

EASTERN CREEK BUSINESS HUB

Child Care Demand Analysis



Prepared for Frasers Property Group

November 2018

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INTRODUCTION

1.0 INTRODUCTION

HillPDA has been engaged by Frasers Property Group to prepare a child care demand analysis to inform future land uses across the Eastern Creek Business Hub Precinct.

The purpose of this report is to examine the current context with respect to child care facilities in the area, in order to determine future demand.

HillPDA has prepared the indicative requirements based on the future population projections and the application of Blacktown City Council's standard rates of provision. This assessment has incorporated other indicators of need for child care, such as a review of the demographic data and information provided by key stakeholders on existing facilities, and potential future provision for social infrastructure within the Blacktown LGA.

It is understood that 700 square metres of child care floor space was previously approved under the masterplan for the site, with capacity to accommodate up to 50 child care places. Frasers now seeks to amend this approval to accommodate up to 110 child care places, with an indoor area of up to 1,200 square metres and an outdoor area of approximately 870 square metres.

ASSESSMENT METHODOLOGY

2.0 ASSESSMENT METHODOLOGY

2.1 Methodology overview

Table 1 presents the key steps and tasks which have been undertaken as part of this social infrastructure assessment.

Table 1: Assessment methodology

Phase 01	<ul style="list-style-type: none"> Site and local assessment. This included a site visit and inspection of the surrounding area, to assess the local context, identify potential impact receptors and understand the scale of the proposed change to the locality
Phase 02	<ul style="list-style-type: none"> Demographic analysis - identification of the current population community profiles in comparison to the Greater Sydney Statistical Area Identification of the key demographic changes likely to occur
Phase 03	<ul style="list-style-type: none"> Undertake an audit of the existing child care facilities and review of planned facilities
Phase 04	<ul style="list-style-type: none"> Analysis and identification of the likely child care demand and requirements

2.2 A catchment approach

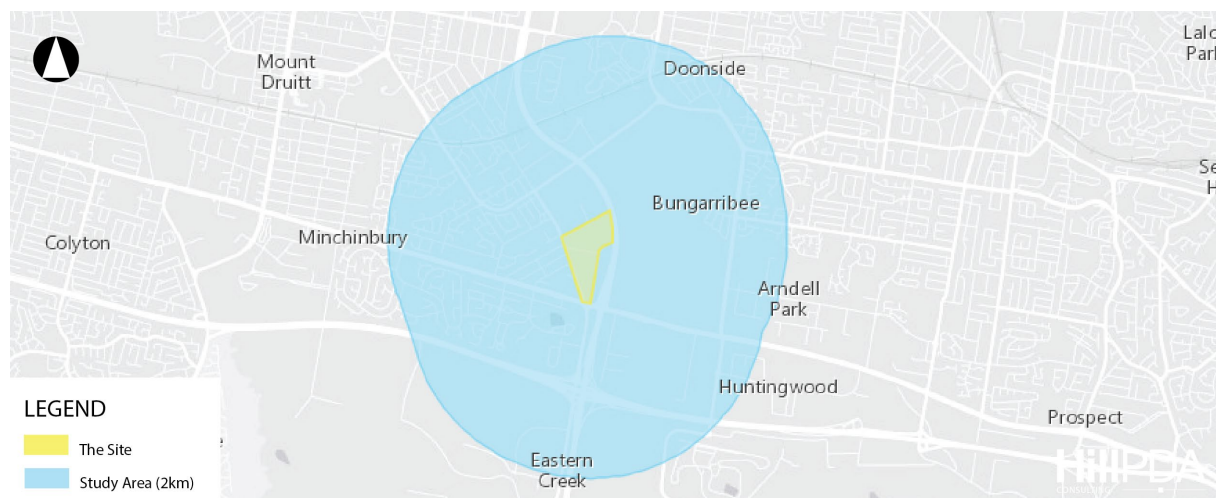
Social infrastructure facilities generally operate at three levels of provision. These are local, regional and district. The different scales of infrastructure service different sized catchments. Catchments refer to both geographical areas and the size of the population serviced. For example, a primary school is intended to serve the local population, usually within walking distance. However, a university will cater for a much wider population.

