453	4.36%
\$800 - \$999	208	81	18	307	2.39%	22,944	2.53%
\$1000 - \$1299	223	78	27	328	2.56%	17,909	1.98%
\$1,300 - \$1,599	112	45	12	169	1.32%	9,090	1.00%
\$1600 - \$1999	91	33	11	135	1.05%	6,060	0.67%
\$2000 or more	286	114	32	432	3.37%	12,466	1.38%
Individual Income not stated	1954	1155	443	3552	27.71%	102,692	11.34%
<b>Total</b>	<b>7,156</b>	<b>4,255</b>	<b>1,409</b>	<b>12,820</b>	<b>100.00%</b>	<b>905,780</b>	<b>100.00%</b>

Table 3 (c)

<b>GROSS WEEKLY INCOME FOR PEOPLE AGED 65 +</b>							
<b>RANDWICK LGA</b>							
<b>INCOME</b>	<b>Age</b>	<b>Age</b>	<b>Age</b>	<b>Total</b>	<b>%</b>	<b>Total NSW</b>	<b>%</b>
	<b>65 – 74</b>	<b>75 – 84</b>	<b>85 +</b>	<b>65 +</b>		<b>65 +</b>	
Negative/Nil Income	313	207	72	592	3.73%	25,773	2.85%
\$1 - \$149	421	292	92	805	5.07%	41,534	4.59%
\$150 - \$249	2,035	1,792	580	4407	27.77%	294,263	32.49%
\$250 - \$399	1,481	1,566	582	3629	22.87%	233,523	25.78%
\$400 - \$599	931	638	176	1745	11.00%	100,073	11.05%
\$600 - \$799	498	288	73	859	5.41%	39,453	4.36%
\$800 - \$999	327	164	37	528	3.33%	22,944	2.53%
\$1000 - \$1299	270	109	42	421	2.65%	17,909	1.98%
\$1,300 - \$1,599	132	64	23	219	1.38%	9,090	1.00%
\$1600 - \$1999	92	36	10	138	0.87%	6,060	0.67%
\$2000 or more	141	90	20	251	1.58%	12,466	1.38%
Individual Income not stated	952	943	381	2276	14.34%	102,692	11.34%
<b>Total</b>	<b>7,593</b>	<b>6,189</b>	<b>2,088</b>	<b>15,870</b>	<b>100.00%</b>	<b>905,780</b>	<b>100.00%</b>

Table 3 (d)

Important points to note from the above tables are as follows:-

- The Income Group \$150 to \$249 includes full pensioners with little other income.
- The group with earnings of \$250 to \$399 comprises those people who would be on a part pension with other income from savings and/or superannuation.

- A reasonable proportion of those with incomes between \$400 and \$599 per week could be expected to be the first group that may consider independent living unit accommodation and extra service arrangements in residential aged care.
- In all LGAs there is a significant group of residents in the income bracket of \$600 to \$2,000 or more who would be definite extra service and independent living unit targets. The number and percentage from each of the LGAs, and for NSW, in this group is as follows:-

Woollahra	Waverley	Sydney	Randwick	NSW
45.71%	21.14%	13.89%	15.22%	11.92%
3,633	1,675	1,781	2,416	107,9052

- It is noted that particularly in the Waverley and Sydney LGAs there is a very high percentage where individual income was not stated. In recent similar reviews covering the Sutherland and Baulkham Hills Shires this percentage was significantly lower. This percentage noted in respect of the total for NSW was only 11.34%. It may be reasonable to assume that a fair proportion of the residents in this bracket may have significant income.
- Particularly Woollahra and Waverley LGAs have a significantly higher proportion of residents in the \$600 plus groups when compared to the NSW average. Although the Sydney and Randwick LGAs are not as strong in this regard, they are still above the State average.
- The figures in these tables confirm the overall affluence of the residents of the four local Government areas. Although the key consideration in the development of the Scottish Hospital site will be the asset position of people in the target markets, the income information is particularly significant in relation to possible Extra Service arrangements in residential aged care. It is also relevant to the independent living operation where it would be anticipated, due to the service requirements of residents that the recurrent charges may be significantly higher than the average of other retirement villages.

## b) Home Ownership

The major asset for the majority of people who would be entering accommodation and/or care, and could pay an Entry Contribution or Accommodation Bond is the family home. The next two tables extracted from the 2006 Census material indicate the type of dwellings in each of the LGAs and the level of ownership.

