



Hurstville City Council
Market Assessment/Needs Analysis Report
December 2015

Contents

Key Contacts.....	2
1. Executive Summary	3
2. Introduction	5
3. Site Background	7
4. Demographic Analysis.....	9
5. Residential Aged Care Competition Analysis.....	21
6. Appendix One – Glossary.....	25
7. Appendix Two – Catchment Area Suburb/Town Listing.....	26
8. Appendix Three – Median House Price Listing by Suburb.....	27
9. Appendix Four – Existing Aged Care	29

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1. Executive Summary

Background

Ansell Strategic was engaged to assist the Hurstville City Council (“HCC”) with the evaluation of the demand for aged care/retirement living services. The proposed site for aged care/retirement living services was previously the Oatley Bowling Club and is owned by the Council. The site is not currently zoned to allow the development of residential aged care services. Reclassification and rezoning of the site would be required to develop residential aged care services on the site under the Hurstville Local Environment Plans (LEP) 2012.

Ansell Strategic has previously reviewed the existing consultancy work undertaken to date and provided recommendations on the suitability of the site for aged care/retirement living services.

Our initial review indicated that the site presents a sound development opportunity and is within close proximity to public transport, local services and amenities. Preliminary market analysis suggests that there is likely to be strong demand for aged care or retirement living services. However, given restrictions to the developable area for residential or seniors housing due to bushfire exposures on the site, the ability to develop a viable retirement village would be difficult. Taking these considerations into account and our analysis of the site, we recommended the use of the site for a high quality residential aged care (nursing home).

As requested by HCC, Ansell Strategic has undertaken a detailed review of the potential demand and market need for residential aged care services surrounding the proposed site in Oatley.

Market Assessment Findings

Our detailed analysis of the demographics within the catchment area confirms that there is currently a large proportion of ageing residents in the immediate area surrounding Oatley and the wider catchment area. Further, population forecasts for the catchment area expect this to continue to increase above state and national averages, indicating that there is likely to continue to be demand for aged care services in the longer term.

Median house prices within the catchment area suggests that there is a high level of asset wealth. Further, median house price data indicates that the local elderly population would be able to afford a higher quality service offering.

A review of the local competitor market indicates that local residents within the immediate area will be underserved by residential aged care options. Within the immediate area, residential aged care options are very limited with services either catering to a specific cultural or social group, or are dated aged care facilities. Our analysis of current competition indicates that nearly 90% of the residential aged care services (51 facilities) in the defined catchment area are located in the secondary and tertiary areas. While there are some new services in the secondary and tertiary catchment areas the majority of the options are older stock. Within the immediate area, residential aged care options are limited with services either catering to a specific cultural or social group, or are dated aged care facilities.

Analysis of emerging competition also suggests that there are very limited new services being developed. While some existing providers have been able to expand their current operations,

the combination of emerging competition and expanded current service offerings will not sufficiently meet the demand for aged care services within the area.

Based on our review of the existing consultancy work undertaken, assessment of the site and detailed market analysis, the proposed site offers significant potential to develop residential aged care services to cater for unmet demand in the area. As such, we confirm that the Council should proceed with rezoning the site to enable the site to be developed for residential aged care services.

2. Introduction

Project Scope

HCC has been exploring the feasibility of developing aged care and/or retirement living services. The proposed Council owned site is located at the former Oatley Bowling Club and if deemed suitable for aged care, will require rezoning.

The Council engaged Ansell Strategic to assist in providing a detailed market assessment analysis to HCC to support a Planning Proposal to rezone and reclassify the site for a mixed use seniors housing/residential aged care and residential development.



3. Site Background

3. Site Background

Former Oatley Bowling Club

The proposed site was previously the location of the Oatley Bowling Club. The site is approximately 11,100m² and currently zoned as RE1 Public Recreation under the Hurstville LEP 2012 and classified as 'community land' under the Local Government Act 1993. For the development of mixed use seniors and residential housing to be possible, rezoning and reclassification of the site will be required under the Hurstville LEP 2012.

The development potential of the site for residential aged care is significantly constrained due to larger bushfire asset protection zones for aged care/seniors accommodation developments. This limits the developable area of aged care/seniors housing buildings for habitable use to 2,032m² of the 11,000m² site.

Topographically, the site is flat in the northern section where the previous lawn bowling pitches were located. The pitches vary in elevation and are enclosed by a retaining wall that runs along River Road. From the bowling green pitches, there is a relatively steep fall in gradient from the north-east side towards the south west end into the Myles Dunphy Bushland Reserve.





4. Demographic Analysis

4. Demographic Analysis

Demographic Analysis

Overview

Ansell Strategic has undertaken population demographic analysis based on identified community profiles of the surrounding area. Population demographics are useful in establishing a target market to understand the potential demand levels for retirement living accommodation.

Demographic Analysis Methodology

There is significant research that demonstrates that the vast majority of residents entering care have either lived or have immediate family that live in the area. Typically, a 5 kilometre radius surrounding the site is established to define the catchment area.

Based on these considerations, Ansell Strategic has defined a catchment area surrounding the suburb of Oatley to analyse the demographic profiles and competition in the area. The catchment area has been separated into three distinct sub-groups (primary, secondary and tertiary) and represent preferences towards the site from greatest to least respectively (please refer to Appendix Two for a full listing of suburbs).

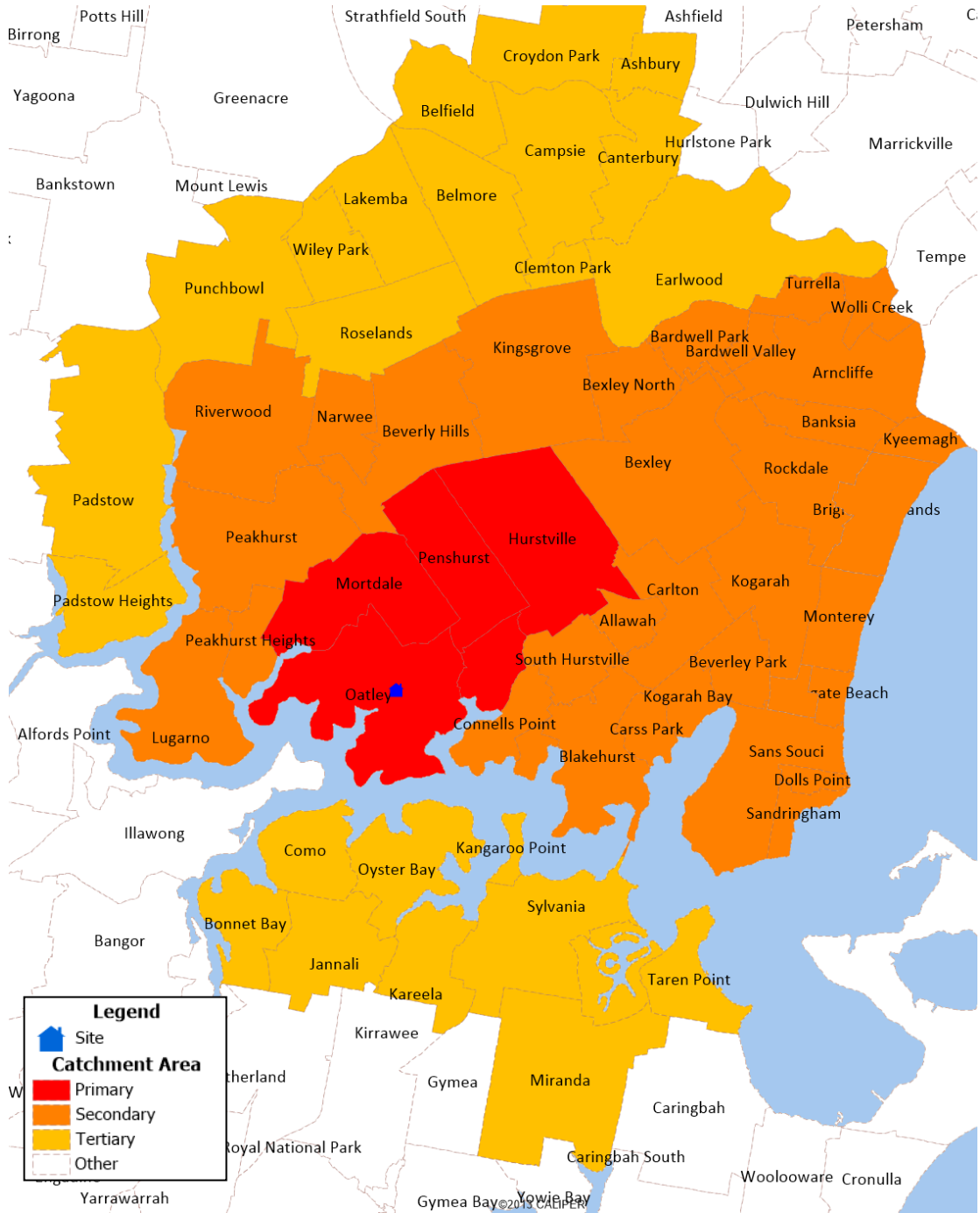
Our analysis also incorporates the Statistical Area Level 2 (SA2) of 'Oatley-Hurstville Grove' and Local Government Areas (LGA) which comprise the St George Region (City of Hurstville, City of Kogarah and City Rockdale) to gain additional insight into catchment area localities.

