



# **BATHURST INTEGRATED MEDICAL CENTRE**

## **Economic Impact Assessment**

*Prepared for Zauner Construction 24<sup>th</sup> August 2021 (updated 25<sup>th</sup> January 2022)*



# EXECUTIVE SUMMARY

## BATHURST INTEGRATED MEDICAL CENTRE (BIMC)

The Bathurst Integrated Medical Centre (BIMC) is a proposed six-storey, fully integrated medical centre, modelled on the successful Gardens Medical Centre's in Albury and the Bloomfield Medical Centre in Orange.

'Medical centre' is a term used for a collection of medical uses provided at the same site, typically including General Practitioners (GPs) and other services such as a pharmacist, pathology, physiotherapists and the like. This subject development will also include a state-of-the-art private hospital. Typically, medical centres that bring success to the centre and surrounding businesses are situated within high profile locations, either along main roads or within proximity to a retail/commercial centre or transport node.

It is important for medical precincts and clinics to provide an adequate number of facilities, enabling a one-stop medical destination and serving a wide region.

Based on data from the ABS, there is a significant underprovision of a vast number of medical professions within Bathurst, a figure which is projected to worsen through population growth over time.

The Bathurst SA3 area would be the main catchment area for the facility and includes a current estimated population of 51,300, having increased from 45,150 in 2011, and 48,300 in 2016. The catchment area population is projected to grow to 60,550 persons over the period to 2041, representing an average annual rate of 460 persons or 0.8% (conservative scenario).

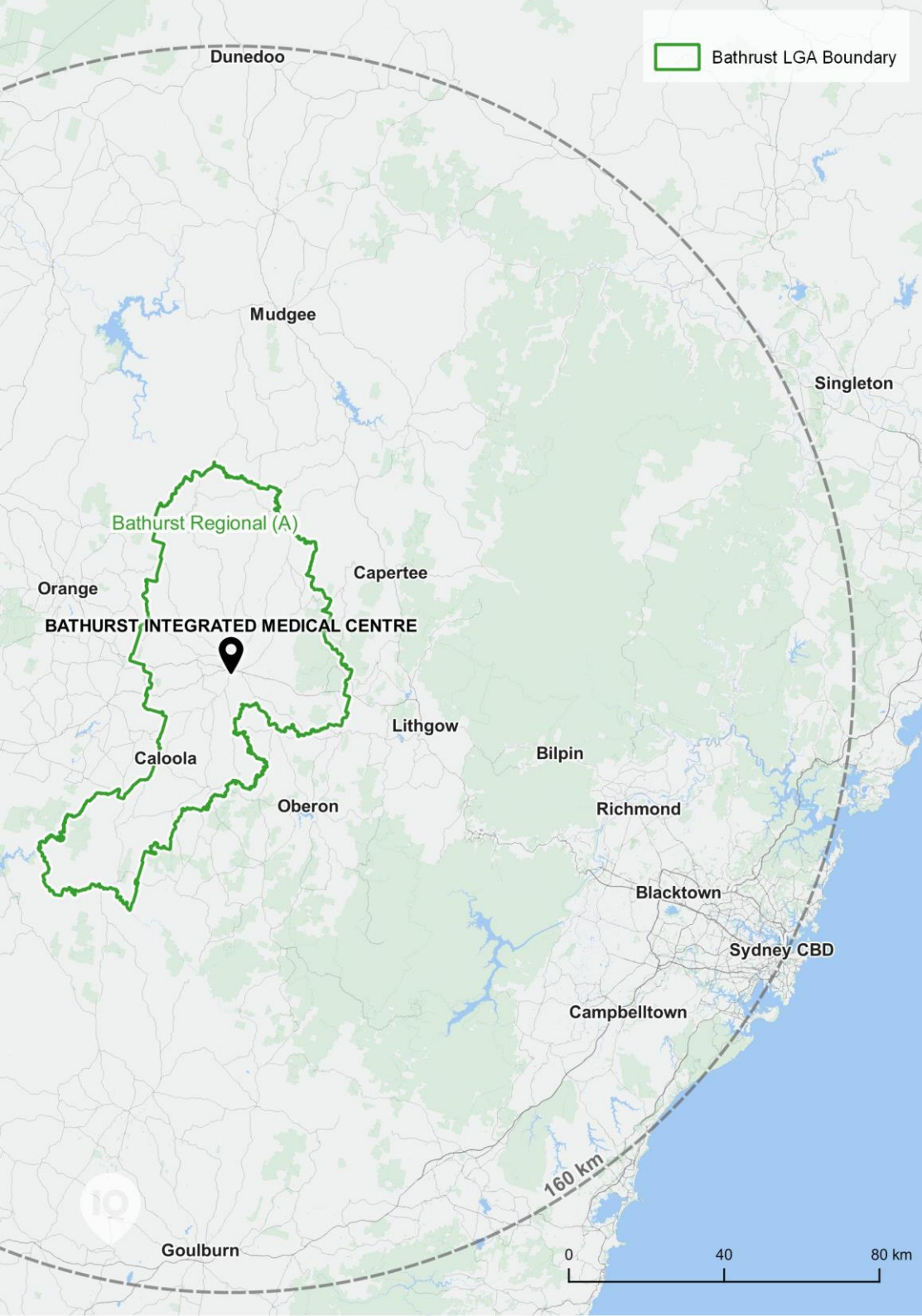
The catchment area is characterised by an established, Australian-born, traditional family market who would associate strongly with enhanced, amenable medical facilities. The population spends around \$71.3 million each year on health-related categories, a figure which is forecast to grow to \$101 million by 2041 (2021 dollars).

The future population growth that is projected to occur throughout the catchment area is likely to continue attracting a number of families from metropolitan locations. These households are likely to expect a similar level of medical and related-services to that available in the cities.

The proposed BIMC would result in a range of important economic benefits which will be of direct benefit to the local community. These key positive impacts include:

- **Improved Range of Facilities:** brand new infrastructure to expand and to retain important Bathurst medical resources and specialties and increased ease of access to medical services by residents of Bathurst and surrounds.
- **Quality, Best-in-Class Design:** highly convenient, state of the art facility for local families and workers. The concept and design of the centre is at the forefront of modern medical and mixed-use development trends –typically reserved for inner-city metropolitan regions.
- **Satiating Undersupply:** ease the existing and future undersupply of medical professions.
- **Activation of Precinct:** staff, patients, and companions/visitors to BIMC (and users of the redeveloped George Street Carpark) would add to visitation within the Bathurst CBD as well as increase dwell time. This would likely result in spin-off benefits for the other facilities in the City Centre. Even small cross-shop volumes, such as 50% of visitors spending an additional \$20 nearby would represent some \$7 million in localised expenditure each year. If this or a similar development were to locate outside of the CBD, the cross-visitation benefits would be dramatically reduced and possibly inverted.
- **New Car Park for the Bathurst CBD:** The facility will comprise some 915 car spaces, a substantial increase from the current 330 car spaces. This will be a great benefit to all facilities in the CBD as well as residents by providing a higher level of convenience.
- **Ongoing Employment:** it is estimated that an additional 711 ongoing jobs would be generated as a result of the development, both directly and indirectly.
- **Construction Employment:** based on industry benchmarks and multipliers, a total of 934 jobs are expected to be generated in combination as a result of construction.
- **Economic Output and Value Added:** information from .id Consulting indicates that the combination of all direct, industrial and consumption effects (construction and ongoing) would result in total estimated rise in Output of \$168.97 million in Bathurst LGA economy, or value added of \$80.22 million.





## REGIONAL CONTEXT

The regional city of Bathurst is in the Central Tablelands of New South Wales, approximately 55 km south-east of Orange and 200 km north-west of the Sydney CBD.

Bathurst is Australia's oldest inland settlement and is a major tourist destination. According to the Central West and Orana Regional Plan 2036, upwards of 200,000 people visit the iconic motor race events at Mount Panorama each year.

Aside from tourism, major economic drivers include manufacturing, health care and social assistance, and education and training. There are two major tertiary education institutions at Bathurst, namely Charles Sturt University and Western Institute of TAFE, together with a range of private and public schools.

Bathurst Base Hospital is situated around 1 km to the north of the Bathurst CBD. This is a large regional hospital with 148 beds, a 10-bed mental health unit and an emergency department. The existing Bathurst Private Hospital has two fully equipped operating theatres and offers up to 12 overnight beds for surgical and medical admissions as well as a day surgery.

The new Bathurst Private Hospital, at the Integrated Medical Centre, will see and almost-doubled capacity, with the inclusion of 4 theaters, 9 recovery beds and chairs for day surgeries, as well as 16 ward rooms for overnight admission.

Bathurst acts as a regional hub for education and medical facilities in the surrounding area.





# LOCAL CONTEXT

Zauner Construction propose the Bathurst Integrated Medical Centre and the George Street Carpark within the Bathurst CBD. The project site is encompassed by Howick Street, George Street, Russell Street and Rankin Street and is the redevelopment of the former Clancy Motors site and the existing Council George Street Carpark.

An extensive provision of retail and non-retail floorspace is provided throughout the Bathurst CBD, with the largest provision provided along William Street, George Street and Howick Street.

- Bathurst RSL to the immediate north.
- Armada Bathurst (corner of William Street and Howick Street) is based on Kmart, Big W, Woolworths and shops.
- Bathurst City Centre, anchored by a Woolworths supermarket, JB Hi-Fi, and shops.
- Bathurst Chase, anchored by a Coles supermarket, on the northern corner of William Street and Howick Street.
- An Aldi supermarket is located along Russell Street, with a Mitre 10 provided along Bentinck Street.
- Bernardi's Marketplace Supa IGA located along Rankin Street.
- A Dan Murphy's liquor outlet is located along the Great Western Highway.
- Carrington Park Sportsground is situated along Bentinck Street.
- The Bathurst Bowling Club and Bathurst Aquatic Centre are located on the northern side of the Great Western Highway.