TYPE OF DWELLINGS						
LGA	Separate Houses	Semi Detached/ Townhouses	Flat/Unit	Other	Not Stated	TOTAL
WOOLLAHRA	4,895	4,218	10,272	132	44	19,561
WAVERLEY	5,287	4,089	13,262	165	5	22,808
SYDNEY	3,162	13,373	42,381	653	101	59,670
RANDWICK	15,020	6,739	22,763	273	53	44,848

Table 4

<b>HOME OWNERSHIP STATISTICS</b>							
<b>LGA</b>	<b>Owned Only – No. of Dwellings</b>			<b>Ownership</b>			
	<b>Houses</b>	<b>Units/Flat/ Townhouse</b>	<b>Others</b>	<b>Owned</b>	<b>Being Purchased</b>	<b>Rented</b>	<b>TOTAL</b>
<b>WOOLLAHRA</b>	2,715	4,505	50	7,270	4,251	7,237	18,758
<b>WAVERLEY</b>	2,446	4,077	38	6,561	5,160	10,153	21,874
<b>SYDNEY</b>	1,010	7,209	43	8,262	12,804	36,242	57,308
<b>RANDWICK</b>	7,591	5,568	46	13,205	9,836	20,291	43,332

Table 5

Matters to note from this information are as follows:-

- The percentage of home ownership and the percentage of homes in the process of being purchased are as follows:-

	<b>Woollahra</b>	<b>Waverley</b>	<b>Sydney</b>	<b>Randwick</b>
<b>Owned</b>	39%	30%	14%	30%
<b>Being Purchased</b>	23%	24%	22%	23%
<b>TOTAL</b>	<b>62%</b>	<b>54%</b>	<b>36%</b>	<b>53%</b>

- There is a significantly higher proportion of home ownership (including being purchased) in the Woollahra LGA.
- Although the proportion of home ownership in the Sydney LGA is not high, in terms of sheer numbers it ranks close to the Randwick LGA, which is the highest.
- As anticipated, there are very few houses in the Sydney LGA with most accommodation being in units/apartments. Although Woollahra and Waverley have a reasonable proportion of houses, it is Randwick that is more in line with other Sydney LGAs.
- The combined home ownership rate coupled with the significant proportion of the population 65 and above with income levels above \$600 per week, are good long term indicators for successful aged accommodation and care development.

## 5. House Price Information

Set out below are the two schedules listing Current Housing Price Information prepared by Residex covering each of the relevant post codes in the four LGAs. This table provides details separately on houses and units, listing median values for the March 2009 Quarter as well as the previous year and the Capital Growth over the previous year.

Housing price information is vital for both independent living and residential care considerations as it will be principally the proceeds from the sale of the potential resident's home that will be the source of the required Entry Contribution or Accommodation Bond.