This report adopts a catchment based approach to assessing the child care requirements for the Eastern Creek Business Hub Precinct.

Child care facilities are local level facilities and generally service a catchment of up to 20,000 people. For the purpose of this study a 2km radius catchment has been selected. This radius was determined with consideration of the distribution and location of the existing and future population size and distribution.

This catchments is shown in Figure 1.

Figure 1: Social infrastructure catchment



Source: HillPDA

2.3 Demographic and population projections

Demographic data for the current population is based on the ABS 2016 Census data. This is the most current data available at the time of preparing this report. District and regional population projections have been sourced from Transport Performance and Analytics (TPA) 2017.

2.4 Future needs analysis

HillPDA has identified gaps and needs through analysing and understanding current and future estimated population, future high growth areas, current rates of social infrastructure provision and a future ideal.

Population based benchmarks identified in Chapter 6 act as a powerful tool in determining community needs, identifying supply and demand and forward planning. However, benchmarks cannot be solely relied on as they do not consider the suitability of spaces, access and connectivity issues, community needs and the practicality of meeting demand.

Therefore, this report uses benchmarks as a guide only when considering options or making recommendations about child care provision to support the needs of communities now and into the future.

COMMUNITY PROFILE

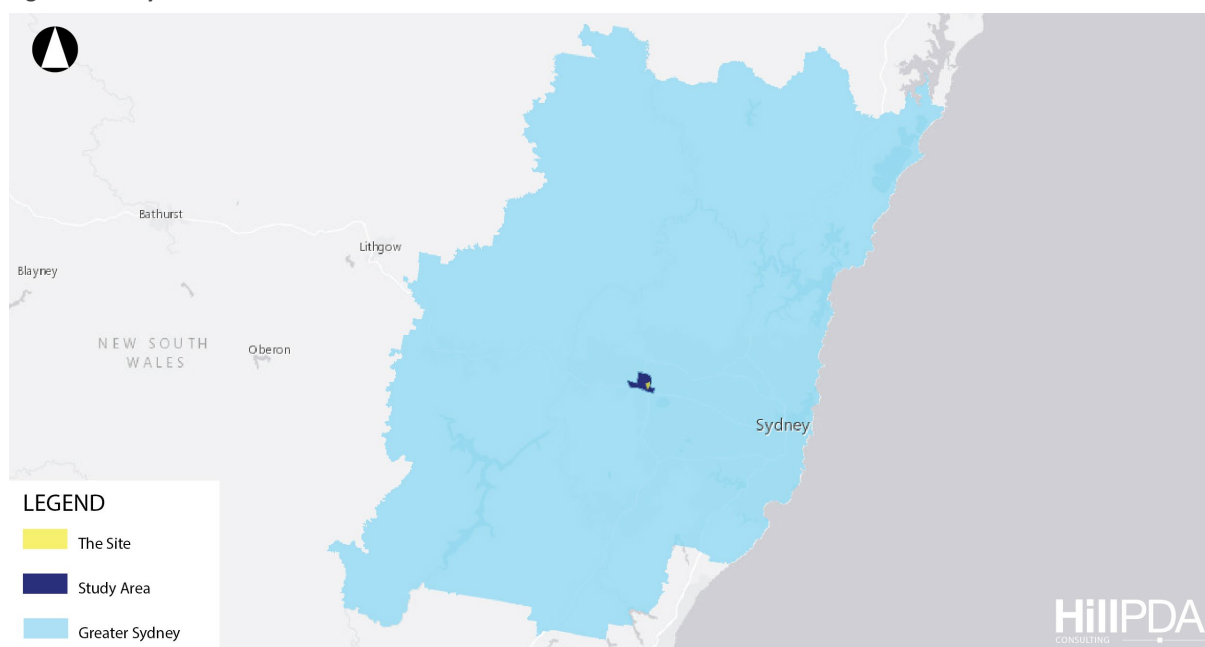
3.0 COMMUNITY PROFILE

This section provides a snapshot of the socio-economic characteristics of the study area to better understand the underlying and emerging social needs of the community, to understand facility demand and to plan for future child care provision.