- Site
- Shopping Centre
- Retail
- Entertainment
- Sports

PhotoMap by nearmap.com





# PLANNING CONTEXT

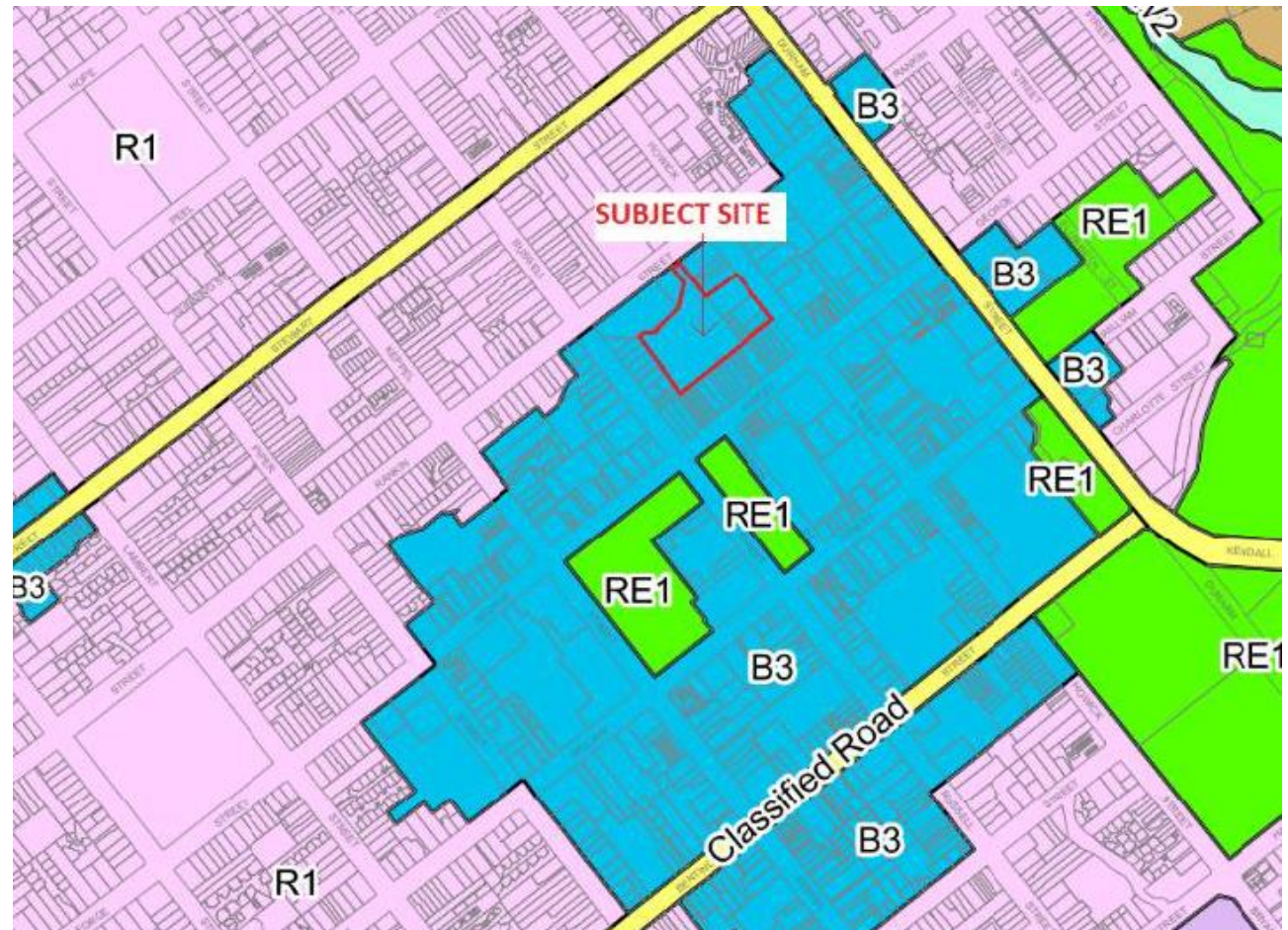
## B3 COMMERCIAL CORE ZONING

The site is zoned B3 Commercial Core with all uses proposed being permitted at the subject site.

The objectives of the B3 Commercial Core zoning are to:

- To provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community.
- To encourage appropriate employment opportunities in accessible locations.
- To maximise public transport patronage and encourage walking and cycling.
- To encourage development that confirms the role of the Bathurst central business district as the primary retail and business centre in the region.
- To protect and conserve the historic and scenic quality of the Bathurst central business district as a key economic and social asset.

### B3 COMMERCIAL CORE ZONE



# BATHURST INTEGRATED MEDICAL CENTRE

## PROPOSED DEVELOPMENT COMPOSITION

Zauner Construction now propose a mixed-use development at the Bathurst CBD site.

The Bathurst Integrated Medical Centre (BIMC) is a prospective six-storey, fully integrated medical centre, modelled on the successful Gardens Medical Centre's in Albury and the Bloomfield Medical Centre in Orange.

The centre will provide brand new infrastructure to expand and to retain important Bathurst medical resources and specialties.

The facility will include state of the art modern medical and ancillary services, including:

- A private hospital (2,398 sq.m)
- General practice (1,469 sq.m)
- Allied Health (2,019 sq.m)
- Pathology (250 sq.m)
- Radiology (800 sq.m)
- Medical Education & Research (1,819 sqm)
- Pharmacy (100 sq.m)

In addition, a café (378 sq.m) would be provided at ground level, to complement the offer and serve as an effective single destination for most health needs.

Overall, BIMC will comprise total floorspace of 10,033 sq.m.

### INDICATIVE DEVELOPMENT COMPOSITION

Category/Component	Level							Total
	Ground	One	Two	Three	Four	Five	Roof Deck	
Retail GLA (sq.m)								
Café	178	-	-	-	-	-	-	178
Café Outdoor Dining	200	-	-	-	-	-	-	200
Pharmacy	-	100	-	-	-	-	-	100
Medical & Ancillary Services GLA (sq.m)								
Radiology	800	-	-	-	-	-	-	800
GP Clinic	-	1,469	-	-	-	-	-	1,469
Pathology	-	250	-	-	-	-	-	250
Medical Education & Research	-	-	1,819	-	-	-	-	1,819
Allied Health	200	-	-	1,819	-	-	-	2,019
Specialist Consulting Rooms	-	-	-	-	800	-	-	800
Private Hospital	-	-	-	-	799	1,599	-	2,398
Car Parking (bays)								
Total Bays	252	165	166	166	-	-	166	915

Source: Zauner Construction

With the 25 spaces proposed on ground level at the BIMC, the car parking available will increase from approximately 330 spaces to as many as 940 vehicles, benefiting the Bathurst community, surrounding CBD businesses, RSL Club patrons, and staff and patients of the new Medical Centre A network of discrete laneways around the site will facilitate convenient, all-ways access to parking, while internal ramps will provide connectivity to upper levels.

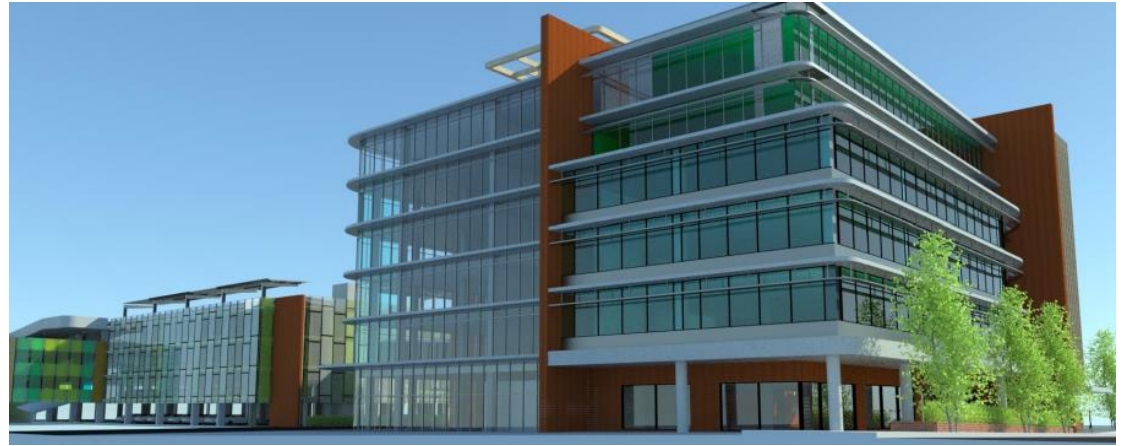
The planned floorspace and height are greater than the existing FSR controls of 2:1 and 12m, respectively. However, the viability of the project is dependent on the designed height and vertical integration as mirrored in the Gardens Medical Centre at Albury and Bloomfield Medical Centre at Orange. Without the efficiencies of height, the viability for the developer would not exist and these best-in-class facilities could not proceed for the benefit of Bathurst and the region.