PROPERTY ANALYSIS FOR LGA MEDIAN VALUES AS AT MARCH 2009								
			HOUSES			UNITS		
			MEDIAN VALUE		CAPITAL GROWTH LAST YEAR	MEDIAN VALUE		CAPITAL GROWTH LAST YEAR
			CURRENT QUARTER	LAST YEAR		CURRENT QUARTER	LAST YEAR	
LGA	SUBURB	POSTCODE	\$	\$	%	\$	\$	%
WOOLLAHRA	PADDINGTON *	2021	1,297,000	1,375,000	-5.69%	\$452,000	\$425,500	6.24%
WOOLLAHRA	BELLEVUE HILL	2023	3,522,500	3,575,500	-1.49%	\$663,500	\$626,500	5.97%
WOOLLAHRA	WOOLLAHRA	2025	2,012,500	2,042,500	-1.48%	\$684,500	\$669,500	2.24%
WOOLLAHRA	DARLING POINT	2027	5,025,500	5,305,500	-5.28%	\$1,277,500	\$1,313,000	-2.70%
WOOLLAHRA	EDGECLIFF	2027	1,278,000	1,207,000	5.87%	\$552,500	\$519,500	6.35%
WOOLLAHRA	POINT PIPER	2027				\$1,998,500	\$1,883,500	6.11%
WOOLLAHRA	DOUBLE BAY	2028	2,685,500	2,698,000	-0.46%	\$717,000	\$764,000	-6.16%
WOOLLAHRA	ROSE BAY *	2029	2,161,500	2,220,500	-2.65%	\$651,000	\$664,500	-1.98%
WOOLLAHRA	VAUCLUSE *	2030	3,418,000	3,453,500	-1.03%	\$626,000	\$594,000	5.38%
WOOLLAHRA	WATSONS BAY	2030	2,737,500	2,462,000	11.17%			
WAVERLEY	BONDI JUNCTION	2022	1,109,500	1,073,500	3.36%	\$554,000	\$519,500	6.72%
WAVERLEY	QUEENS PARK	2022	1,630,500	1,647,000	-1.00%	\$546,500	\$531,500	2.91%
WAVERLEY	BRONTE	2024	2,299,500	2,208,000	4.15%	\$600,000	\$576,000	4.16%
WAVERLEY	WAVERLEY	2024	1,284,500	1,269,000	1.24%	\$530,500	\$501,500	5.77%
WAVERLEY	BONDI	2026	1,300,500	1,294,500	0.44%	\$584,500	\$591,000	-1.08%
WAVERLEY	BONDI BEACH	2026	1,418,500	1,474,000	-3.80%	\$552,500	\$562,500	-1.80%
WAVERLEY	NORTH BONDI	2026	1,483,500	1,536,500	-3.46%	\$618,000	\$607,000	1.80%
WAVERLEY	DOVER HEIGHTS	2030	2,592,500	2,561,000	1.23%	\$603,000	\$588,500	2.44%
SYDNEY	DAWES POINT	2000				\$1,708,000	\$1,559,000	9.55%
SYDNEY	HAYMARKET	2000				\$533,000	\$547,500	-2.64%
SYDNEY	MILLERS POINT	2000				\$827,000	\$791,000	4.52%
SYDNEY	SYDNEY	2000				\$486,500	\$484,500	0.35%
SYDNEY	THE ROCKS	2000				\$791,500	\$767,500	3.15%
SYDNEY	ULTIMO	2007	702,000	676,000	3.85%	\$389,000	\$393,000	-1.08%
SYDNEY	CHIPPENDALE	2008	686,500	638,500	7.53%	\$411,500	\$384,000	7.08%
SYDNEY	DARLINGTON	2008	663,000	655,000	1.23%			
SYDNEY	PYRMONT	2009	902,000	913,000	-1.24%	\$537,500	\$507,000	6.02%
SYDNEY	DARLINGHURST	2010	974,000	984,500	-1.06%	\$497,000	\$476,000	4.39%
SYDNEY	SURRY HILLS	2010	880,000	919,500	-4.31%	\$443,500	\$415,500	6.74%
SYDNEY	ELIZABETH BAY	2011				\$473,500	\$465,000	1.80%
SYDNEY	POTTS POINT	2011				\$417,000	\$387,000	7.77%
SYDNEY	RUSHCUTTERS BAY	2011				\$538,000	\$551,500	-2.53%
SYDNEY	WOOLLOOMOOLOO	2011				\$517,000	\$526,500	-1.80%
SYDNEY	ALEXANDRIA	2015	752,500	767,500	-1.98%	\$397,000	\$388,000	2.29%
SYDNEY	BEACONSFIELD	2015				\$489,500	\$492,500	-0.63%
SYDNEY	EVLEIGH	2015				\$464,500	\$456,500	1.78%
SYDNEY	REDFERN	2016	708,000	878,500	4.70%	\$432,000	\$428,500	0.80%
SYDNEY	WATERLOO	2017	635,000	600,000	5.85%			
SYDNEY	ZETLAND	2017				\$532,000	\$517,000	2.87%
SYDNEY	ROSEBERY	2018	861,000	810,500	6.21%	\$420,500	\$399,000	5.42%
SYDNEY	CENTENNIAL PARK	2021	4,137,500	4,161,500	-0.58%	\$428,000	\$391,000	9.51%
SYDNEY	MOORE PARK	2021						
SYDNEY	FOREST LODGE	2037	796,000	793,500	0.36%	\$466,500	\$445,500	4.65%
SYDNEY	GLEBE	2037	913,500	919,500	-0.66%	\$474,000	\$485,500	-2.42%
SYDNEY	ANNANDALE	2038	870,500	854,000	1.93%	\$443,500	\$439,000	0.99%
SYDNEY	NEWTOWN	2042	682,500	668,000	2.16%	\$374,000	\$344,500	8.58%
SYDNEY	ERSKINEVILLE	2043	684,000	665,500	2.82%	\$477,500	\$464,000	2.96%
SYDNEY	ST PETERS	2044	584,500	574,000	1.82%	\$378,500	\$399,500	-5.33%
SYDNEY	CAMPERDOWN	2050	726,500	741,000	-1.95%	\$470,000	\$442,500	6.23%
RANDWICK	CLOVELLY	2031	1,757,500	1,667,000	5.45%	\$691,000	\$670,000	3.12%
RANDWICK	RANDWICK	2031	1,352,000	1,330,500	1.63%	\$500,500	\$482,500	3.69%
RANDWICK	KINGSFORD	2032	996,500	973,500	2.33%	\$440,500	\$439,500	0.18%
RANDWICK	KENSINGTON	2033	1,384,000	1,441,000	-3.96%	\$453,000	\$442,000	2.52%
RANDWICK	COOGEE	2034	1,441,500	1,414,000	1.96%	\$580,500	\$584,000	-0.63%
RANDWICK	MAROUBRA	2035	1,001,500	988,500	1.33%	\$475,000	\$471,000	0.92%
RANDWICK	LITTLE BAY	2036	883,500	842,500	4.86%	\$873,500	\$794,500	9.95%
RANDWICK	MATRAVILLE	2036	809,500	792,000	2.17%	\$465,500	\$447,500	4.09%
* LGA boundaries results in parts of these suburbs being under 2 LGAs.								
AVERAGE			1,173,647	1,168,603	1.31%	\$542,864	\$526,284	2.86%
LOWEST			584,500	574,000	-4.31%	\$374,000	\$344,500	-5.33%
HIGHEST			4,137,500	4,161,500	7.53%	\$1,708,000	\$1,559,000	9.95%