Catchment Area

The catchment areas have been defined as:

Catchment Group	
Primary	Suburbs where the site is located and adjoining the immediate catchment area
Secondary	Suburbs east and west adjoining the primary catchment area
Tertiary	Outer suburbs of the entire catchment area (north of the site and south of Georges River)

Catchment Area



Source: Maptitude by Caliper

Catchment Area Dynamics

Oatley is located approximately 18 kilometres south of central Sydney and situated within two local municipalities – the Hurstville City Council and City of Kogarah. The former Oatley Bowling Club site is centrally located within the suburb of Oatley.

The suburb is bound by Boundary Road and Judd Street in the north, Moore Reserve and Renown Park in the east, Oatley Heights Park in the west and Georges River in the south. There are also a number of bays in Oatley created along the Georges River such as Lime Kiln Bay, Jew Fish Bay, Gungah Bay and Oatley Bay. The Illawarra railway line runs through the centre of Oatley with the former Oatley Bowling Club site situated just west of the Oatley Station. Oatley is only connected to the suburbs south of Oatley (across the Georges River) through the Como Bridge (pedestrian access only) and the Illawarra train line.

The suburb predominately comprises of mixed residential buildings and the location of the site presents strong development potential. To the east of the site (across the railway line) is the suburbs main retail and commercial district along Oatley Avenue and Fredrick Street. There are also a number of services and amenities located west of the former bowling club site along Mulga Road. These areas contain a variety of services that include cafes, restaurants, community services and larger retailers.

The site is close to the Mortdale Medical Practice and within short distance to private hospitals including, Waratah Private Hospital, Hurstville Private Hospital and St George Private Hospital. The former Oatley Bowling Club site is also within short driving distance to the Calvary Health Care Sydney public hospital. The wider catchment area is well serviced by general practitioners, specialist doctor rooms, allied health practitioners and pharmacies.

In Oatley the majority of occupied dwellings are separate houses and this is similarly reflected in the SA2 region. The proportion of separate housing is relatively higher compared to the wider local municipalities and state and national figures.

Local Dwelling Types

Dwelling Structure	Oatley (No.)	Oatley (%)	Oatley – Hurstville Grove (SA2) (%)	NSW (%)
Separate house	2,610	73.0	77.2	69.5
Semi-detached, row or terrace house, etc.	281	7.9	5.5	10.7
Flat, unit or apartment	643	18.0	17.0	18.8
Other dwelling	40	1.1	0.2	0.9

Source: ABS 2011 Census Population and Housing

Local Dwelling Types (by Local Municipality and Australia)

Dwelling Type	Hurstville City Council (LGA) (%)	City of Kogarah (LGA) (%)	Australia (%)
Separate house	59.0	56.4	75.6
Semi-detached, row or terrace house, etc.	12.3	8.4	9.9
Flat, unit or apartment	28.2	34.8	13.6
Other dwelling	0.5	0.4	0.9

Source: ABS 2011 Census Population and Housing

The Target Age

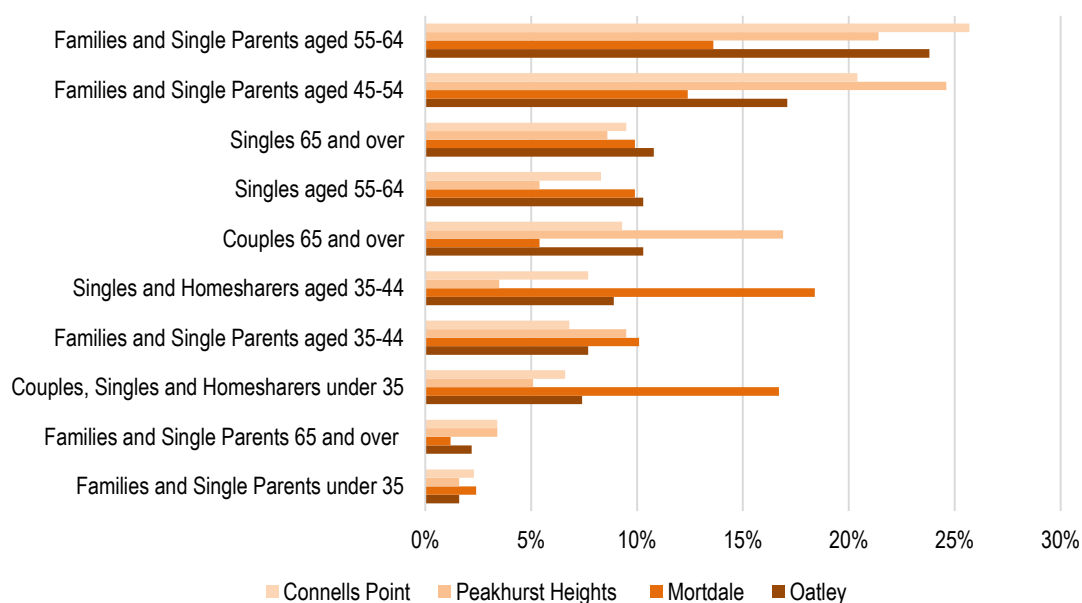
Industry research indicates that residents are entering residential aged care later in life. At June 30, 2014, 93% of residents in permanent and respite aged care were aged at least 70 years. The vast majority (77%) are aged over 80 years. The average admission age was 84 years.

With this in mind, our analysis of the local population who may be seeking residential aged care focuses on local residents who are 85 years and older. When looking at future markets, we examine the demographics of local residents who are aged 75 and over.