**BATHURST INTEGRATED MEDICAL CENTRE**



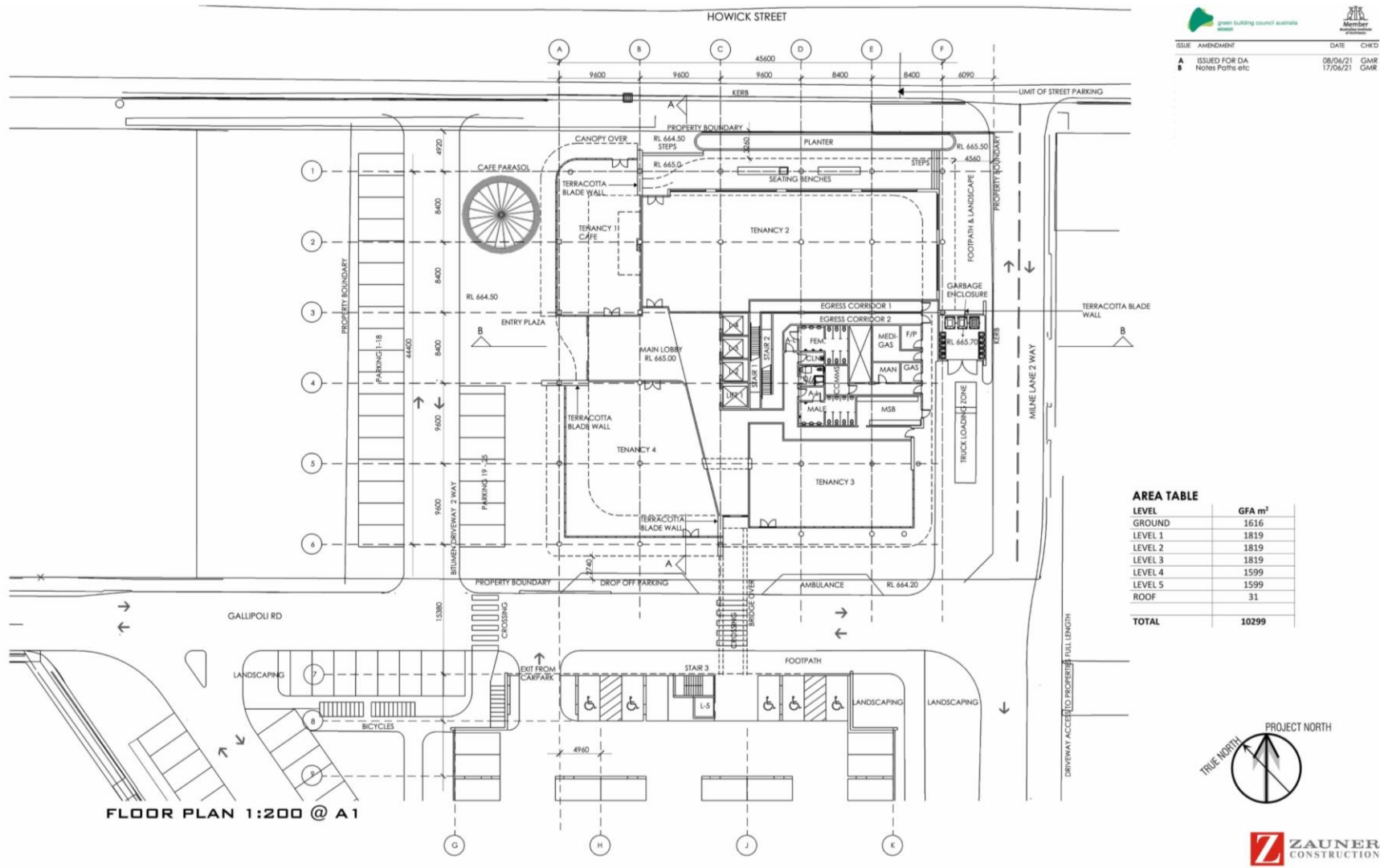
# BATHURST INTEGRATED MEDICAL CENTRE CONCEPT SKETCHES



# BATHURST INTEGRATED MEDICAL CENTRE

## PROPOSED SITE PLAN

### GROUND FLOOR

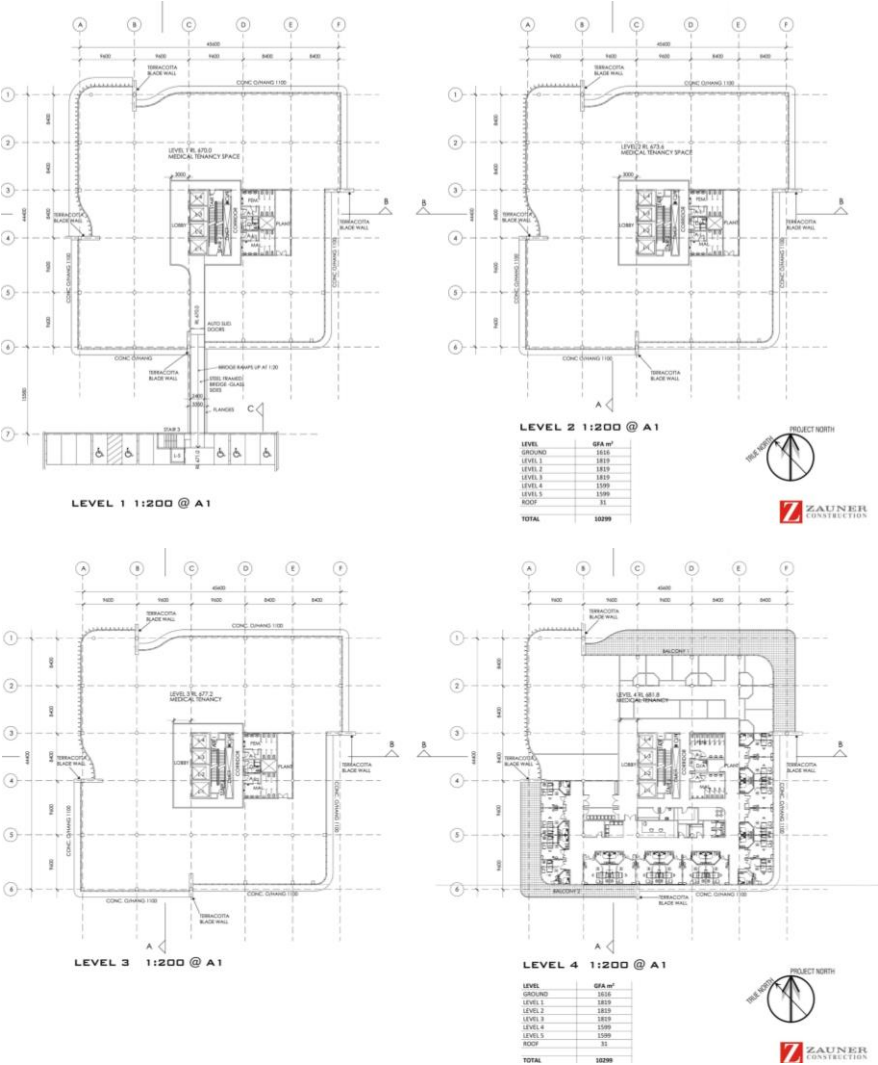




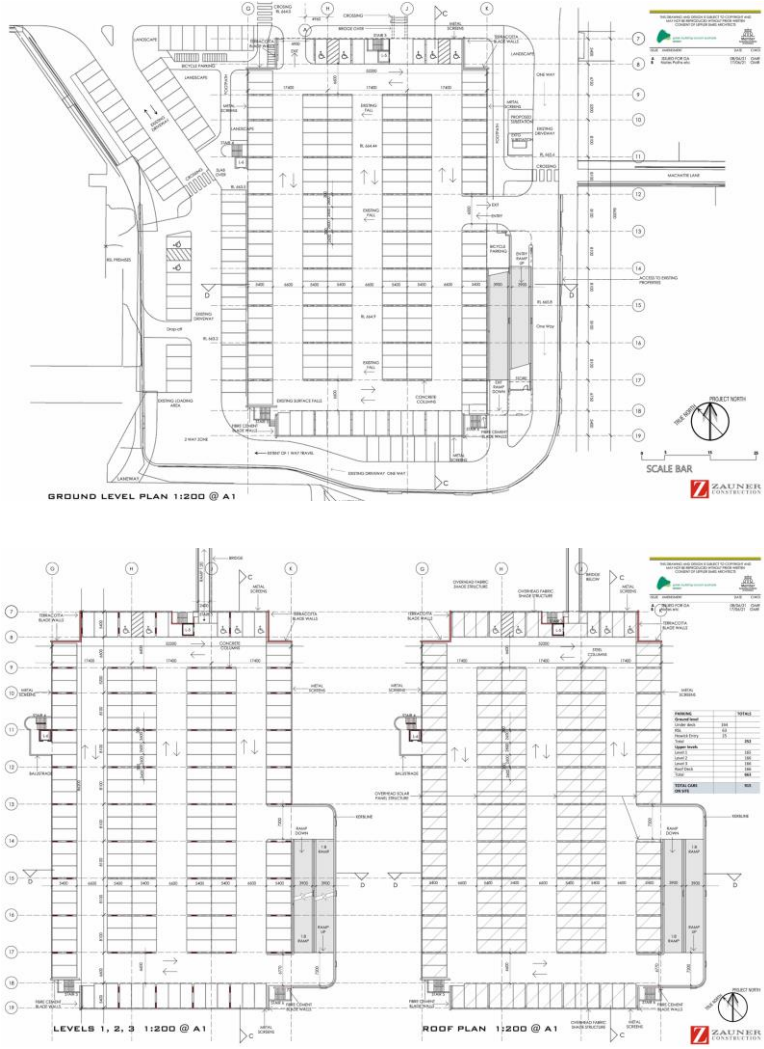
# BATHURST INTEGRATED MEDICAL CENTRE

## PROPOSED SITE PLAN

LEVELS 1 - 4



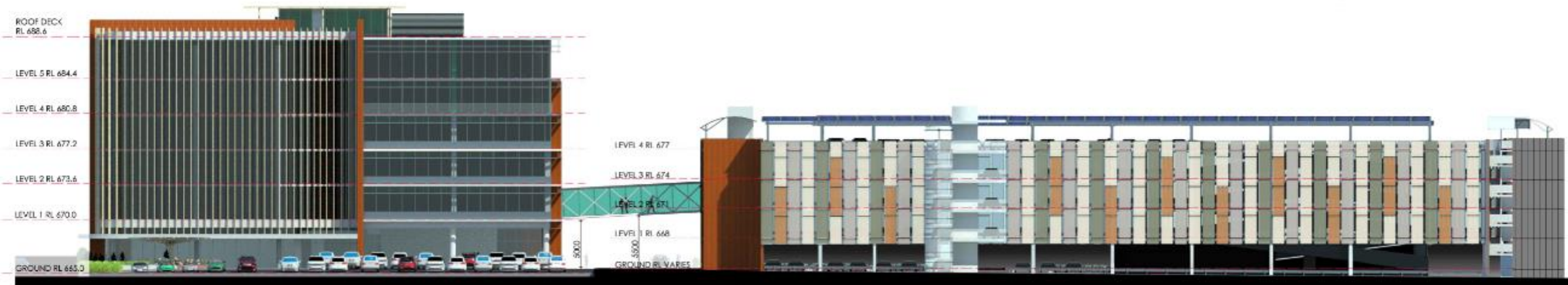
CAR PARKING PLAN



# BATHURST INTEGRATED MEDICAL CENTRE

## PROPOSED SITE PLAN

### ELEVATION PROFILES



WEST ELEVATION 1:200 @ A1



EAST ELEVATION 1:200 @ A1

REFER TO DA 14 FOR FINISHES





# BATHURST CATCHMENT AREA

The Bathurst Statistical Area 3 (SA3) is the relevant catchment area for higher order and destinational uses in the Bathurst CBD. This is also the applicable catchment area for the Bathurst Integrated Medical Centre.