3.1.1 Study area

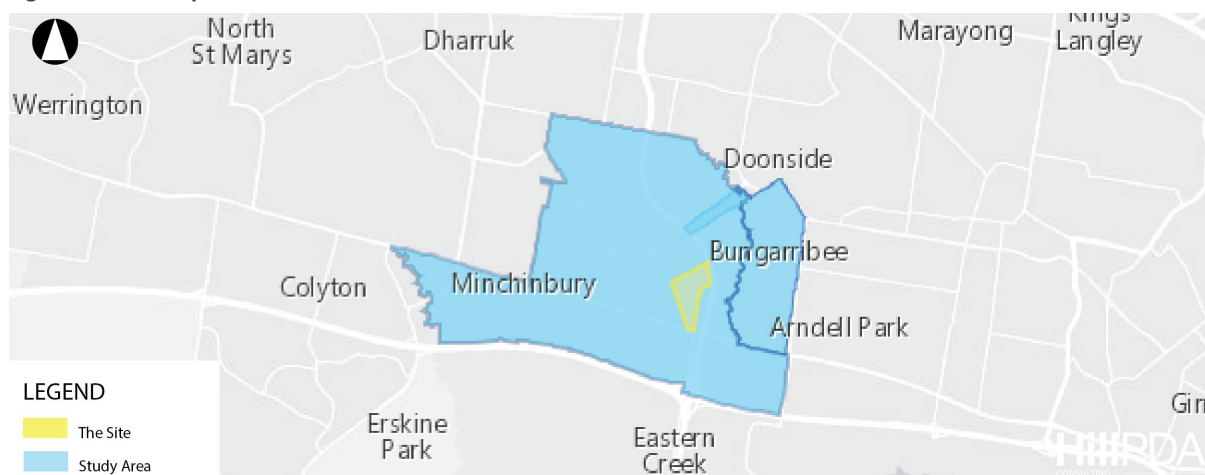
For the purpose of this analysis, the study area has been defined using the geographical area of Riverstone-Marsden Park SA2 and the Bungarribee SSC from the 2016 Australian Census of Housing and Population (ABS) 2016. This study area was selected because it closely aligns with the two kilometre catchment area.

Figure 2: Study area context



Source: HillPDA

Figure 3: SA2 Study Area



Source: HillPDA

3.1.2 Study area community profile

Category		Study area % (people)	Greater Sydney % (people)
Population	Total Population	23,815	4,823,991
	% 0-14	21% (5,117)	19%
	% 15-29	21% (5,151)	21%
	% 30-44	22% (5,454)	23%
	% 45-59	19% (4,421)	19%
	% 60-74	11% (2,630)	13%
	% 75+	4% (1,042)	6%
	Median Age	32	36
Service Categories	Early Education (0-4)	8% (1,800)	6%
	Primary (5-11)	10% (2,402)	9%
	Secondary (12-17)	8% (1,906)	7%
	Tertiary (18-24)	10% (2,454)	10%
Dwelling Type	Separate house	85%	57%
	Townhouse	13%	14%
	Flat-Unit-Apartment	2%	28%
	Other dwelling	0%	0.5%
Home Ownership	Renting	24%	35%
	Owned/Being Purchased	73%	64%
	Other	3%	1%
	Number of Dwellings	6,564	1,579,984
Household Structure	Family Households	87%	74%
	Lone Person Households	11%	21%
	Group Households	2%	5%
	Average Occupancy Rate	3.6	2.8
Family Type	Couple family w. children	60%	49%
	Couple family w/o children	24%	33
	One parent family	15%	15%
	Other family	1%	2%
Selected Medians	Median total personal income (\$/weekly)	\$697	\$719
	Median total household income (\$/weekly)	\$1,989	\$1,750
	Median rent (\$/weekly)	\$441	\$440