The Existing Aged Population

Our research indicates that the population in Oatley is a relatively established suburb with 40% of the population comprising of families and single parents aged between 45 to 64 years. There are also a significantly large proportion of singles and couples aged 65 years, comprising of approximately 21% of the population. Of this group, 52% are singles aged 65 years and over. Similar characteristics are observed in the adjoining suburbs of Peakhurst Heights, Connells Point and Mortdale.

Demographic Profile – Immediate Area



Source: Mosaic demographic data

Within the primary catchment area, the number of people aged 75 years and above accounts for approximately 6.9% of this catchment groups total population. This is higher than both the state average and national average of 5.4% and 6.4% respectively. Of interest, there is a particularly high concentration of people aged 75 and above within the immediate suburb of Oatley (9.4% of the total population), suggesting potential demand in the direct area.

Analysis of Hurstville City and City of Kogarah indicates there are 6,376 and 3,309 people aged 75 years and above in the respectively. This represents approximately 8% and 7% of the total population for each LGA. The proportion of older residents aged 75 years and above in Hurstville City and City of Kogarah is consistent with, or higher than our analysis of the primary

catchment area, indicating that the wider catchment contains a large older population base that will require residential aged care services.

Population statistics for residents aged 85 years and above for the primary catchment area indicated similar results to the 75 years and above age group. Residents aged 85 years and above in the primary catchment account for 2.2% of the population. This is slightly larger than the state (2%) and national (1.9%) averages. Our analysis indicates there are approximately 1,344 people aged 85 years and over in the immediate area. In line with trends observed in our analysis of people aged 75 years and above, the population of people aged 85 years and above within the local municipalities of Hurstville City and City of Kogarah (2.7% and 2.2% of the total population) represents evidence that there is likely to be sufficient demand for residential aged care services.

Local Population Aged 75+ and 85+ Years

Suburb	Total Population	Population 75+	Population 75+ (% of Total Population)	Population 85+	Population 85+ (% of Total Population)
Oatley	10,097	946	9.4%	340	3.4%
Penshurst	11,692	790	6.8%	252	2.2%
Hurstville	26,039	1447	5.6%	451	1.7%
Mortdale	9,700	665	6.9%	259	2.7%
Hurstville Grove	2,392	160	6.7%	42	1.8%
Total	59,920	4,008	6.7%	1,344	2.2%

Source: ABS Census Data 2011

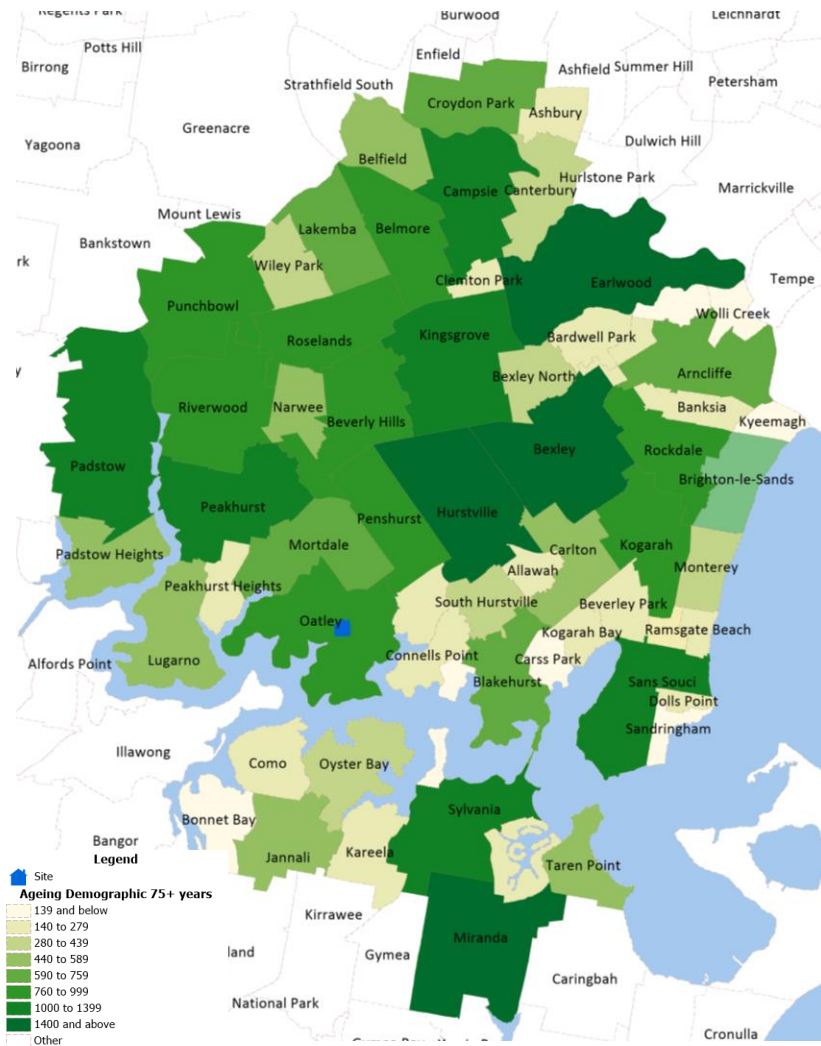
People aged 75 years and over residing in the secondary and tertiary areas suggest further favourable market potential. In the secondary catchment area, 8.2% of the population is aged 75 years and above. The suburbs of Peakhurst, Sans Souci and Bexley contain the largest number of older people aged above 75 years in the secondary catchment area, comprising of 11% (1,066), 8.7% (1,664) and 13.2% (1,312) respectively.

The tertiary catchment area contains similar but a slightly smaller proportion of ageing people compared to the secondary catchment area. Residents aged 75 years and over comprises of 7.1% of the population and people aged 85 years and above accounts for 2% of the total population. Earlwood and Miranda are some of the suburbs in the tertiary catchment area that contain the largest concentration of people aged 75 years and over (1,522 and 1,593 people respectively).

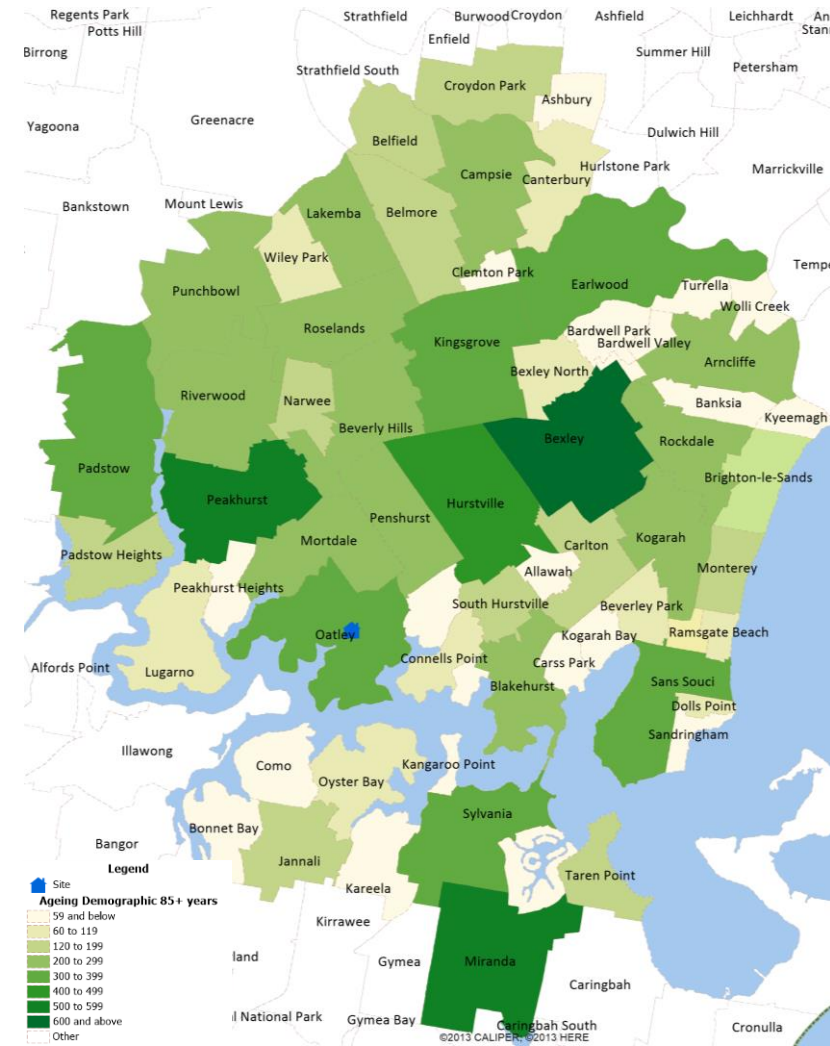
Our analysis of the current population demographics indicates that there is a sufficient number of older residents living to sustain a residential aged care development within the immediate area. In addition, there are also large numbers of prospective residents living in the wider catchment area that are likely to require aged care services.