The Bathurst SA3 covers 6,984 sq.km and extends from Hill End in the north to the Abercrombie River National Park in the south. As well as Bathurst, the SA3 includes the larger satellite towns of Oberon, and Burruga.

Destinational facilities in the Bathurst CBD would also likely draw from the town of Blayney, 37 km to the south-west of Bathurst and from Lithgow, 62 km to the east.

Residents of Blayney and Lithgow would be part of a secondary catchment area, however, would also frequent facilities at Orange and Katoomba, respectively, which are a shorter drive than the drive to Bathurst. These populations would add to the already significant demand for the proposed facility based off the catchment area.



# CATCHMENT AREA POPULATION – CONSERVATIVE SCENARIO

The catchment area population is currently estimated at 51,300 in 2021, having increased from 45,150 in 2011, and 48,300 in 2016.

The catchment area population is projected to grow to 60,550 persons over the period to 2041, representing an average annual rate of 460 persons or 0.8%.

This projected growth rate is considered somewhat conservative given recent population growth in the area has exceeded 600 persons per annum, however, broadly aligns official forecasts from the NSW Department of Planning (0.6% per annum) and forecast.id (1.1% per annum).

Key greenfield residential areas that are currently undergoing or planned for major development in Bathurst over the forecast period include:

- **Kelso:** some 400 hectares of greenfield land with the potential to accommodate in excess of 4,000 dwellings, or 10,000 persons.
- **Abercrombie, Llanarth and Windradyn:** there is in-excess of 100 hectares of greenfield land for with the potential for 3,500 persons.
- **Eglington:** spans 76.5 hectares with the capacity for 612 new lots, or approximately 1,500 persons.

An average of 257 new dwellings were approved annually across the Bathurst SA3 over the 2011/12 – 2019/20 period, of which the vast majority were houses (78%).

Across the area, residential dwellings accounted for 74% (\$84.8 million) of the total value of new building approvals in 2019/20.

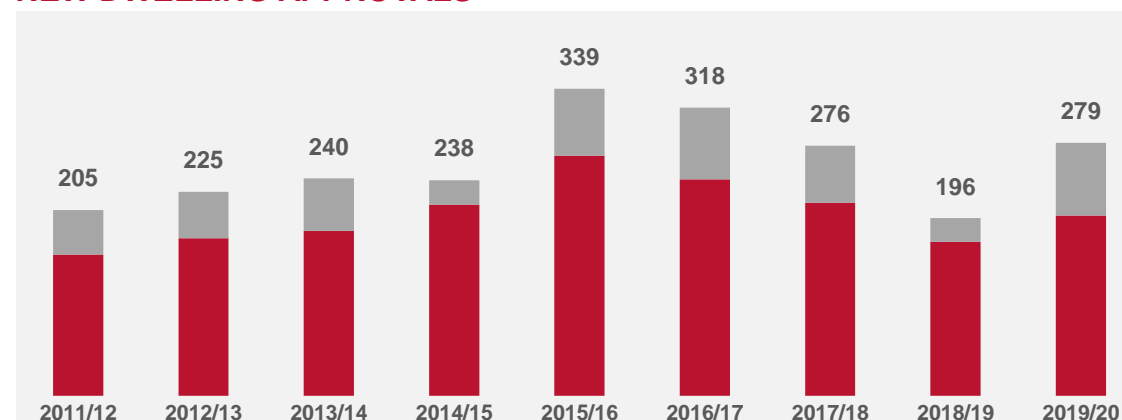
Workers and visitors would add to demand for facilities in the Bathurst CBD.

## CATCHMENT AREA POPULATION, 2011 - 2041

Population	Actual		2021	2026	Forecast		
	2011	2016			2031	2036	2041
Bathurst SA3	45,150	48,300	51,300	54,050	56,550	58,550	60,550
Average Annual Change (No.)	Actual		2016-21	2021-26	Forecast		
	2011-16	2016-21			2026-31	2031-36	2036-41
Bathurst SA3	630	600	550	500	400	400	400
Average Annual Change (%)	Actual		2016-21	2021-26	Forecast		
	2011-16	2016-21			2026-31	2031-36	2036-41
Bathurst SA3	1.4%	1.2%	1.0%	0.9%	0.7%	0.7%	0.7%

*All figures as at June and based on 2016 SA1 boundary definition.  
Sources : ABS; Bathurst LGA, NSW Dept. of Planning, forecast.id*

## NEW DWELLING APPROVALS





# CATCHMENT AREA POPULATION – FORECAST.ID SCENARIO

Utilising the latest October 2021 projected population figures for the Bathurst Regional Council area, the catchment area population is currently estimated at 51,239 in 2021, having increased from 45,150 in 2011, and 48,300 in 2016.

The catchment area population is projected to grow to 64,187 persons over the period to 2041, representing an average annual rate of 647 persons or 1.13%.

The catchment area projected population in 2026 is around 330 persons higher than the Conservative Scenario and in 2041, the population is 3,637 persons higher.

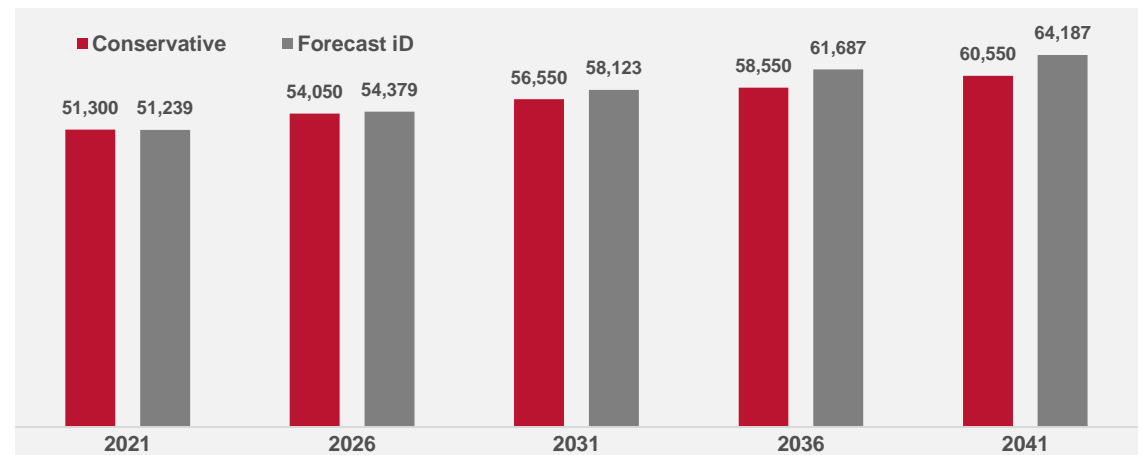
## CATCHMENT AREA POPULATION, 2011 - 2041

Population	Actual				Forecast		
	2011	2016	2021	2026	2031	2036	2041
Bathurst SA3	45,150	48,300	51,239	54,379	58,123	61,687	64,187
Average Annual Change (No.)	Actual				Forecast		
	2011-16	2016-21	2021-26	2026-31	2031-36	2036-41	
Bathurst SA3	630	588	628	749	713	500	
Average Annual Change (%)	Actual				Forecast		
	2011-16	2016-21	2021-26	2026-31	2031-36	2036-41	
Bathurst SA3	1.4%	1.2%	1.2%	1.3%	1.2%	0.8%	