3.2 Key Findings

- The median age (32) of the study area is lower compared to Greater Sydney (36)
- The study area is characterised by a higher proportion of people in the younger age groups (0-14) and lower proportion in the older age groups (60+)
- There is a large number of family households in the study area with an average occupancy rate of 3.6 persons per dwelling, which is higher than Greater Sydney (2.8)
- The study area has a higher proportion of family households (87%) than Greater Sydney (74%)

- The study area has a higher proportion of children under 4 years (8%) than Greater Sydney (6%)
- Dwelling diversity within the study area is limited with detached dwellings comprising of 85% of the overall housing stock and only 2% flats-units or apartments
- The median incomes in the study area (\$697 personal and \$1,989 per household) was slightly lower than Greater Sydney (\$719 personal and \$1,750 household).

FUTURE GROWTH

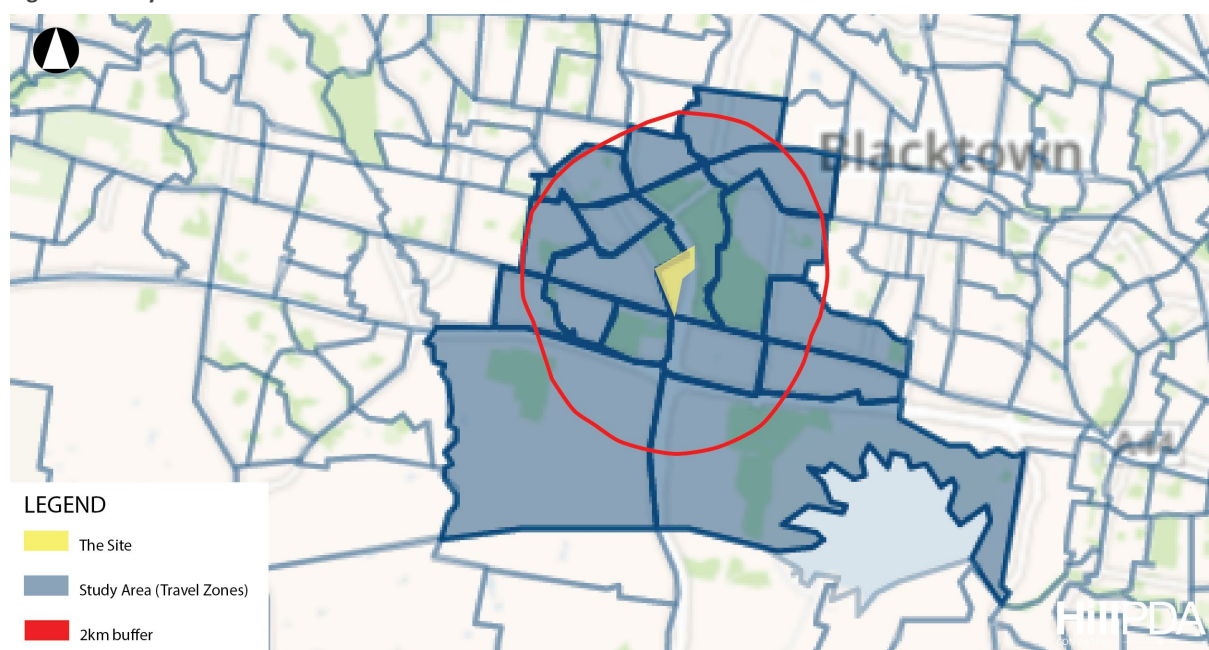
4.0 FUTURE GROWTH

New and expanded social infrastructure is required with population growth and with adjustments in the composition of the overall population in an area. This section examines likely levels of future growth in close proximity to the subject site and the socio-economic profile of the existing and future population.