There is a large pool of prospective residents within the immediate and wider catchment area. Given this, there appears to be a large population of older residents that could sustain the development of an aged care facility at the proposed site in Oatley.

Population aged 75 years and over



Population aged 85 years and over



Future Population Demographics

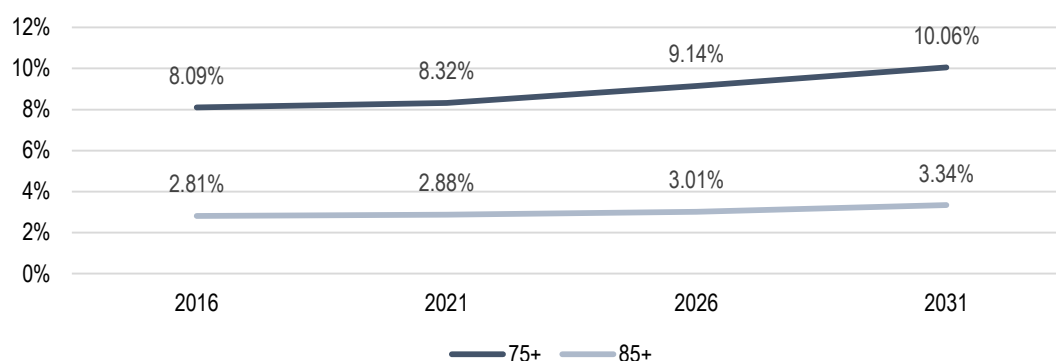
Australia will soon experience a significant shift in the aged demographic profile of its population with the emergence of the baby boomer generation and relatively low birthrates.

According to ABS projections the ageing population will grow substantially over the next forty years with the population of Australians aged 70 or over expected to be in excess of 8 million, or 22.58% of the total population, by 2050.

The overall increase in the ageing population can largely be attributed to the rapid population growth during the baby boom period of 1947 to 1964. The aged population growth is also a result of increased longevity, with males born in 2010-2012 expected to live around 25 years longer than those born between 1901 and 1910 and females born between 2010 and 2012 expected to live around 26 years longer than their 1901-1910 counterparts. The average life expectancy is estimated to increase by 3 years in 50 years' time.

In Hurstville City LGA, the number of residents aged 75 years and over is forecast to increase by more than 29% in the next ten years. From 2016 to 2026, the population aged 75 years and above within Hurstville City LGA is expected increase from 7,050 to 9,100. This is significantly higher than the forecast growth for New South Wales and Metropolitan Sydney over the same period and age group (13% and 17% respectively). For the same ten year period and age group, the City of Kogarah is also expected to increase by 34% (4,350 to 5,850) and City of Rockdale by 17% (8,650 to 11,350).

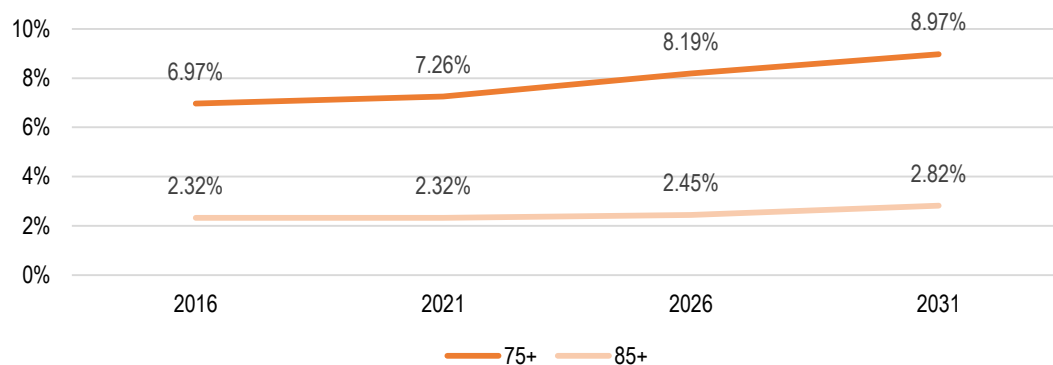
Percentage of 75+ & 85+ Residents in Hurstville City (LGA) (2016-2031)



Source: The NSW Department of Planning and Environment Population Projections (2014)

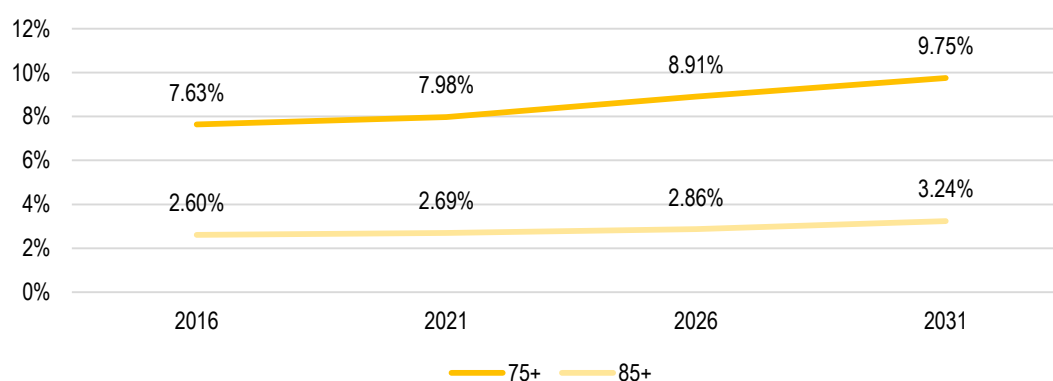
The rise in the number of local residents aged 85 years and over in the Hurstville LGA is also expected to follow a similar trend to the 75 years and over group from 2016 to 2026 (2,450 to 3,000). Growth projections for residents aged 85 years and over in the surrounding local government areas are also consistent with population trends for the 75 years and above age group. From 2016 to 2026, City of Kogarah and City of Rockdale are expected to experience 21% and 24% increase in residents aged 85 years and over respectively. This is higher than expected New South Wales and National forecasts of 14% and 17% respectively.