*All figures as at June and based on 2016 SA1 boundary definition.*

*Sources : ABS; forecast.id - Oct 2021*

## CONSERVATIVE VS FORECAST.ID POPULATION PROJECTIONS



# DWELLING PRICES

## BATHURST LGA

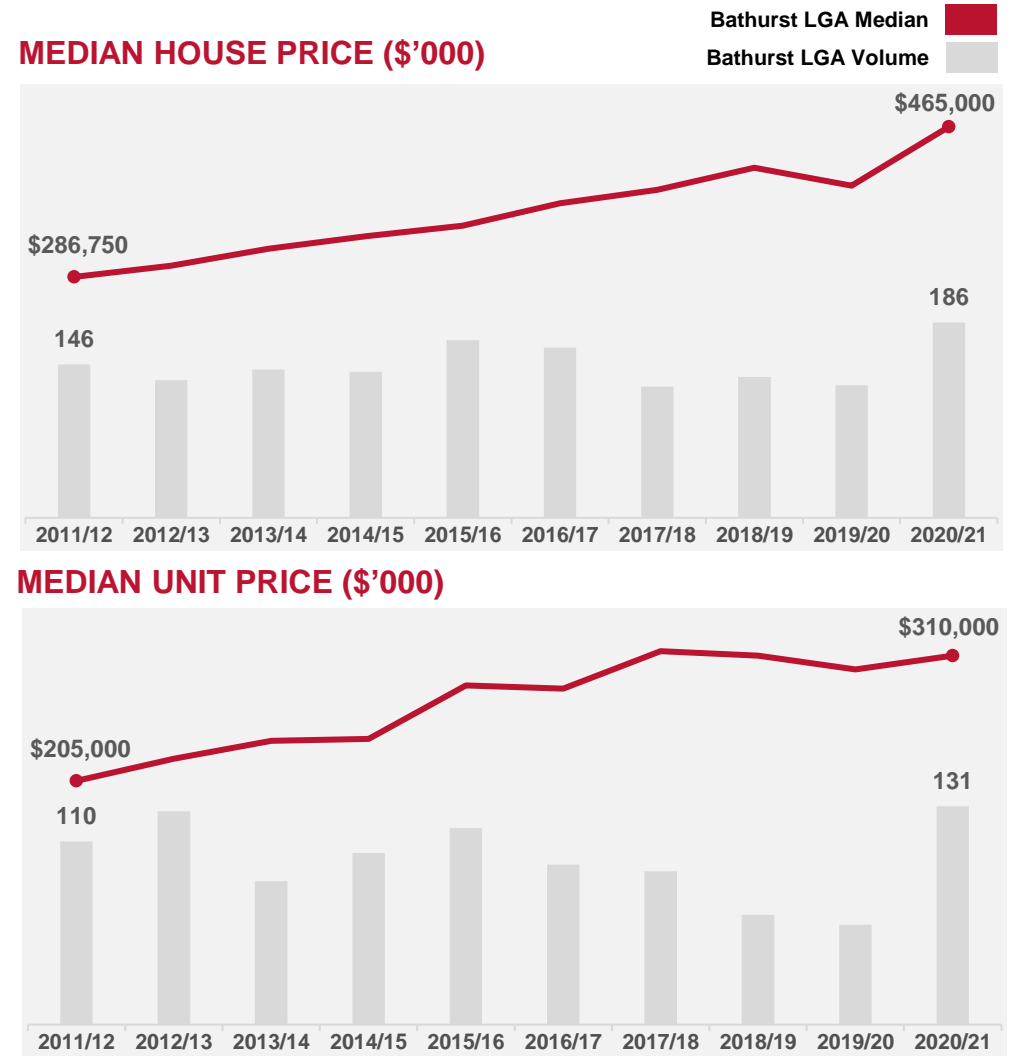
The Sydney housing market has been the strongest in Australia over the past decade and beyond, with current conditions following this trend.

Regional NSW, however, is outperforming Sydney's property market at present, with an influx of demand from tree and sea-changers stemming from the COVID-19 pandemic and increased workplace flexibility (work from home etc.).

In these smaller markets, a sudden influx of population and/or demand can have more substantial impacts on pricing.

Across the Bathurst LGA, median house and unit prices for 2020/21 are currently \$465,500 and \$310,000, respectively. This represents an increase in median dwelling prices of 62% and 51%, for houses and units, since 2011/12.

The median weekly rent for houses within Bathurst is currently \$360 per week, while unit average rents range from \$215 - \$375 per week for one-to-three-bedroom units.



Source: Pricefinder

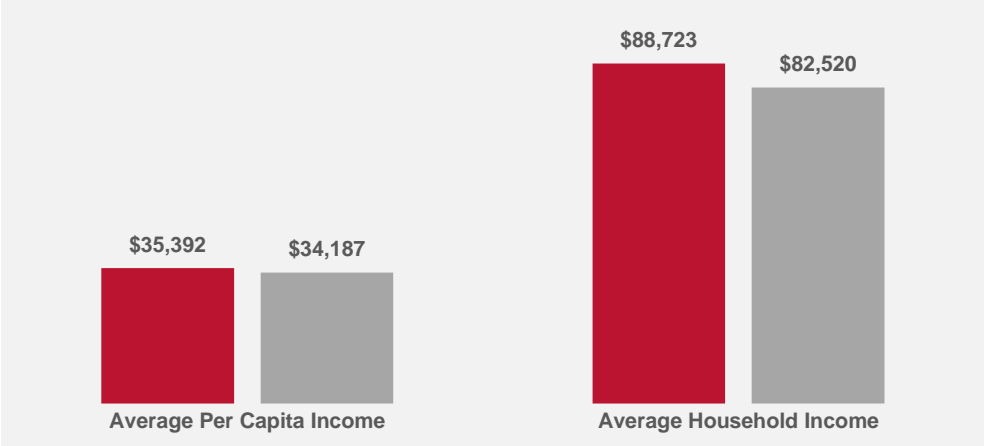


# CATCHMENT AREA

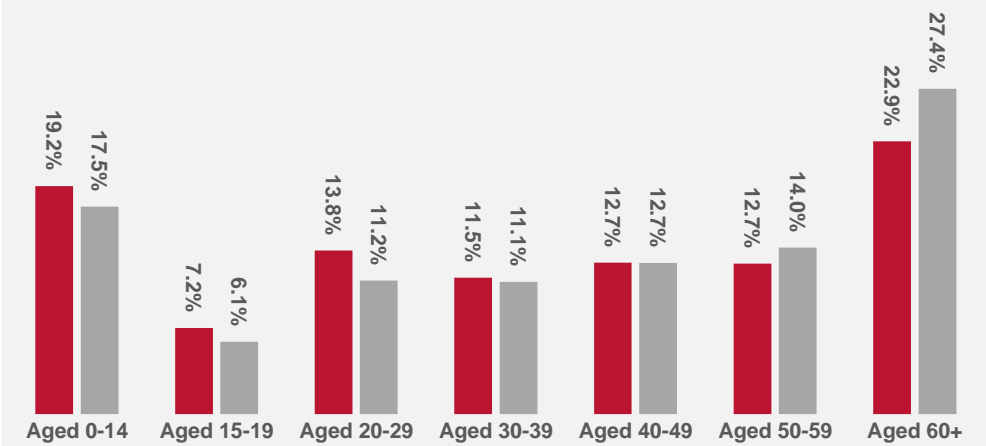
## SOCIO-ECONOMIC PROFILE

The Bathurst catchment area is characterised by an established, Australian-born, traditional family market who would associate strongly with enhanced, amenable medical facilities. The average age of the population at 38.8 years is similar to the Australian average, and younger than the non-metropolitan New South Wales average (41.8 years).

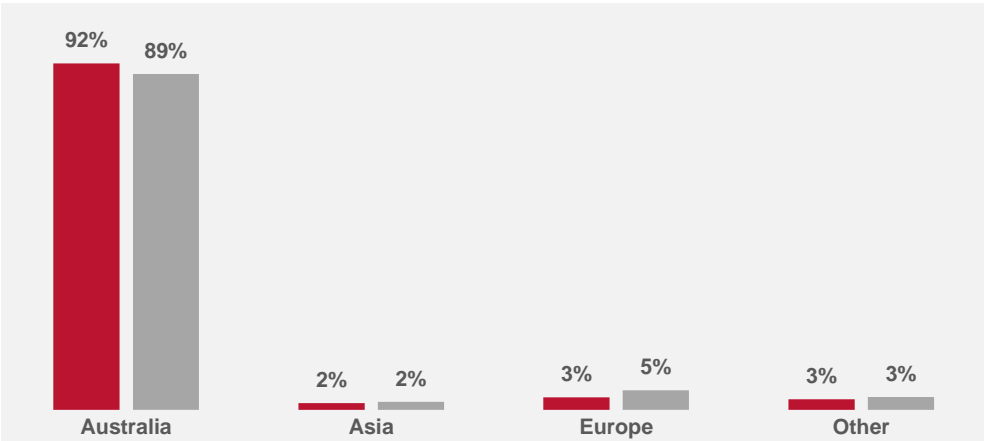
### INCOME LEVELS (\$)



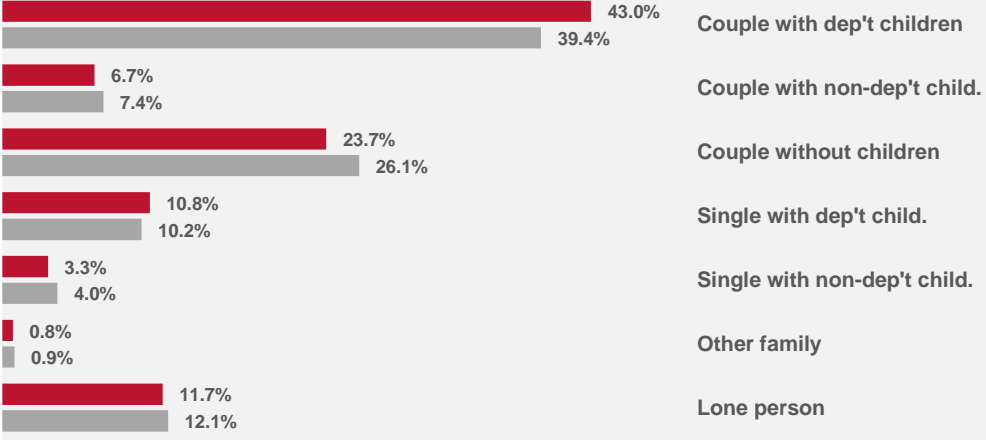
### AGE DISTRIBUTION (%)



### BIRTHPLACE (%)



### FAMILY TYPE (%)



Source: ABS Census 2016

# CATCHMENT AREA EXPENDITURE – CONSERVATIVE SCENARIO

## PER CAPITA EXPENDITURE IN-LINE WITH AVERAGE

The estimated retail expenditure capacity of the catchment area population is based on information sourced from MDS Market Data Systems. MDS utilises a detailed micro-simulation model of household expenditure behaviour for all residents of Australia.

The average person within the catchment area spends \$14,834 per year on retail, which is 6% lower than the average non-metropolitan New South Wales resident. Around 60% of this retail expenditure, or \$8,960 per year, is food expenditure.

Health expenditure per capita is estimated at \$1,399 each year across the catchment area. This category is made up of the following spending types:

- General practitioner, specialist doctor, dental, physiotherapy and chiropractic fees.
- Insurance for hospital, medical, ambulance, sickness and personal accident.
- Hospital and nursing home charges.
- Medical care or equipment hire, as well as other ancillary expenses.