4.1.1 Study area population and employment projections

The TPA provides population, employment and workforce projections. The TPA provides forecasts at a small area (travel zone) level for the Sydney Greater Metropolitan Area. For the purpose of this study, the study area has been selected to represent the projections within a two kilometre catchment from the subject site. The study area selected is identified in Figure 4.

Figure 4: Study area



Source: HillPDA adapted from BTS Travel Zone Explorer

The TPA forecast shows that the population of the study area will reach approximately 32,275 persons by 2026, representing an increase of approximately 72,869 persons or 10% over its 2016 base population projection of 29,406 residents.

Employment within the study area is forecast to increase significantly from 26,637 jobs to 36,991 jobs by 2026. This represents an increase of 10,354 jobs or 39% over the period. However the workforce within the study area is only forecast to increase by 10% (1,542) by 2026, indicating a high proportion of workers will travel from outside of the area to the area for employment.

Table 2 summarises the projected change in demographic indicators for the study area.

Table 2: Study area demographic projections

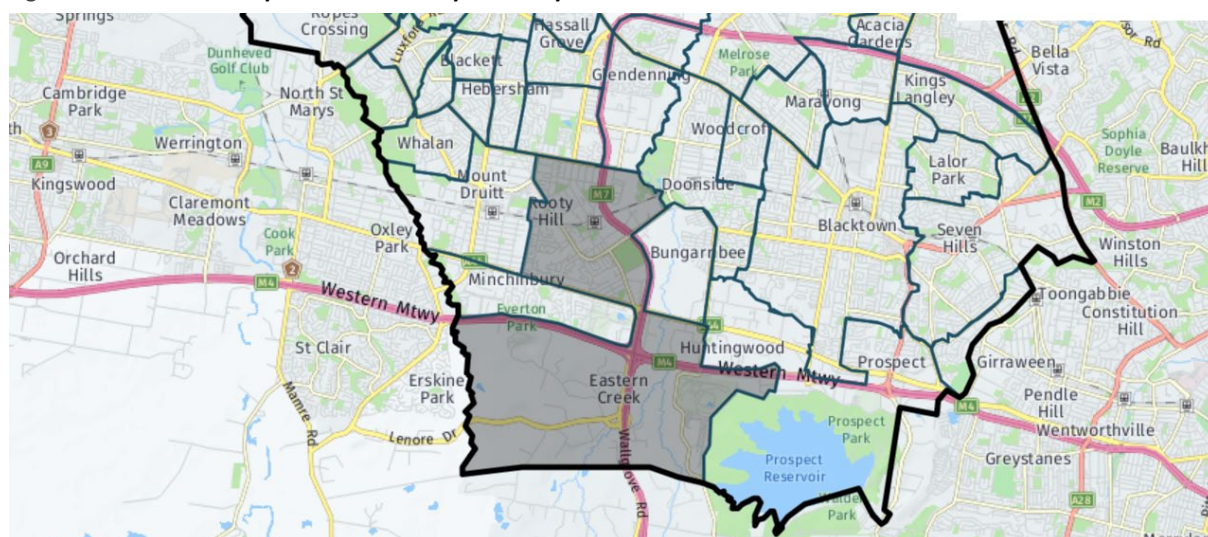
Category		2016	2026	Change	% Change
Study area	Population	29,406	32,275	2,869	10%
	Employment	26,637	36,991	10,354	39%
	Workforce	14,789	16,331	1,542	10%

Source: BTS Population and Employment Forecasts 2014

4.2 Forecast demographic characteristics

Population and household projections prepared for Blacktown City Council by Forecast.id provide an indication of the likely future characteristics of Rooty Hill - Eastern Creek future population. As identified in Figure 5, the boundary identified by Forecast.id is marginally different to the actual study area boundary. However, for the purpose of projecting demographics for the study area this difference in the boundary is insignificant.

Figure 5: Forecast.id Rooty Hill – Minchinbury Boundary



Source: Forecast.id

4.2.1 Projected age structure

Knowledge of the likely demographic breakdown is essential when planning for age related social infrastructure such as child care services.