Table 6

Matters to consider in relation to the above table are as follows:-

- The median house prices in Woollahra are overall at levels well above the other LGA's. There however is not such a significant variation in relation to units although overall it is still higher than the other LGAs.
- The current median value house prices in the Woollahra, Waverley and Randwick LGAs suggests that a high proportion of houses would be of sufficient value to ensure that residents entering both independent living and residential care would be able to pay a significant Entry Contribution or Accommodation Bond and still retain a reasonable cash reserve.
- There is also strong median values in respect of units in many of the suburbs that would suggest that many unit dwellers would be able to also provide a significant Entry Contribution or Accommodation Bond. It should be noted however that the Accommodation Bond levels are likely to be significantly lower than the Entry Contributions required for the independent living units. Therefore a potentially larger market would be available for the residential care operation.
- Although there has been negative capital growth in a number of suburbs, this is not unexpected in view of the economic downturn. It is however important to note that many of the suburbs have experienced some capital growth.
- There has been an overall stronger level of capital growth in the unit sector than the house sector. This would not be unexpected however in light of the much lower median prices.
- As well as the median values the averages for the combined LGAs is also listed as is the lowest and highest prices. This information confirms that a large majority of house owners in the four LGAs would be in a position to enter an independent living unit or provide a sound Accommodation Bond, with the lowest house price being \$584,500 in the March quarter.
- The average prices of units would suggest that a reasonably high proportion of unit dwellers would be in a position to provide a sound Accommodation Bond. In terms of Entry Contributions for independent living units, the numbers would be significantly lower, especially bearing in mind that generally people entering retirement villages want to retain a reasonable proportion of the sales price of their home (generally in the region of 20% to 30%).
- If it is considered that the central catchment area will be the Woollahra and Waverley LGAs, the income from the sale of most houses would provide potential independent living unit residents with ample funds to provide a sound Entry Contribution. In respect of those who own units, there will no doubt be a fair proportion that may feel that they do not have sufficient overall funds to provide the required Entry Contribution and retain a suitable cash reserve.

## 6. Aged Care Services

Listed below is information extracted from the Department of Health & Ageing Annual Report for 2007/08 listing the allocated and operational aged care places for NSW as well as the South East Sydney region, of which Woollahra, Waverley, Randwick and Sydney are part.

When considering the allocation of aged care places in each region the Department of Health & Ageing take into account a number of factors, with the primary factor being the Government's target ratio of places per thousand people 70 years and above. The target ratio for residential aged care is 88 places whilst community care is 25 places.

NSW Allocated & Operational Aged Care Places per 1,000 Persons Aged 70 Years and Over at 30 June 2008							
Ratio of Allocated Places				Ratio of Operational Places			
All Residential	Community Care	Transition Care	TOTAL	All Residential	Community Care	Transition Care	TOTAL
99.9	22.9	1.1	124.0	87.2	22.8	1.0	111.0

Table 7

SOUTH EAST SYDNEY REGION Allocated & Operational Aged Care Places per 1,000 Persons Aged 70 and Over at 30 June 2008							
Ratio of Allocated Places				Ratio of Operational Places			
All Residential	Community Care	Transition Care	TOTAL	All Residential	Community Care	Transition Care	TOTAL
95.6	22.4	-	118.0	78.2	22.4	-	100.6

Table 8

Important information to note in relation to the above tables is as follows:-

- Although it appears the region is over bedded relative to the Department's desired ratio, the Department takes into account demographic projections as well as the lead time for new developments to come on stream. In addition there is often considerable disparity in numbers between LGAs within regions. This is certainly the case in the South East Sydney region. This is explored further later in this report.
- The difference between allocated places and operational places (17.4) demonstrates there is still a significant number of residential care places to come on line. The majority of these places however are in other LGAs within the region. The Sutherland Shire in particular has a very high number of allocated places that are not yet operational.
- It is essential to look beyond the regional statistics, particularly in those regions where they comprise a large geographical area. It is often the case that one or two LGAs in a region will have a major over supply of places which will suggest that the region is adequately serviced. The Government when considering allocations takes into account the demographic data and allocated places by Statistical Local Government Area (SLA) as part of the allocation process.