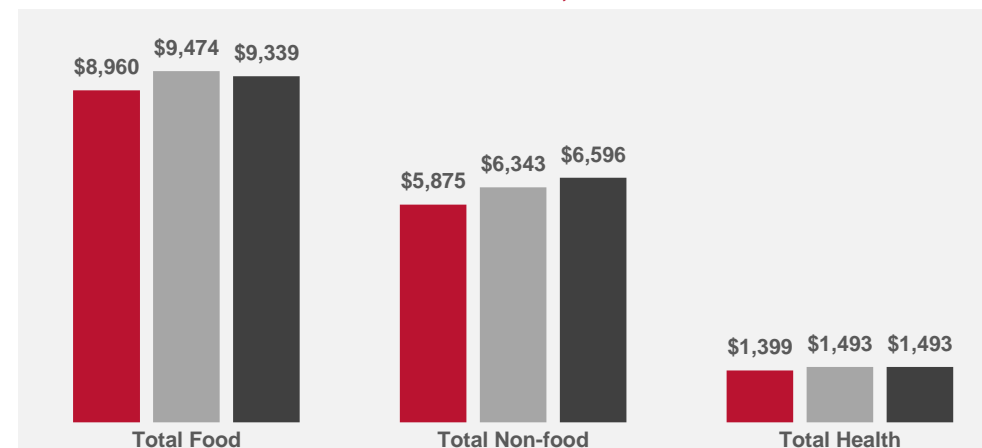
This would indicate that the catchment area population spends around \$71.3 million each year on health-related categories, a figure which is forecast to grow to \$101 million by 2041 (constant 2021 dollars).

The future population growth that is projected to occur throughout the catchment area is likely to continue attracting a number of families from metropolitan locations.

These households are likely to expect a similar level of medical and related-services to that available in the cities.

## SPEND PER CAPITA BY CATEGORY, 2020/21

Catchment Area  
Non-metro NSW  
Australia



## BATHURST SA3 TOTAL SPEND, 2021 – 2041

Y/E June	Total Food	Total Non-food	Health
2021	456.9	299.6	71.3
2026	490.5	325.4	77.5
2031	529.2	358.1	85.3
2036	565.2	390.1	92.9
2041	602.5	424.0	101.0
Exp.Growth (2021-41)	145.6	124.5	29.6
Exp.Growth (Annual %)	1.4%	1.8%	1.8%

\*Constant 2020/21 dollars & excluding GST

Source : MarketInfo





# CATCHMENT AREA EXPENDITURE – FORECAST.ID SCENARIO

For the Forecast.id scenario, the catchment area population spends around \$71.3 million each year on health-related categories, a figure which is forecast to grow to \$107 million by 2041 (constant 2021 dollars).

Health expenditure under this scenario is \$0.4 million higher in FY2026 and \$6 million higher in F2041.

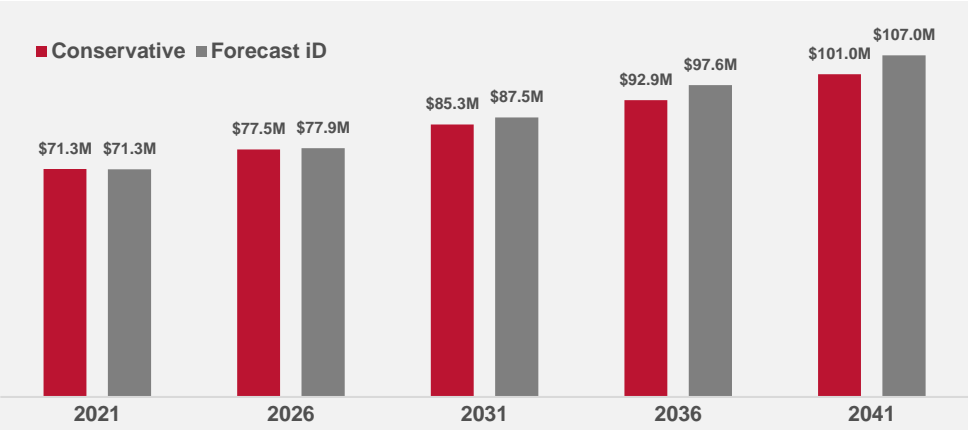
## BATHURST SA3 TOTAL SPEND, 2021 – 2041

Y/E June	Total Food	Total Non-food	Health
2021	456.4	299.2	71.3
2026	493.1	327.2	77.9
2031	542.7	367.3	87.5
2036	594.0	410.0	97.6
2041	638.3	449.2	107.0
Exp.Growth (2021-41)	181.9	150.0	35.7
Exp.Growth (Annual %)	1.7%	2.1%	2.1%

\*Constant 2020/21 dollars & excluding GST

Source : MarketInfo

## HEALTH EXPENDITURE COMPARISON





# BATHURST WORKERS & VISITORS

## WORKERS

The Bathurst CBD includes a significant provision of employment floorspace, including retail, commercial and community uses.

Workers are most likely to travel during their lunchtime, before and after work. The distance they travel is typically up to around 1 km from their place of work, or around a 10-minute walk. The local journey to work boundary is shown on the adjacent map and generally falls within 1 – 2 km of the CBD.

As at 2016 Census, there were some 9,770 workers within the defined area, a figure which is likely to have grown since that time.

Typically, it is estimated that 15% - 20% of worker expenditure will be directed to retail facilities near their place of work. In this instance, the amount of retail expenditure directed to retail facilities within and immediately beyond the Bathurst CBD would be in the order of \$24 - \$31 million currently.

Office and retail workers primarily spend on food catering, giftware, leisure and apparel items, however, also tend to book medical or related appointments during lunch breaks or after hours.

In relation to health spending, assuming a similar range of 15% - 20% of spend is undertaken nearby to work, this figure would be in the order of \$2 - \$3 million.

## VISITORS

In addition to the resident and worker population, the Bathurst CBD is also likely to attract visitation from visitors/tourists. The Bathurst Regional Council area attracts some 1 million domestic and international visitor nights each year, and around 0.6 million day trippers.

## SUMMARY

The planned BIMC in the Bathurst CBD would provide workers and visitors easy access to a range of medical facilities near their place or work/accommodation. From a single car trip to the George Street carpark, people can access the BIMC and other CBD locations without the need to move their cars between venues.





# MEDICAL & ANCILLARY USES PROVISION

'Medical centre' is a term used for a collection of medical services provided at the same site, typically including General Practitioners (GPs) and other services such as a pharmacist, pathology, physiotherapists and the like.

Typically, successful medical centres are situated within high profile locations, either along main roads or within proximity to a retail/commercial centre or transport node. Thereby facilities receive maximum exposure to passing traffic, but more importantly, are easily recognisable and accessible for the surrounding customer segments.

It is important for medical precincts and clinics to provide an adequate number of facilities, enabling a one-stop medical destination and serving a wide region. Specialist and ancillary medical uses include a range of professions and services, such as:

- Dentist
- Nutritionist
- Physiotherapist
- Dermatologist
- Pediatrician
- Psychiatrist
- Psychologist
- Gynaecologist
- Speech therapy
- Medical equipment
- Pathology clinic
- Podiatrist
- Radiology
- Ophthalmology
- Occupational Therapy
- Orthopaedics

The table above outlines the total number of doctors and ancillary health professionals within the Bathurst SA3s as at 2019.

## HEALTH PROFESSIONALS PER 10,000 PERSONS (2019)

Practitioners	Health Prof. in SA3 (Employed no.)	Health Professionals per 10,000 persons		
		SA3	NSW	AUS
Chiropractors	8	1.6	2.3	2.2
Dental Practitioners	30	6.1	8.9	9.6
GP's	43	8.8	11.9	12.8
Nurses and Midwives	732	149.5	136.2	160.3
Occupational Therapists	27	5.5	8.1	9.4
Optometrists	10	2.0	2.4	2.4
Pharmacists	42	8.6	12.0	12.9
Physiotherapists	42	8.6	12.6	13.7
Podiatrists	8	1.6	1.9	2.2
Psychologists	54	11.0	15.2	14.9

Bathurst

\*2019 Headcount of Practitioners

Source: AIHW

Undersupply

Oversupply

This also includes a comparison of the provision of professionals per 10,000 residents, with the New South Wales and Australian benchmarks. As shown, there is a significant underprovision of all professions within Bathurst, except for Nurses and Midwives (still underprovided against national averages).





# MEDICAL & ANCILLARY USES

## FUTURE DEMAND

These tables detail the projected demand for net additional medical professionals (i.e. over and above the existing provision within Bathurst) over the 2021 – 2041 period, based on the New South Wales provision benchmarks.

As shown, a net additional 283 health professionals are projected to be supportable over the period to 2041, or an average of 14 each year, across the various fields (conservative scenario). Under the Forecast.id scenario, a net additional 360 health professionals are projected to be supportable over the period to 2041, or an average of 18 each year, across the various fields

Importantly, this demand does not include the employment of associated support and non-qualified workers that assist with the day-to-day operation of these services and typically make up most employees at many medical facilities.

Further, while not represented in benchmark data, it is likely that other medical professionals such as Nutritionists, Dermatologists, Pediatrician, Psychiatrists, Gynaecologist, Cosmetic Surgery Speech therapists, Pathologists, Radiologist, Ophthalmologists and Orthopaedic Surgeons would be similarly under-represented or underprovided across the region.

In addition to the growing resident population, the prominent location and its wider regional draw for workers would contribute additional demand for specialist medical uses at the subject site.

Excellent accessibility and the high-profile nature of the site also lend themselves to specialist medical uses, particularly as part of an integrated medical offer.