Percentage of 75+ & 85+ Residents in City of Kogarah (LGA) (2016-2031)



Source: The NSW Department of Planning and Environment Population Projections (2014)

Percentage of 75+ & 85+ Residents in City of Rockdale (LGA) (2016-2031)



Source: The NSW Department of Planning and Environment Population Projections (2014)

The population of older people in the wider catchment area will continue to grow over the next 15 years demand levels for residential aged care surrounding the former Oatley Bowling Club site is expected to rise.

Property Prices

Ansell Strategic reviewed median property prices within the catchment area to determine relative wealth and provide an indication of the local market's tolerance to higher accommodation fees. Please see Appendix Three for a full listing of suburb median house price values.

The suburb of Oatley has a median house price of \$1,406,000 at December 2015 and is above the above average median house price values for the primary catchment area (\$1,317,600). Median property prices of other suburbs within the primary catchment area are consistent with the prices observed in Oatley, ranging between \$1,120,000 and \$1,450,000. This suggests that local residents within the immediate and surrounding area have asset wealth that would be able to support generous entry contributions.

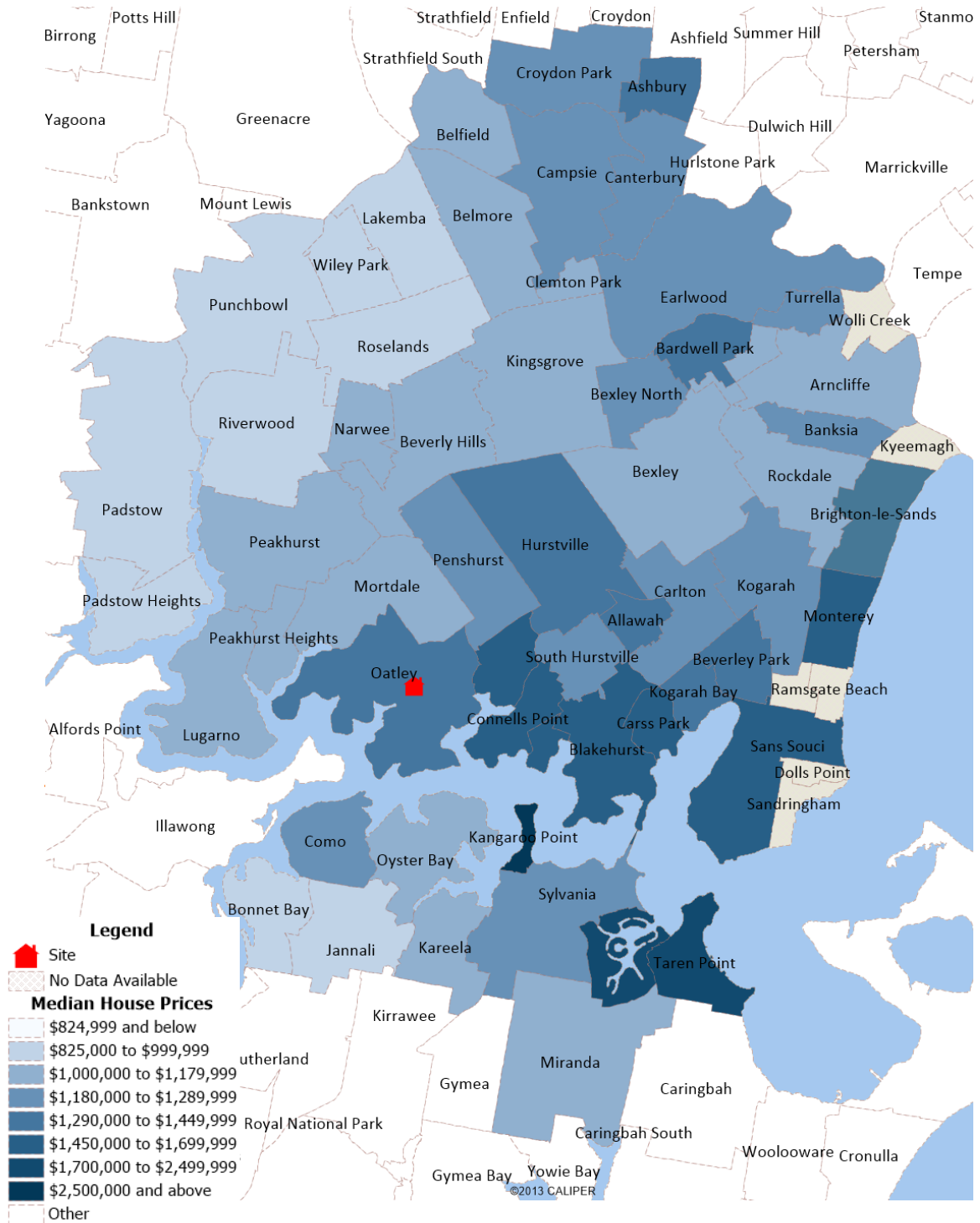
In the wider catchment area, the average median house price ranges from \$825,000 (Wiley Park) to \$2,500,000 (Kangaroo Point). Similar to the primary catchment area, the secondary catchment area indicates similar asset wealth levels. The average median house price in the secondary catchment is \$1,252,700 and ranges between \$939,000 (Riverwood) and

\$1,600,000 (Connells Point), similarly suggesting that suburbs within this catchment contain residents with high levels of asset wealth and the capacity to afford residential aged care in a contemporary environment.

While there is a larger variance in median house prices within the tertiary catchment area, the average median house price is comparatively similar at \$1,205,000. Median house prices range between \$825,000 (Wiley Park) to \$2,500,000 (Kangaroo Point) also indicating that large numbers of residents living in suburbs in the wider catchment area have the capacity to pay premium pricing for quality aged care offerings.

Our analysis of property pricing surrounding the former Oatley Bowling Club site suggests there is a high level of asset wealth. This suggests that local residents generally live in comfortable surroundings and have the asset wealth to pay entry contributions required in a high-end facility is developed on the site.

Primary Catchment House Prices (\$)

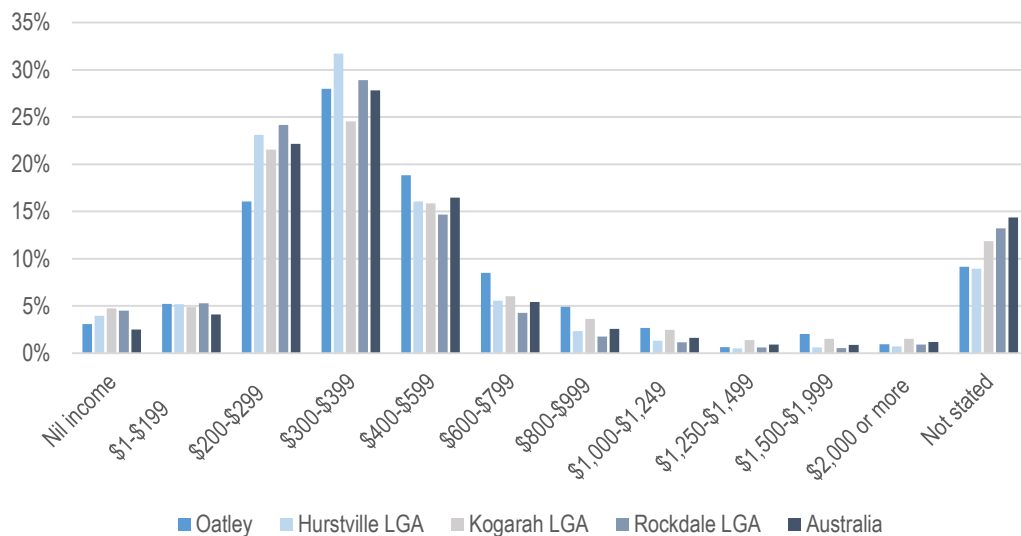


Source: Corelogic / ABS (December 2015)