Further allocations have been announced following the assessment of the 2008/09 Aged Care Approval Round and the places allocated to the South East Sydney region are noted below.

<b>2008/09 Aged Care Approval Round Allocated Places South East Sydney</b>							
Provider	All Residential		Community Care			Transition Care	Total
	LC	HC	CACP	EACH	EACHD		
Catholic Healthcare – Stanmore					10		10
Hammond Care – Sylvania Waters			14	10			24
Kincare Community – tba			18				18
Kincare Community – Baulkham Hills				5			5
Kincare Community – tba					8		8
Sydney Anglican Home Mission – Sutherland			15	4			19
Thomas Holt Villages – Sutherland			15				15
Trustees Catholic Aged Care – John Paul Village-Heathcote			15				15
Baptist Community Svcs – Bangor	33						33
Juliana Village Assoc Ltd – Miranda	17	32					49
Marlowe Homes Pty Ltd – Bexley	0	6					
Moran Australia – Sylvania		12					12
Moran Australia – Engadine	15	105					120
Palms Aged Living Management – Kirrawee	35						35
Sir Moses Montefiore Jewish Home – Randwick	40	40					80
The Sisters of Our Lady of China – Beverley Park	100	40					140
<b>TOTAL</b>	<b>475</b>		<b>114</b>				<b>589</b>

Table 9

Matters to note from this table are as follows:-

- Only 80 places have been allocated to the four catchment LGAs. This was 40 high care and 40 low care places allocated to the Sir Moses Montefiore Jewish Home at Randwick which caters essentially for Jewish people.
- The earlier ACAR allocation information listed below confirms only four allocations to the four LGAs over the four years prior to 2008/09.

In view of the substantial lead time for residential aged care facilities between allocation and operation of places, a table listing the results of the Aged Care Approval Round allocations for the past 4 years has been prepared. This will provide information on new residential care places likely to come on stream over the coming years.



<b>SOUTH EAST REGION</b> <b>Previous 4 years (2004-2007)</b> <b>Aged Care Approval Round Allocated Places</b>								
Year	Facility	All Residential		Community Care			Transition Care	Total
		LC	HC	CACP	EACH	EACHD		
2004/5	Catholic Health Care Services Ltd – Waterloo			15				15
2004	Catholic Health Care Services Ltd (General) – Waterloo			15				15
2004	Sydney Multicultural Community Services Incorporated – Daceyville			15				15
2004	Anglicare NSW (Sydney Anglican Home Mission) – Jannali	48						48
2004	Aspic Holdings Pty Ltd – Mortdale	60						60
2004	Danvero Pty Ltd – Penshurst	65	25					90
2004	Holmwood Holdings Pty Ltd - Bexley	6						6
2004	Illawarra Retirement Trust – Peakhurst	9						9
2004	Marlowe Homes Pty Ltd – Bexley	2						2
2004	Pender Bros Pty Limited – Hurstville	24						24
2004	Southern Cross Care (NSW&ACT) Inc - Daceyville	8						8
2004	St Basils Homes – Miranda	35						35
2004	St Luke's Hospital Complex – Little Bay	80	43					123
2004	St Luke's Hospital Complex – Miranda	80						80
2004	Starcrest Holdings Pty Ltd – Bondi	70						70
2004	The Trustees of Roman Catholic Church for Archdiocese of Sydney – Heathcote	12						12
2004	The Trustees of the Sisters of Our Lady of China – Peakhurst	3						3
2005/06	Anglican Retirement Villages – Kirrawee			20				20
2005	Catholic Health Care Services Ltd – Waterloo			10	10			20
2005	St George Migrant Resource Centre Inc – Bexley			10				10
2005	The Corporation of Synod of the Diocese of Brisbane				15			15
2005	The Hammond Care Group – Hammondville				10	15		25
2005	The Uniting Church in Australia Property Trust (NSW) – Bondi Junction				15			15
2005	The Uniting Church in Australia Property Trust (NSW) – Botany			10				10
2005	Wyanga Aboriginal Aged Care Program Incorporated – Redfern			10				10
2005	Amity Group Pty Ltd – Caringbah		80					80
2005	IBIS (No. 2) Pty Ltd – Miranda	1						1