## NET ADD. DEMAND FOR HEALTH PROFESSIONALS, 2021 – 2041: CONSERVATIVE SCENARIO

Practitioners	Existing Health Prof.	Ind. Additional Supportable Health Professionals				
		2021	2026	2031	2036	2041
Chiropractors	8	3.7	4.4	4.9	5.4	5.9
Dental Practitioners	30	15.7	18.1	20.4	22.2	23.9
GP's	43	18.0	21.3	24.3	26.6	29.0
Nurses and Midwives	732	-33.5	4.0	38.0	65.2	92.5
Occupational Therapists	27	14.4	16.6	18.6	20.2	21.8
Optometrists	10	2.4	3.1	3.7	4.2	4.7
Pharmacists	42	19.3	22.6	25.6	28.0	30.4
Physiotherapists	42	22.4	25.9	29.0	31.5	34.0
Podiatrists	8	1.6	2.1	2.6	3.0	3.3
Psychologists	54	23.9	28.0	31.8	34.9	37.9

*\*Based on existing provision of professionals across the Bathurst SA3, and future population growth*

## NET ADD. DEMAND FOR HEALTH PROFESSIONALS, 2021 – 2041: FORECAST.ID SCENARIO

Practitioners	Existing Health Prof.	Ind. Additional Supportable Health Professionals				
		2021	2026	2031	2036	2041
Chiropractors	8	3.7	4.4	5.3	6.1	6.7
Dental Practitioners	30	15.6	18.4	21.8	24.9	27.2
GP's	43	17.9	21.7	26.1	30.4	33.3
Nurses and Midwives	732	-34.3	8.5	59.4	108.0	142.0
Occupational Therapists	27	14.3	16.8	19.9	22.7	24.8
Optometrists	10	2.4	3.2	4.1	4.9	5.5
Pharmacists	42	19.2	23.0	27.5	31.7	34.7
Physiotherapists	42	22.3	26.3	31.0	35.5	38.6
Podiatrists	8	1.6	2.2	2.9	3.5	4.0
Psychologists	54	23.8	28.5	34.2	39.6	43.4

*\*Based on existing provision of professionals across the Bathurst SA3, and future population growth*



# COMPARABLE EXAMPLES

## MIXED-USE MEDICAL DEVELOPMENTS

### GARDENS MEDICAL CENTRE, ALBURY

Gardens Medical Centre is an eight-storey mixed-use development located at 580 Smollett Street in Albury. The cost of construction of this development was similar to that of the proposed BIMC.

The facility comprises total floorspace of 10,900 sq.m, which comprises medical and related uses and employs up to 500 persons.

Gardens Medical Centre attracts visitation in the order of 14,000 persons per week – or annual volumes of around some 728,000 persons.

The centre has not recorded a single vacancy in 12 years of operation.



### BLOOMFIELD MEDICAL CENTRE, ORANGE

Bloomfield Medical Centre is a recently-developed mixed-use medical facility located along Forest Road in Orange. The site is located south of the Orange City Centre and is directly opposite Orange Base Hospital.

The development includes a short-stay and overnight hospital, medical centre, radiology, pathology, pharmacy, a GP clinic, specialist consulting, after-hours clinic, Charles Sturt University Medical School and a café. The property forms part of a newly-designated 'Life Sciences Precinct.'

Total net lettable area for the site is some 11,962 sq.m, with associated car parking of around 320 spaces. Construction was completed in 2019. The project is considered a state-of-the-art example of medical mixed-use development.



# ECONOMIC BENEFITS

The proposed Bathurst Integrated Medical Centre (BIMC) would result in a range of important economic benefits which will be of direct benefit to the local community. These key positive impacts include:

- The provision of a wider range of medical facilities within the region.
- Increased convenience for residents and workers.
- Improved customer amenity, design and aesthetic for the residents by way of a new and modern development.

CBD's play fundamental roles in the economies of Australia's regional cities, having developed around the need to meet consumer demand across a range of categories. The nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as:

- Increasing time pressures on working families.
- Population and income growth.
- The evolution of new formats and traders.
- Competitive developments and precincts.

The demands of consumers, as well as service providers, combine to add pressure for additional floorspace within existing precincts.

There is a strong need for additional medical facilities within Bathurst and the broader catchment area, given the existing level of undersupply of medical professionals in many fields throughout the region.

If facilities such as the subject development were to be provided beyond an established precinct, such as a suburban setting or fringe location, this could have the effect of detracting from the City Centre, drawing visitors and workers away, as well as foregoing any flow-on benefits to surrounding businesses.

Over the past decade, there has been an increasing trend towards co-location and precincting of medical facilities – enabling one-stop servicing.

This trend has been largely driven by broader social trends that have resulted in consumers becoming more time poor, such as longer working hours and an increase in the number of women in the labour force. The BIMC would directly address this demand in Bathurst.

Time pressures are ranked at the top of the list of issues that consumers face when undertaking shopping or general day to day tasks. As a result, there is growing demand for convenience to meet the needs of residents.

The design of the proposed BIMC, including GP clinics, a private hospital, ancillary medical suites, radiology, pathology and a pharmacist, as well as significant and easily-accessible car parking, would be highly convenient for local families and workers.

Relocating the existing private hospital into the Bathurst CBD will significantly enhance co-location opportunities for additional health specialities and allied health services given the high-profile location, the wide range of surrounding uses, and the increased amenity that will be provided.

Further, the addition of traditional medical and ancillary facilities to the Bathurst CBD and broader catchment area would satiate some of the existing and future undersupply that has developed, as well as providing residents with a state-of-the-art facility that is comparable with services typically available to metropolitan Sydney residents.

The concept and design of the centre is at the forefront of modern medical and mixed-use development trends – the likes of which are typically reserved for inner-city metropolitan regions.



# ECONOMIC BENEFITS

BIMC will provide brand new infrastructure to expand and to retain important Bathurst medical resources and specialties. It will include state of the art modern facilities with a Private Hospital, General Practice, Specialist Practice, Radiology, Pathology, Allied Health, Pharmacy and Café, forming an effective single destination for most health needs.

As at the Census 2016, Health Care and Social Assistance accounted for 2,619 workers across the Bathurst SA3.

The industry accounts for 13.3% of all jobs in the region, to be easily the largest, with Education and Training (11.9%), and Retail Trade (10.6%) the next largest employers.

The importance of the Health Care and Social Assistance industry has increased overtime, from 10.2% in 2006 to 11.3% in 2011. In comparison, retail trade employment has decreased over the same period, and employment in Education and Training has only slightly increased.

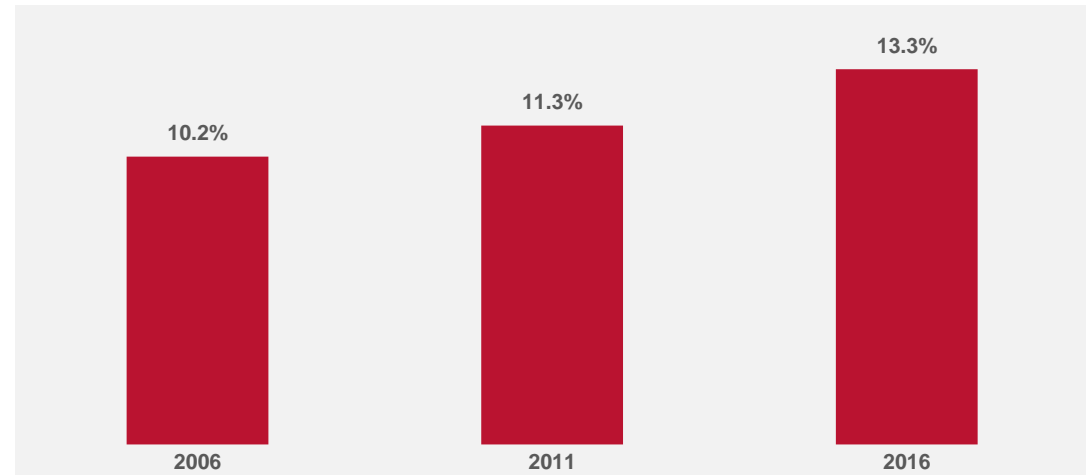
The BIMC will continue to reinforce the opportunities in Health Care and Social Assistance and provide a modern, best in class facility that will retain residents and workers locally, and attract new talent and services to the region.

The redevelopment of the George Street Carpark will provide a new modern, multi-deck car park for use by BIMC staff and patients, RSL members, and the general public.

The facility will comprise some 915 car spaces, a substantial increase from the current 330 car spaces. This will be a great benefit to all facilities in the CBD as well as residents by providing a higher level of convenience and amenity.

The new carpark result in undercover spaces and greater security and will also be able to be easily added to in the future, to meet the future needs of CBD users.

## BATHURST SA3 WORKERS - HEALTH CARE AND SOCIAL ASSISTANCE (%)



The development of the BIMC and the George Street Carpark will also deliver the following benefits:

- A fully landscaped pedestrian thoroughfares through the site, creating connectivity between the RSL Club, the CBD, retail shops, the Carillon and surrounding parkland.
- Design and construction with proper respect and consideration to the fabric of Bathurst's heritage landscape.
- Maintaining and improving site amenity for adjacent stakeholders.
- Future proofing the site for the growth of Bathurst.
- Maximising 'green' outcomes with energy efficient buildings, solar power generation, electric vehicle chargers, rainwater re-use and the like.

# ECONOMIC BENEFITS

The proposed development would enjoy a high-profile location in the Bathurst CBD, which would be very convenient and easily accessible for the local population and passing traffic. The CBD location is adjacent to a range of other retail, commercial, and recreation uses and this would allow a high level of cross-usage.

The development would complement and strengthen the Bathurst CBD and provide cross shopping benefits for other retail and complementary non-retail facilities in the immediate area. The location would also limit car-based trips which would occur if the site was in an outer suburban location – given visitors to the BIMC will be able to park in the new George Street carpark and access multiple CBD locations from the single parking location, without the need to move their cars in-between (cross-visitation). The site would also have a high level of exposure.

The addition of a small pharmacy of 100 sq.m and two cafes of a combined 378 sq.m would be a small increase of the total retail floorspace in the Bathurst CBD. Indicatively, this floorspace would achieve sales of around \$4 million, or less than 0.5% of total retail spending. The impacts on nearby floorspace would be limited.