Forecast.id has projected the age structure of the future population of the study area, this projected age structure is based on the current age of the population, migration (in and out), existing residential developments and anticipated amount and type of residential development.

In projecting the age structure of the future population of the study area, HillPDA has applied the age structure proportions for Rooty Hill - Eastern Creek as prepared for Blacktown City Council by Forecast.id to the proposed population predictions for Rooty Hill – Minchinbury SA2, as shown in the table below.

Table 3: Population projections by service groups for 2036

	%	Number
Babies and pre-schoolers (0 to 4)	7.0	2,259
Primary schoolers (5 to 11)	10.2	3,299
Secondary schoolers (12 to 17)	8.6	2,781
Tertiary education and independence (18 to 24)	9.4	3,040
Young workforce (25 to 34)	12.5	4,042
Parents and homebuilders (35 to 49)	18.7	6,048
Older workers and pre-retirees (50 to 59)	11.0	3,557
Empty nesters and retirees (60 to 69)	9.6	3,105
Seniors (70 to 84)	9.1	2,943
Elderly aged (85 and over)	3.7	1,197
Total persons	100	32,275

Source: Adapted from Forecast.id data

The population projections suggest:

- The study area is forecast to have significant population, employment and workforce growth (10%, 39% and 10% respectively)
- The proportion of children under 4 years (about 7%) would be high compared to Greater Sydney (4%) resulting in an additional 2,259 children, likely significantly increasing demand for child care in the locality
- The number of children of primary school age (5-11) predicted for Rooty Hill – Minchinbury SA2 accounts for almost 10% of the total persons, this is high compared to the Greater Sydney average of about 3%, likely increasing the demand for out of school care
- There will be significant growth (about 18%) among children of school going age (5-17) which would increase demand for primary and secondary schooling and active as well as passive recreation facilities.

EXISTING
SUPPLY

5.0 EXISTING SUPPLY

The following section provides an overview of the social infrastructure and open space located within the study area. This audit has been informed by a desktop analysis of geographical data and resources, including;

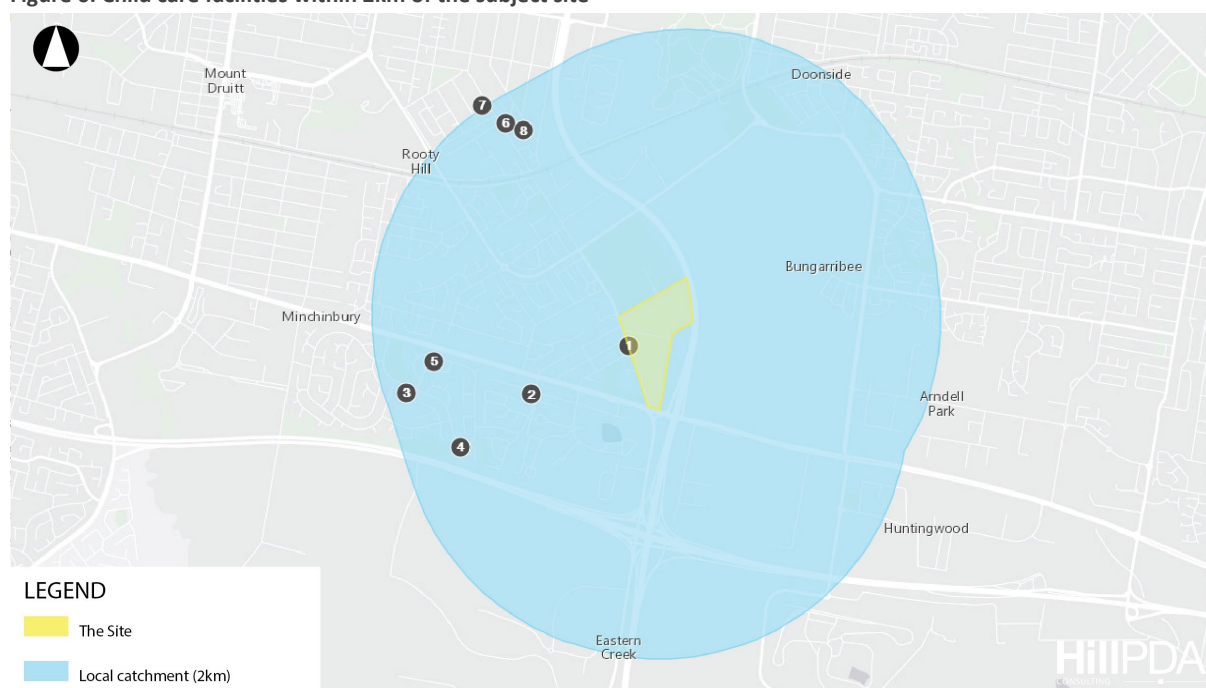
- Blacktown City Council website
- Core List Australia (2016)
- Careforkids.com.au (2017)
- NSW Department of Education and Communities My Child website
- ArcGIS Online.