<b>SOUTH EAST REGION</b> <b>Previous 4 years (2004-2007)</b> <b>Aged Care Approval Round Allocated Places</b>									
Year	Facility	All Residential		Community Care			Transition Care	Total	
		LC	HC	CACP	EACH	EACHD			
2006/07	Anglican Retirement Villages – Clovelly				6	6		12	
2006	Australian Nursing Home Foundation Ltd – Ultimo			10				10	
2006	St George Migrant Centre – Bexley			9				9	
2006	The Hammond Care Group – Hammondville			10	14	15		39	
2006	The Uniting Church in Australia Property Trust (NSW) – Bondi Junction				5	5		10	
2006	Amity Group Pty Ltd – Caringbah		32					32	
2006	Juliana Village Association Ltd – Miranda	12						12	
2006	Marlowe Homes Pty Ltd – Bexley		3					3	
2006	Sir Moses Montefiore Jewish Home – Randwick	30						30	
2006	Sydney Anglican Home Mission Society Cncl – Malabar	18						18	
2006	The Uniting Church in Australia Property Trust (NSW) – Beverly Hills	9						9	
2007/08	Anglican Retirement Villages – Taren Pt			18				18	
2007	Anglican Retirement Villages – Taren Pt			8				8	
2007	Anglican Retirement Villages – Clovelly				10	5		15	
2007	Baptist Community Services – Sutherland			15	5			20	
2007	Chinese Australian Services Society Coop Ltd – Campsie				8	3		11	
2007	Illawarra Retirement Trust – Peakhurst				5			5	
2007	Jewish Care			6				6	
2007	St Basils Homes – Miranda			10	10	4		24	
2007	Sydney Anglican Home Mission Society – Sutherland					5		5	
2007	Uniting Church in Australia Property Trust (NSW) – Sutherland			18	6	3		27	
2007	Uniting Church in Australia Property Trust (NSW) – Sutherland			10				10	
2007	Uniting Church in Australia Property Trust (NSW) – Bondi Junction			5				5	
2007	Huntingdon Nursing Home Pty Ltd – Bexley	20	40					60	
2007	Marlowe Homes Pty Ltd – Bexley	5	0					5	
2007	Moran Australia (Aged Care Svcs) – Sylvania	20	130					150	
2007	The Hammond Care Group – Miranda	30	60					90	
2007	Trustees of Roman Catholic Church for Archdiocese of Sydney – Edgecliff	5	10					15	
	<b>TOTAL</b>	<b>1,075</b>		<b>404</b>				<b>1,479</b>	

Table 10

- The residential care allocations relating to the 4 LGAs being considered are 80 high care and 43 low care to Little Bay, 70 high care to Bondi, 30 low care to Randwick and 5 low care & 10 high care to Edgecliff.
- The 5 low care and 10 high care allocated to Edgecliff will not be built and are in the process of being transferred to other operators within the Catholic Church, outside of the Eastern suburbs area.
- The 30 low care Randwick places were allocated to the Sir Moses Montefiore Jewish Home and will essentially be for Jewish people.
- The total of 123 places allocated to the St Luke's Little Bay complex could be considered to be on the fringe of the catchment area.
- This information demonstrates a significant allocation of both residential and community aged care places to the region. However it also confirms the major allocations for residential care are in areas of the region other than the Eastern suburbs and Sydney city.

Details of the current residential aged care facilities in the 4 catchment LGA's are listed below.

<b>RESIDENTIAL AGED CARE FACILITIES</b>					
<b>LGA</b>	<b>Facility</b>	<b>Suburb</b>	<b>Residential Places</b>		<b>Approved Provider</b>
			<b>LC</b>	<b>HC</b>	
<b>Woollahra LGA</b>	Albert Court Aged Care	Edgecliff	39		Trustees of Catholic Aged Care Sydney
	Presbyterian Aged Care	Paddington	53	35	Presbyterian Church (NSW) Property Trust
	Regis Wentworth Manor	Rose Bay		66	Retirement Care Australia (Rose Bay) Pty Limited
	St Luke's Villa	Woollahra	28	0	Catholic Healthcare Limited
	Woollahra Montefiore Home	Woollahra	30	10	Sir Moses Montefiore Jewish Home
	Ronald Coleman Lodge	Woollahra	63		The Uniting Church in Australia Property Trust (NSW)
	<b>TOTAL</b>		<b>313</b>	<b>111</b>	
<b>Waverley LGA</b>	Vaucluse Nursing Home	Vaucluse		63	Fresh Fields Aged Care (NSW) No.1 Pty Ltd
	Edina Hostel	Waverley	41	0	The Uniting Church in Australia Property Trust (NSW)
	Illowra Hostel	Waverley	42		The Uniting Church in Australia Property Trust (NSW)
	Charingfield	Waverley	55		The Trustees of the Christian Brothers
	Altona Nursing Home	Waverley		26	L & D Management Services Pty Ltd
	Amity at Queens Park	Waverley		104	Amity Group Pty Ltd
	Phillip House Aged Care	Waverley		70	Phillip House Nursing Home Pty Ltd
	Edina Nursing Home	Waverley		40	The Uniting Church in Australia Property Trust (NSW)
	<b>TOTAL</b>		<b>138</b>	<b>303</b>	