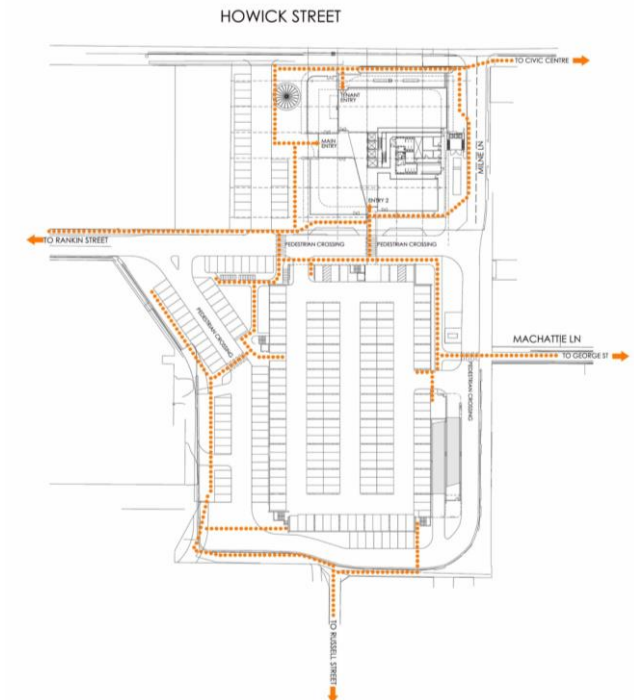
The selection of the CBD location also takes into consideration the under-utilisation of the recently constructed health facilities at the Charles Sturt University site. The prospect of additional major facilities outside of the CBD would create more space where there is already an apparent lower demand (demonstrated by the lower occupancy rate at CSU). The demand for a CBD site, on the other hand, is clear; given the full ground floor and three of the five upper floors of the BIMC already have pre-leasing commitments.

The staff, patients, and companions/visitors to BIMC and users of the redeveloped George Street Carpark would add to visitation to the Bathurst CBD as well as increase dwell time. This would likely result in spin-off benefits for the other facilities in the Bathurst CBD.

The experience of The Gardens Medical Centre in Albury and the recently opened Bloomfield Medical Centre in Orange shows that these types of facilities are very popular with practitioners and patients alike. Both facilities are strongly occupied and regularly busy. In the order of 14,000 persons per week – or annual volumes of around some 728,000 persons are recorded at the Albury facility. The BIMC would be expected to attract similar volumes.

Even small cross-shop volumes, such as 50% of visitors spending an additional \$20 nearby would represent some \$7 million in localised expenditure each year. If the BIMC or similar development were to locate outside of the CBD, the cross-visitation benefits would be dramatically reduced and possibly inverted, whereby workers and visitors are drawn away from the City Centre.

## BIMC - MODELLLED PEDESTRIAN FLOWS



# ECONOMIC BENEFITS

## ONGOING EMPLOYMENT

The employment benchmarks (jobs per 1,000 sq.m) used to calculate the indicative total jobs generated is based on typical floorspace and employment yield benchmarks. The retail component of the development is projected to employ around 26 persons, while the medical component of the development is projected to employ around 411 persons (437 total).

Taking a conservative view and allowing for an estimated 10% of the total increase to be because of reduced employment at existing facilities, net additional jobs are estimated at 393 across both components. Based on Average Weekly Earnings data released by the ABS, the additional permanent employees would earn combined total salary/wages of some \$24 million as a direct result.

In addition, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities through ancillary businesses/suppliers, as well as additional consumption expenditure by workers within the precinct (spending wages).

By using the appropriate ABS Input/Output Multipliers, it is estimated that an additional 318 jobs will be created indirectly, yielding a total of 711 ongoing jobs as a result of the development.

Information from .id Consulting indicates that the combination of all direct, industrial and consumption effects would result in total estimated rise in Output of \$43.23 million in Bathurst LGA economy, or value added of \$24.11 million.

## ONGOING EMPLOYMENT GENERATING FLOORSPACE

Component	Total Floorspace	Employm. per 1,000 sq.m	Indic. Total Jobs	Net Increase <sup>1</sup>	Employment Multiplier Effects	Total Employment
<b>Retail</b>	(sq.m)					
Café	178	60.0	11	10	9	19
Café Outdoor Dining	200	60.0	12	11	10	21
Pharmacy	100	30.0	3	3	3	5
<b>Medical &amp; Ancillary Services</b>						
Radiology	800	45.0	36	32	26	58
GP Clinic	1,469	45.0	66	59	48	107
Pathology	250	45.0	11	10	8	18
Medical Education & Research	1,819	50.0	91	82	65	147
Allied Health	2,019	45.0	91	82	65	147
Specialist Consulting Rooms	800	45.0	36	32	26	58
Private Hospital	2,398	33.3	80	72	58	129
<b>Total</b>	<b>10,033</b>		<b>437</b>	<b>393</b>	<b>318</b>	<b>711</b>

1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development

Source : Australian National Accounts: Input-Output Tables 1996-97





# ECONOMIC BENEFITS

## CONSTRUCTION

Construction of the sites would also generate significant employment within associated industries during the development of the project

Construction is estimated to incur total capital costs of some \$89.3 million, including \$70 million from the BIMC and some \$19.3 million from the George Street Carpark.

By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of \$51.3 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed retail, commercial and car park component would directly create some 359 full-time, part time and temporary jobs over the development timeline.

Once again, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities. Based on industry multipliers, and additional 575 jobs are estimated to be created indirectly, yielding a total of 934 jobs in combination as a result of construction.

## CONSTRUCTION-GENERATED EMPLOYMENT

Metric	Commercial Floorspace	Car Park	Combined Total	Employment Multiplier Effects	Total Employment
<b>Estimated Capital Costs of Construction</b>					
Estimated Capital Costs 2020/21 (\$M)*	\$70.0	\$19.3	<b>\$89.3</b>	-	-
Estimated Capital Costs 1996/97 (\$M)	\$40.19	\$11.1	<b>\$51.3</b>	-	-
<b>Direct Employment Generation</b>					
Construction Jobs per \$1 million (2020/21)	4.02	4.02	<b>4.02</b>	6.44	-
<b>Total Construction Jobs<sup>1</sup></b>	<b>281</b>	<b>78</b>	<b>359</b>	<b>575</b>	<b>934</b>

*Employment totals include both full-time and part-time work.*

*Source : Australian National Accounts: Input-Output Tables 1996-97*

*Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year*

Information from .id Consulting indicates that the combination of all direct, industrial and consumption effects of construction (of both components) would result in total estimated rise in Output of \$141.47 million in Bathurst LGA economy, or value added of \$56.11 million.

## OTHER ECONOMIC BENEFITS

In addition, the creation of additional foot traffic to this part of the Bathurst CBD is likely to generate additional spend, and consequently, employment.

As a guide, Gardens Medical Centre attracts visitation in the order of 14,000 persons per week – or annual volumes of around some 728,000 persons. The BIMC would be expected to attract similar volumes.

Even small cross-shop volumes, such as 50% of visitors spending an additional \$20 nearby would represent some \$7 million in localised expenditure each year.



# SUMMARY

It is the conclusion of this report that a substantial net community benefit would result from the development of the proposed Bathurst Integrated Medical Centre and the redevelopment of the George Street Carpark, including the following:

- **Aligned With Planning Strategy:** The site is zoned B3 Commercial Core with all uses proposed being permitted at the subject site. The objectives of the B3 Commercial Core zoning include providing a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community; and to encourage development that confirms the role of the Bathurst central business district as the primary retail and business centre in the region.
- **High Profile Location:** The high-profile site in the Bathurst CBD is close to a range of other facilities that would complement the BIMC.
- **Improved Range of Facilities:** BIMC will provide brand new infrastructure to expand and to retain important Bathurst medical resources and specialties. It will include state of the art modern facilities with a Private Hospital, General Practice, Specialist Practice, Radiology, Pathology, Allied Health, Pharmacy and Café, forming an effective single destination for most health needs.
- **Quality, Best-in-Class Design:** The design of the proposed BIMC across a vertical building with a significant and easily-accessible car park, would be highly convenient for local families and workers. The concept and design of the centre is at the forefront of modern medical and mixed-use development trends – the likes of which are typically reserved for inner-city metropolitan regions.
- **Satiating Undersupply of Facilities:** The addition of traditional medical and ancillary facilities to the Bathurst CBD and broader catchment area would satiate some of the existing and future undersupply that has developed, as well as providing residents with a state-of-the-art facility that is comparable with services typically available to metropolitan Sydney residents.
- **Activation of Precinct:** The staff, patients, and companions/visitors to BIMC and users of the redeveloped George Street Carpark would add to visitation to the Bathurst CBD as well as increase dwell time. This would likely result in spin-off benefits for the other facilities in the Bathurst CBD. As a guide, Gardens Medical Centre (Albury) attracts visitation in the order of 14,000 persons per week – or annual volumes of around some 728,000 persons. The BIMC would be expected to attract similar volumes. If this or a similar development were to locate outside of the CBD, the cross-visitation benefits would be dramatically reduced and possibly inverted, whereby workers and visitors are drawn away from the City Centre.
- **New Car Park for the Bathurst CBD:** The facility will comprise some 915 car spaces, a substantial increase from the current 330 car spaces. This will be a great benefit to all facilities in the CBD as well as residents by providing a higher level of convenience and amenity. The new carpark result in undercover spaces and greater security and will also be able to be easily added to in the future, to meet the future needs of CBD users. From a single car trip to the George Street carpark, people can access the BIMC and other CBD locations without the need to move their cars between venues.
- **Ongoing Employment:** it is estimated that an additional 711 ongoing jobs would be generated as a result of the development, both directly and indirectly. Information from .id Consulting indicates that the combination of all direct, industrial and consumption effects would result in total estimated rise in Output of \$43.23 million in Bathurst LGA economy, or value added of \$24.11 million.
- **Construction Employment:** Construction is estimated to incur total capital costs of some \$89.3 million (including the BIMC and George Street Carpark). Based on industry benchmarks and multipliers, a total of 934 jobs are expected to be generated in combination as a result of construction. Information from .id Consulting indicates that the combination of all direct, industrial and consumption effects of construction (of both components) would result in total estimated rise in Output of \$125.74 million in Bathurst LGA economy, or value added of \$56.11 million.



02 8248 0100  
Suite 5, Level 27, 25 Martin Place, Sydney, NSW, 2000  
[locationiq.com.au](http://locationiq.com.au)