The audit is indicative and based on the data available at the time of preparing this report.

5.1 Child care facilities

Currently there are eight child care facilities located within 2km of the subject site. At the time of this audit (January 2018), the majority of these centres were at capacity; however, two had a limited number of vacancies.

Figure 6: Child care facilities within 2km of the subject site



Source: HillPDA

Table 4: Child care facilities

Category	Sub-Category	Map ID	Facility Name	Address	Number of Places	Vacancies	Comment
Local facilities (located within 2km)							
Child care	Pre-school	1	Eastern Creek Public School Preschool	4 Durham Road, Schofields NSW 2762	40	No	
	Long Day Care	2	St Anthony's Early Learning Centre	28 Monica Avenue Hassall Grove, NSW 2761	47	Yes	No vacancy for 6 weeks to two years
		3	Maria Howey Child Care Centre	1 Florence Street, Oakhurst, NSW 2761	40	No	
		4	Goodstart Early Learning Quakers Hill	8 Bali Drive, Quakers Hill, NSW 2763	20	Yes	0-24 months not available
		5	Minchinbury Preschool & Nursery	9 Hollinsworth Road, Marsden Park, NSW 2765	46	Yes	No availability on Wednesday
		6	Jim Lynch Child Care Centre	46 Pelican Road, Schofields, NSW 2762	40	No	
		7	Colour UR Child's World Early Learning Centre	11 Yarramundi Drive, Dean Park, Sydney, NSW 2761	23	No	
		8	SDN Beranga Children's Education and Care Centre	25 Melanie Street, Hassall Grove, NSW 2761	49	No	

HillPDA has utilised Cordell Connect, an online database of development applications to determine the pipeline for child care developments. There are no child care centres planned within two kilometres of the subject site.

FUTURE REQUIREMENTS

6.0 FUTURE REQUIREMENTS

This section identifies the community facilities required to meet the projected population growth (identified in section 3) in the study area. There are a number of factors to consider when determining actual demand for child care facilities including:

- The forecast demographic characteristics of the Rooty Hill – Minchinbury SA2 and the locational characteristics of the catchment
- The likely needs of the community based on existing and projected demographic profile of the study area
- The capacity and adequacy of existing community facilities in the locality and region
- The application of appropriate benchmarks and rate of provision

This section also recommends approaches for the provision of the identified social infrastructure required to meet demand.

6.1 Standards of provision - benchmarking

Benchmarks act as a powerful tool in identifying supply and demand, forward planning and co-ordinating the provision of social infrastructure.

Table 5 identifies Blacktown City Council's released Section 94 Development Contribution Plans (CP No. 20, 21, 22, 23 and 24) standards of provision for child care delivery.