<b>RESIDENTIAL AGED CARE FACILITIES</b>					
<b>LGA</b>	<b>Facility</b>	<b>Suburb</b>	<b>Residential Places</b>		<b>Approved Provider</b>
			<b>LC</b>	<b>HC</b>	
<b>Sydney LGA</b>	Vincentian Village	Darlinghurst	30		Catholic Healthcare Limited
	The Sister Anne Court Hostel	Darlinghurst	50		MacKillop Aged Care
	Elizabeth Lodge	Rushcutters Bay	126		Anglican Retirement Villages
	Frederic House	Waterloo	61		The Trustees of Society St Vincent De Paul
	Gertrude Abbott nursing Home	Darlinghurst		114	MacKillop Aged Care
	St Luke's Nursing Home	Elizabeth Bay	131	23	St Luke's Care
	Darling House	Dawes Point	9		Darling House Aged Care Association Inc.
	Charles Chambers Court	Surry Hills	60		Mission Australia
	<b>TOTAL</b>		<b>467</b>	<b>157</b>	
<b>Randwick LGA</b>	Brigidine House	Coogee	30		Catholic Healthcare Limited
	St Josephs Aged Care Facility for Religious	Kensington	23	21	St Joseph's Aged Care Facility for Religious Limited
	Castellorizian Nursing Home	Kensington	8	47	Castellorizian Benevolent Fund
	St Luke's Bayside	Little Bay	28	109	St Luke's Care
	Chesalon Care Malabar	Malabar		47	Sydney Anglican Home Mission Society Council
	Amity at Maroubra	Maroubra		90	Amity Group Pty Ltd
	Camelot Nursing Home	Maroubra		80	S.M.M.J.H. Camelot Pty Ltd (Montefiore)
	Southern Cross Kildare Apartments	Maroubra Junction	24		Southern Cross Care (NSW & ACT) Inc
	St James Villa	Matraville	40		Catholic Healthcare Limited
	Hoban House	Pagewood	48		The Uniting Church in Australia Property Trust (NSW)
	Mount St Josephs Hostel	Randwick	20		Little Sisters of the Poor Aged Care Ltd
	St John Vianney's Villa	Randwick	10		Little Sisters of the Poor Aged Care Ltd
	Milford House Nursing Home	Randwick		51	Thompson Health Care Pty Ltd
	Mt St Josephs Nursing Home	Randwick	2	30	Little Sisters of the Poor Aged Care Ltd
	Frenchmans Lodge	Randwick		98	Frenchmans Lodge Nursing Home Pty Ltd
	Randwick Montefiore Home	Randwick	190	86	Sir Moses Montefiore Jewish Home
	Southern Cross Apartments	South Coogee	41		Southern Cross Care (NSW & ACT) Inc
	<b>TOTAL</b>		<b>464</b>	<b>659</b>	

Table 11

Randwick is well served with residential aged care places. The other three LGAs, which are potentially the major catchment for potential residents, are in a deficit position compared to the Government's desired ratio of 88 places per 1,000 people 70 years and over. Comparative information is listed below.

<b>Woollahra, Waverley, Sydney LGAs</b>			
<b>Projected Population 70 &amp; above as at 2009</b>	<b>Target number of H/C &amp; L/C Places</b>	<b>Actual Places</b>	<b>Shortfall</b>
32,328	2,842	1,369	1,473

If only the Woollahra and Waverley LGA's for the 70 and above population were taken into account there would be a shortfall of 233 places. This demonstrates the aged care service difficulties already facing the area. When the projected growth in the aged is taken into account it will be a crisis situation, unless services are substantially expanded.

Even allowing for the new places that have been allocated and will come on stream in these LGA's over the next few years (as noted in Tables 9 and 10) there will continue to be a very large shortfall relative to the Government's desired ratio.

## **7. Community Care Considerations**

There has been significant growth in community care in the Eastern suburbs area through the Department of Health & Ageing Community Aged Care Packages (CACPS) and Extended Aged Care at Home (EACH) programs. Significant expansion of these programs is expected in areas where the take up of residential care places is low, such as the Eastern suburbs.

The expansion of these programs in the Eastern suburbs will help alleviate the residential care places shortage but it is not a complete answer as admission to residential care may be the best care outcome for very frail residents of the area, particularly if they are living in accommodation that is not disability friendly.