Income & Wealth Analysis

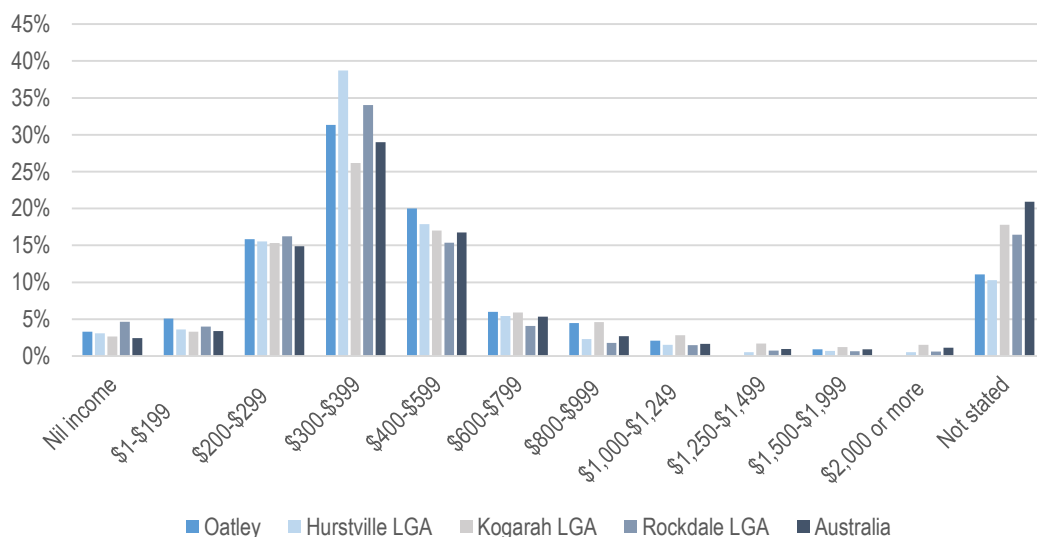
To further understand the level of wealth in the area, Ansell Strategic analysed income levels of the catchment area. The income level of people aged 75 years and above and 85 years and above in the suburb of Oatley, City of Hurstville LGA, City of Kogarah LGA and City of Rockdale LGA is in line with the national population. Consistent with our analysis on median property prices above, it is likely that residents within the area would have the capacity to afford quality residential aged care services.

Total Personal Income (Weekly) Population aged 75 years and over



Source: ABS 2011 Census Population and Housing

Total Personal Income (Weekly) Population aged 85 Years and over



Source: ABS 2011 Census Population and Housing

An analysis of income levels and tenure type in the catchment area, indicates that the level of wealth in the area is comparable to state and national levels.



5. Competition Analysis

5. Residential Aged Care Competition Analysis

Competitor Overview

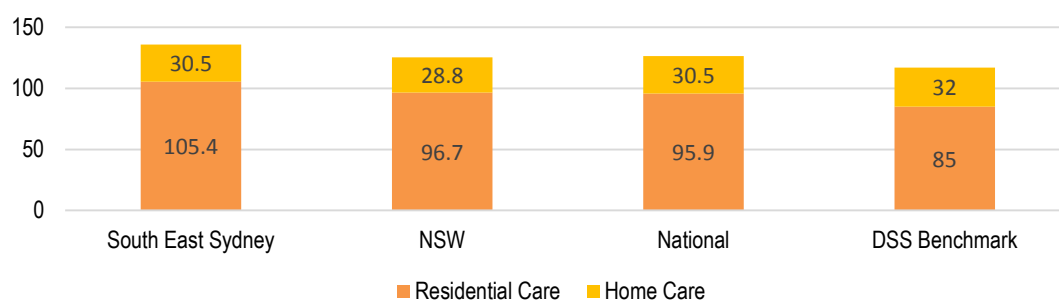
In the catchment area there are currently 57 residential aged care facilities offering a total of 5,125 beds. Although there are a large number of existing facilities within the entire catchment area, nearly 90% of these facilities are located in the secondary and tertiary catchment area. More than 50% (29 facilities) are situated in the secondary catchment area providing 2,217 places. There are only 6 facilities offering 521 in the primary catchment area with the remaining 22 facilities (2,387 beds) situated in the tertiary catchment.

Analysis of the proportion of residential aged care beds to people within each suburb indicates that the suburbs of Bexley, Peakhurst, Lakemba, Banksia and Padstow Heights contain a high proportion of aged care beds to the current resident population. This is in contrast to Oatley and suburbs surrounding the site which provide a relatively lower proportion of beds to older residents.

Our analysis suggests that the number of residential aged care services within Oatley and the immediate adjoining suburbs is low. Competition is predominately located in the secondary and tertiary catchment areas, north and east of the proposed site and concentrated to a number of suburbs.

As at June 2015 there were 105.4 residential aged care places allocated per 1,000 people aged 70 years and over in the South East Sydney aged care planning region. This represents a marginal increase compared to the previous period (105.1 residential aged care places per 1,000 people aged 70 years and over as at June 2014). As previously mentioned, although the allocation of places within the South East Sydney aged care planning region is higher than State, National and benchmark figures, our competition analysis indicates there is an absence of residential aged care facilities surrounding the immediate area of Oatley.