Table 5: Standards of Provision

Hierarchy	Social Infrastructure Type	Threshold	Source
Child care and education			
Local	Long day care	1 place: 5 children 0-4 years	BCC
	Out of school hours	1 place: 25 children 5-12 years	BCC

*BCC - Blacktown City Council - Section 94 Contributions

When planning for community infrastructure, it is necessary to develop/confirm a preferred facility response rather than simply applying an arbitrary benchmark. This can include embellishing and/or expanding existing facilities. Discussions with Blacktown City Council, NSW Department of Education and Communities (DEC) and NSW DP&E is recommended to further understand a preferred approach to the provision of facilities.

6.2 Existing child care demand

6.2.1 Residential demand

Blacktown City Council's benchmarks proposed for child care centres and long day care have been adopted. The population-based benchmark for child care is 1 place per 5 children aged 0-4 years and is supported by HillPDA. The ABS census 2016 indicates approximately 1,800 children are located within 2km of the subject site. Applying these projections indicates a demand for approximately 360 child care places.

Blacktown City Council's benchmark for out of school hours (OOSH) care indicates that one space should be provided for every 25 children aged 5-11 years. As identified in section 4, the study area as per 2016, contained approximately 2,402 children aged between 5-11 years, therefore triggering a demand for 96 OOSH places.

As identified in section 4 the child care audit indicates the child care centres within 2km of the subject site have the ability to accommodate 305 children, however the majority of centres are currently at capacity and are unable to meet existing demand.

6.3 Future child care demand - 2026

6.3.1 Residential demand

Based on the population projections identified in section 4 the population within the study area is expected to grow by approximately 10%. As previously mentioned, the assumption is made that 7% of the future population would comprise of children aged between 0-4 years which indicates approximately 2,259 children would reside within two kilometres of the subject site. This would result a demand for approximately 452 child care places by 2026.

The study area is also predicted to contain 2,781 children aged between 5-11 years, therefore triggering a demand for 111 OOSH places.

The child care audit indicated that child care centres within 2km of the subject site can currently accommodate 305 children. However, majority of child care centres in the area are at capacity and would not be able to accommodate the additional population growth.

Therefore, there is expected to be a demand for an additional 147 child care places and 111 OOSH places by 2026 for local residents alone.

6.3.2 Workforce and employment demand

As identified in the Draft Child Care Planning Guideline¹, there is a demand for quality child care in locations close to jobs. Locating child care centres in locations of high employment increases the opportunity for parents to participate in employment which benefits their quality of life and economy and encourages healthy child development.

As identified in Chapter 6, employment within the study area is forecast to increase significantly from 26,637 jobs to 36,991 jobs by 2026. This represents an increase of 10,354 jobs or 39% over the period. However, the workforce within the study area is only forecast to increase by 10% (1,542) by 2026, indicating a high proportion of workers will travel to the area for employment.

The proposed child care facility is well located to service workers traveling to the area for employment.

6.4 Recommendations

We note that whilst local government has historically been involved in the provision of child care services, local government plays a diminishing role in this sector. It is recommended that Blacktown City Council should support the private sector to meet this demand.

HillPDA recommends that one large child care centre with the capacity for 100 to 110 children be located within the Eastern Creek Business Hub Precinct.

¹ Draft Child Care Planning Guideline, NSW Department of Planning & Environment 2017

CONCLUSION

7.0 CONCLUSION

This report has considered the demand for community facilities and open space provisions to service an expected population. It also examined the current context with respect to child care facilities within close proximity to the subject site (2km) to determine future requirements and make recommendations for future provision.

HillPDA has prepared the requirements based on the future population projections and the application of BCC's recommended rates of provision. This assessment has incorporated other indicators of need for child care, such as a review of the demographic data and information on existing and potential future provision for child care within close proximity to the subject site.

We note that whilst local government has historically been involved in the provision of child care services, local government plays a diminishing role in this sector. It is recommended that Blacktown City Council should support the private sector to meet this demand.

HillPDA recommends that one large child care centre with the capacity for approximately 100 to 110 children to be located within the Eastern Creek Business Hub Precinct.

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