The community care packages are available to residents in retirement villages, provided they have been assessed for such care by an Aged Care Assessment Team. This is of particular importance for contemporary retirement villages which are designed to accommodate disabled people. A pilot study undertaken by the Department of Health & Ageing in 2003 confirmed that residents of retirement villages receiving community based support are able to remain in the community, avoiding residential care, for on average an additional 12 months. This also resulted in a reduced occupancy period for those eventually admitted to a residential care facility.

The provision of appropriately designed independent living units, in a retirement village setting, in the catchment area being considered will assist in reducing demand for residential aged care. As demonstrated above, residential aged care is in very short supply and not likely to expand sufficiently to meet the growing need.

## **8. Retirement Villages**

The retirement village situation is similar to the residential aged care position with minimal facilities available throughout the key LGA's. Many of the villages have been in operation for a long period and do not provide the contemporary accommodation and services required to meet the growing expectations of potential clients. There is no Independent Living Unit (ILU) accommodation available in Paddington. Most of the ILU's are in small villages which do not have residential aged care facilities on site to cater for the ongoing care needs of the residents. With the very limited number of residential care places available in the key LGAs, residents requiring care may have to be accommodated in facilities outside the area.

Details of the current retirement villages in the 4 LGA's are as follows:-

<b>RETIREMENT VILLAGES IN LGA's</b>				
<b>LGA</b>	<b>Facility</b>	<b>Suburb</b>	<b>Address</b>	<b>Number</b>
<b>Woollahra LGA</b>	Anglican Retirement Villages – Goodwin Village	Woollahra	238-290 Jersey Rd, Woollahra	172 units
	Rose Bay Towers Retirement	Rose Bay	624 New South Head Rd, Rose Bay	54 units (1bed/studio)
	B'nai B'rith Retirement Villages Ltd	Rose Bay	5a-11 Princess St, Rose Bay	56 units
	Vaughan Village	Watsons Bay	341 Old South Head Rd, Watsons Bay	34 units
<b>Waverley LGA</b>	Queens Park Retirement Village	Waverley	140 Carrington Rd, Waverley	42 units
	Lifestyle Manor Bondi	Bondi	24-32 Flood St, Bondi	42 units (27 sold)
	Bondi Astra Retirement Village	Bondi Beach	34 Campbell Pde, Bondi Beach	56 units
<b>Sydney LGA</b>	Trebartha Apartments	Elizabeth Bay	61-69 Roslyn Gardens, Elizabeth Bay	60 units
	Anglican Retirement Villages – St John's Village	Glebe	75 St John's Rd, Glebe	46 units
<b>Randwick LGA</b>	Southern Cross Village	South Coogee	39 Gregory St, South Coogee	18 units (+41 supported)
	Southern Cross - Kildare Village	Maroubra Junction	216 Maroubra Rd, Maroubra Junction	16 units
	Maroubra Garden Village	Maroubra	13 Tyrwhitt St, Maroubra	60 units
	Little Bay Apartments	Little Bay	12-40 Pine Ave, Little Bay	70 units
	Benevolent Society Villages – Mirrabooka Village	Little Bay	1409a Anzac Pde, Little Bay	70 units (approx)
<b>SOUTH EAST REGION TOTAL</b>			<b>14</b>	

Table 12

## 9. Summary and Recommendations

All of the indicators outlined in this report support the development of a residential aged care and accommodation precinct on the Scottish Hospital site. However before fully committing to such a development it will be important to also consider the local stakeholder information that will be included in the Stage 2 report.

The important favourable indicators outlined in this report supporting a residential aged care and independent living development on the site are as follows:-

- Continuing strong growth in the aged and emerging aged population.
- Minimal services currently available in the area for the aged.
- Strong home ownership.
- Sound income levels for the 65 plus age group.
- Strong housing prices.
- The position of the site, being close to major services.
- Current and expected future residential aged care places significantly below the Government's desired benchmark.

- The limited number of retirement village operations and the lack of accommodation and services choice.
- The likely critical shortage of residential aged care places to match the strong growth in the aged population in Woollahra and the surrounding LGAs.
- The lack of services in the Sydney CBD where there continues to be strong growth in residential accommodation.
- Continuing availability of residential aged care places for the financially disadvantaged on site.

On the basis of the statistical information and comment provided in this report it is recommended that the predevelopment processes continue to be focussed on the development of residential aged care, independent living units (with support services) and related care/service infrastructure.

It is further recommended that no decision be taken on the service mix, facility layouts and possible Extra Service arrangements until such time as the second stage evaluation and report have been finalised, following direct contact with the various stakeholders and community organisations.

**David Wallace**  
Director