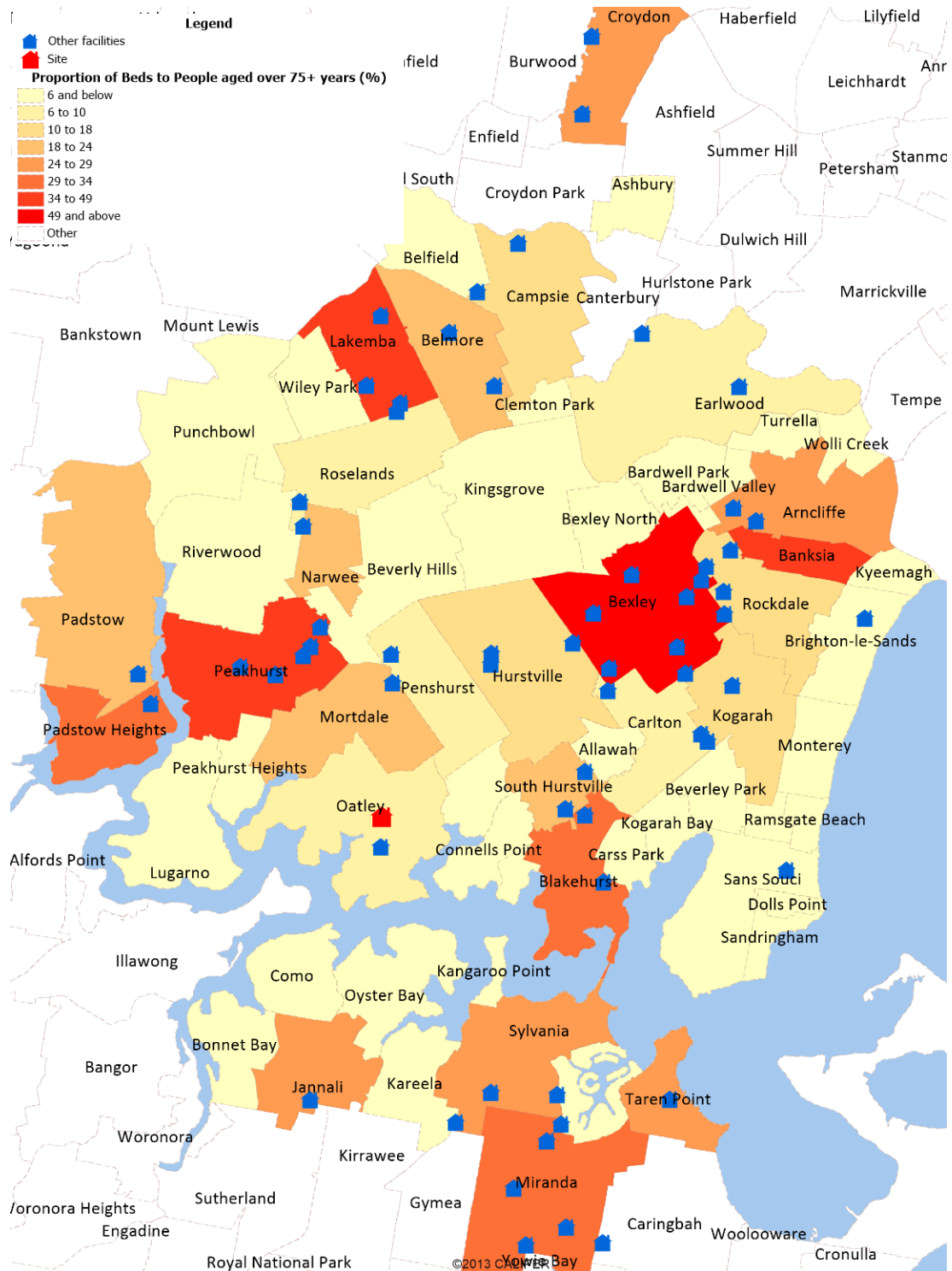
Allocation of Places per 1,000 People Aged 70 and Over (at June 30, 2015)



Source: DSS Aged Care Stocktake

Whilst there are a number of competitors in the suburbs surrounding the former Oatley Bowling Club site, they are predominately located within the secondary and tertiary catchment areas. Services in the immediate catchment area either cater to a specific cultural or social group or are older service offerings. Although there some new services within the wider catchment area, most homes are older and offer traditional nursing home accommodation. There is still likely to be potential unmet demand for modern quality residential aged care services.

Existing Residential Aged Care Competition



Source: DSS Aged Care Stocktake, DPS Guide, myagecare, Mystery Shopper, Aged Care Online

Emerging Residential Aged Care Competition

Our research has not revealed any new developments in the immediate area of Oatley.

Our review of the Aged Care Approval Rounds (ACAR) revealed two providers in the catchment area expecting to develop new services. In the secondary catchment area, St Basil's was developing a new residential aged care facility, however, a fire in 2013 has delayed its development. As a result the organisation expects there to be long delays with the completion of this facility. St Basil's were granted 117 places in the 2012/2013 ACAR. The other provider intending to develop a new service is the Sisters of Lady China of Health Care Pty Ltd.

Between the 2011 to 2014 ACAR, many of the places granted relate to existing service providers within the catchment area. In 2014, there were a combined total of 70 places provided amongst 4 existing providers. None of the service providers that have been allocated places within the 2011-2014 ACAR are located within the primary catchment area.

As detailed in our initial report, discussions with the Council did not indicate any new developments being approved.

Further to our review of the ACAR and discussions with the Council, we still predict that additional competitors will enter the local area as the population ages. We also expect that existing competitors will renew stock as the market increasingly demand newer, higher quality accommodation and services.

Emerging competition will not provide sufficient beds with quality service offerings to meet the needs of ageing residents the immediate area.

Emerging Competition

ACAR	Provider	Service Name and Address	Places	Distance to site (approx.)
2014	Anglican Retirement Villages	Mary Andrews Retirement Village Hostel 857-861 King Georges Road, SOUTH HURSTVILLE NSW 2221	8	3.9km
	Kenna Investments Pty Ltd	Endeavour Nursing Home 74-76 Rocky Point Road, KOGARAH NSW 2217	18	6.7km
	Kenna Investments Pty Ltd	Eddystone Nursing Home 3-5 Eddystone Road, BEXLEY NSW 2207	25	6km
	Moran Australia (Residential Aged Care) Pty Limited	Moran Sylvania 29 Sylvania Road, SYLVANIA NSW 2224	19	10km
2012/2013	Homewood Care Pty Limited	Homewood Gardens 60-68 Regent Street, BEXLEY NSW, 2207	6	5.5km
	Kenna Investments Pty Ltd	3-5 Eddystone Road, BEXLEY NSW, 2207	50	6.6km
	Majestic Health Aged Care Pty Ltd	18-20 Garden Street, KOGARAH NSW, 2217	5	5.9km
	St Basil's Homes	New Service - 2012 - St Basils - Bexley 62-82 Harrow Road, BEXLEY NSW, 2207	117	7.1km
	The Sisters of Our Lady of China Health Care Pty Ltd	New Service - 2012 - The Sisters of Our Lady of China Health Care Pty Ltd, 151-157 Rocky Point Road, BEVERLEY PARK NSW, 2217	20	7.2km
2011	Blakehurst Aged Care Services Pty Ltd	Blakehurst Aged Care Centre 20 Cheddar Street BLAKEHURST NSW 2221	11	4.1km

Source: ACAR 2011, 2012/13, 2014

6. Appendix One – Glossary

ABS – Australian Bureau of Statistics

ACAR – Aged Care Approval Round

HCC – Hurstville City Council

LGA – Local Government Area

LEP – Local Environment Plans

NSW – New South Wales

RAD – Refundable Accommodation Deposit

SA2 – Statistical Area 2

7. Appendix Two – Catchment Area Suburb/Town Listing

Primary	Secondary		Tertiary	
Oatley	Kogarah	Kyeemagh	Punchbowl	Jannali
Penshurst	Beverley Park	Rockdale	Roselands	Sylvania
Hurstville	Carlton	Banksia	Wiley Park	Sylvania Waters
Mortdale	Kogarah Bay	Arncliffe	Lakemba	Miranda
Hurstville Grove	Carss Park	Wolli Creek	Belmore	Taren Point
Beverly Hills	Sans Souci	Bexley	Earlwood	Como
	Allawah	Bexley North	Campsie	Oyster Bay
	Blakehurst	Kingsgrove	Clemton Park	Bonnet Bay
	South Hurstville	Turrella	Belfield	Kangaroo Point
	Connells Point	Bardwell Park	Croydon Park	Kareela
	Kyle Bay	Narwee	Padstow	Ashbury
	Sandringham	Peakhurst	Padstow Heights	Canterbury
	Dolls Point	Riverwood		
	Ramsgate Beach	Peakhurst Heights		
	Monterey	Lugarno		
	Brighton-Le-Sands	Bardwell Valley		
	Ramsgate			

8. Appendix Three – Median House Price Listing by Suburb

Primary		Secondary		Tertiary	
Suburb	Median House Price	Suburb	Median House Price	Suburb	Median House Price
Oatley	\$1,406,000	Beverly Hills	1,125,000	Punchbowl	\$855,000
Penshurst	\$1,252,000	Kogarah	1,270,000	Roselands	\$927,000
Hurstville	\$1,360,000	Beverley Park	\$1,357,500	Wiley Park	\$825,000
Mortdale	\$1,120,000	Carlton	\$1,236,000	Lakemba	\$981,000
Hurstville Grove	\$1,450,000	Kogarah Bay	\$1,305,000	Belmore	\$1,088,000
		Carss Park	\$1,455,000	Earlwood	\$1,266,500
		Sans Souci	\$1,480,500	Campsie	\$1,225,000
		Allawah	\$1,290,000	Clemton Park	\$1,150,000
		Blakehurst	\$1,561,000	Belfield	\$1,112,500
		South Hurstville	\$1,239,000	Croydon Park	\$1,212,500
		Connells Point	\$1,600,000	Padstow	\$895,000
		Kyle Bay	\$1,517,500	Padstow Heights	\$900,000
		Sandringham	-	Jannali	\$950,000
		Dolls Point	-	Sylvania	\$1,210,000
		Ramsgate Beach	-	Sylvania Waters	\$2,050,000
		Monterey	\$1,493,000	Miranda	\$1,063,500
		Brighton-Le-Sands	\$1,270,000	Taren Point	\$1,790,000
		Ramsgate	-	Como	\$1,200,000
		Kyeemagh	-	Oyster Bay	\$1,057,500
		Rockdale	\$1,130,000	Kangaroo Point	\$987,500
		Banksia	\$1,185,000	Kareela	\$2,500,000
		Arncliffe	\$1,122,500	Ashbury	\$1,090,000
		Wolli Creek	-	Canterbury	\$1,400,000

Primary		Secondary		Tertiary	
		Bexley	\$1,080,000		
		Bexley North	\$1,210,000		
		Kingsgrove	\$1,161,940		
		Turrella	\$1,262,500		
		Bardwell Park	\$1,300,000		
		Narwee	\$1,150,000		
		Peakhurst	\$1,020,000		
		Riverwood	\$939,988		
		Peakhurst Heights	\$1,085,000		
		Lugarno	\$1,112,500		
		Bardwell Valley	\$1,117,500		

Source: Corelogic / ABS

9. Appendix Four – Existing Aged Care

Existing Residential Aged Care Competition

Suburb	Site	Provider	Beds
Primary Catchment			
Oatley	Ark Health Care Oatley	Ark Health Care	80
Penshurst	Fairlea Aged Care	Fairlea Aged Care @ Penshurst	72
Hurstville	Regis Gannon Gardens	Regis Aged Care	110
Hurstville	Lucy Chieng Aged Care Centre	ANHF	70
Hurstville	Shangri-la Nursing Home	Utopia Aged Care	53

Suburb	Site	Provider	Beds
Secondary Catchment			
Kogarah	Bethlehem House	Catholic Healthcare	32
Kogarah	The Laurels Hostel	UPA Sydney South Region	27
Kogarah	Majestic Health Aged Care	Majestic Health Aged Care	54
Mortdale	Ferndale Gardens Aged Care Facility	Trinity Management Services	136
Carlton	Botany Garden Nursing Home	Botany Gardens Nursing Home	42
Sans Souci	Thomas Holt Sans Souci Gardens	Thomas Holt	38
Blakehurst	The Bay Nursing Home	Kennedy Health Care Group (recently purchased by Estia)	72
Blakehurst	Blakehurst Aged Care Centre	IBIS Care Holdings	104
South Hurstville	ARV Mary Andrew Hostel	Anglican Retirement Villages (ARV)	42
South Hurstville	St Bede's Home	Catholic Healthcare	44
Brighton-Le-Sands	Jenny Lyn Aged Care Facility	Riviera Health	40

Suburb	Site	Provider	Beds
Secondary Catchment			
Rockdale	Hall & Prior Menaville Aged Care	Hall & Prior Aged Care	48
Rockdale	UnitingCare Bruce Sharpe Lodge	Uniting Residential Care	52
Banksia	Rockdale Nursing Home	Rockdale Nursing Home	70
Arncliffe	Hall & Prior Alloa Aged Care Home	Hall & Prior Aged Care	42
Arncliffe	Macquarie Lodge Aged Care Plus Centre	Salvation Army Aged Care Plus	130
Bexley	Bexley Park Aged Care	Kennedy Health Care Group (recently purchased by Estia)	145
Bexley	Bupa Bexley	Bupa Aged Care	69
Bexley	Fairmont Aged Care	Fairmont Aged Care	44
Bexley	Homewood Care	Homewood Care	124
Bexley	Huntingdon Gardens Aged Care Facility	Trinity Management Services	93
Bexley	Scalabrini Village Bexley	Scalabrini Village	177
Bexley	Bexley Care Centre	Synovum Care Group	60
Bexley	St George Aged Care Centre	St George Aged Care Centre	111
Narwee	Bupa Narwee	Bupa Aged Care	103
Peakhurst	IRT Peakhurst	IRT	92
Peakhurst	Peakhurst Lodge	OLC Care	110
Peakhurst	UnitingCare Banks Lodge	Uniting Residential Care	114
Peakhurst	UnitingCare Nunyara Aged Care Centre	Uniting Residential Care	74

Suburb	Site	Provider	Beds
Tertiary Catchment			
Roselands	Leigh Place Retirement Housing	Leigh Place Aged Care	68
Lakemba	Opal Wallgrove	Opal Aged Care	52
Lakemba	RFBI Lakemba Masonic Village	Royal Freemasons Benevolent Institution	50
Lakemba	Lourantos Village	St Basil's Homes	80
Lakemba	St Basil's Homes Lakemba	St Basil's Homes	111
Belmore	Regis Delphi House	Regis Aged Care	72
Belmore	Rosemore Aged Care	Allity	78
Earlwood	Chow Cho-Poon Nursing Home	ANHF	46
Earlwood	Greek Orthodox Community Home for the Aged	Greek Orthodox Community	48
Campsie	Opal Canterbury	Opal Aged Care	88
Campsie	CASS Residential Aged Care Facility	Chinese Australian Services Society	63
Croydon	Holy Spirit Residential Aged Care Croydon	Catholic Healthcare	127
Croydon	St Ezekiel Moreno Nursing Home & Hostel	St Ezekiel Moreno Nursing Home	58
Padstow	Casa Mia Aged Care Facility	Christadelphian Aged Care	100
Padstow Heights	Southhaven Aged Care Facility	Christadelphian Aged Care	140
Jannali	Chesalon Care Jannali	Anglicare Sydney	127
Sylvania	Moran Sylvania	Moran Health Care Group	165
Sylvania	Wesley Vickery Lodge	Wesley Mission	69
Sylvania	Pacific Heights Nursing	Pacific Heights Nursing Home	76
Miranda	Alkira Gardens	OLC Care	90
Miranda	Miranda Aged Care Facility	Doherty Care	80
Miranda	HammondCare Residential Care Miranda	HammondCare	92

Suburb	Site	Provider	Beds
Tertiary Catchment			
Miranda	Hellenic Village	St Basil's Homes	101
Miranda	IBIS Care Big Sister	IBIS Care Holdings	76
Miranda	Juliana Village	Juliana Village	71
Taren Point	ARV Goodhew Gardens	Anglican Retirement Villages (ARV)	119

Source: DPS Guide, myagecare, Aged Care Online



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