

30 January 2020

Cambridge Unit Developments Pty Ltd
c/- Chris Ryan
Ionic Management Pty Ltd

Sent via email: cryan@imanager.net.au

Dear Chris

Re: 143A Stoney Creek Road, Beverly Hills Needs Assessment for Medical and Health-related Uses

Thank you for inviting Atlas Urban Economics (Atlas) to investigate the need for medical and health-related uses in the Beverly Hills region to assist with development planning for a site at 143A Stoney Creek Road, Beverly Hills (referred to as 'the Site').

KEY OBJECTIVES AND APPROACH

In order to investigate the likely demand for medical and health-related land uses that could be supported in a redevelopment of the Site, Atlas has taken the following approach:

- Baseline socio-demographic analysis to understand;
 - Key socio-demographic characteristics that influence demand for medical and health-related uses;
 - Existing and future population in the Georges River local government area (LGA) to understand the quantum of growth projected (including different age cohorts).
- Land use audit to identify the number of medical and health-related facilities in the defined Beverly Hills catchment area.
- Review of the development pipeline to ascertain the quantum and type of medical/health-related supply proposed in the Beverly Hills catchment area.
- Benchmarking analysis to compare the results from the socio-demographic analysis against supply (existing and proposed) from the land use audit to ascertain opportunities available for the Site to meet unmet need.

DEFINITIONS AND TERMS

This analysis investigates the supply and demand situation of general practice medical services and allied health services as defined below.

General Practitioner/ General Practice Medical Services

According to the Royal Australian College of General Practitioners a general practitioner (GP) plays a central role in the delivery of health care to the Australian community.

In Australia, the GP:

- Is typically the first point of contact in matters of personal health.
- Coordinates the care of patients and refers patients to other specialists.
- Cares for patients in a whole-of-person approach in the context of their work, family and community.
- Cares for patients of all ages, both sexes, children and adults across all disease categories.
- Cares for patients over a period of their lifetime.
- Provides advice and education on health care.
- Performs legal processes such as certification of documents or provision of reports in relation to motor transport or work accidents.

General practices provide person-centred, continuing, comprehensive and coordinated wholeperson health care to individuals and families in their communities.

Allied Health Services

According to Allied Health Professions Australia (AHPA) allied health is a sub-set of the Australian health professions that does not include medical, nursing or dental professionals.

The Australian Department of Health defines allied health to include the following: Aboriginal and Torres Strait Islander (ATSI) health practitioners, Chinese medicine practitioners, chiropractors, medical radiation practitioners, occupational therapists, optometrists, osteopaths, pharmacists, physiotherapists, podiatrists, and psychologists. These were the 11 professions included in the National Registration and Accreditation Scheme (NRAS) on 1 July 2012.

Other allied health professions that are not included under NRAS but are considered in the Commonwealth's health workforce policy planning include audiologists, counsellors, dietitians, physiologists, therapists, nutritionists, social workers, sonographers and speech pathologists.

THE SITE AND CATCHMENT AREA

The Site at 143A Stoney Creek Road, Beverly Hills is a large corner block measuring some 2,454sqm in site area located circa 100m south-west of the southern edge of the Beverly Hills town centre.

The Site is unoccupied and improved with a single level commercial building formerly occupied by Service NSW as a motor registry. The Site is zoned part SP2 Infrastructure and part R2 Low Density Residential under the Hurstville Local Environmental Plan 2012.

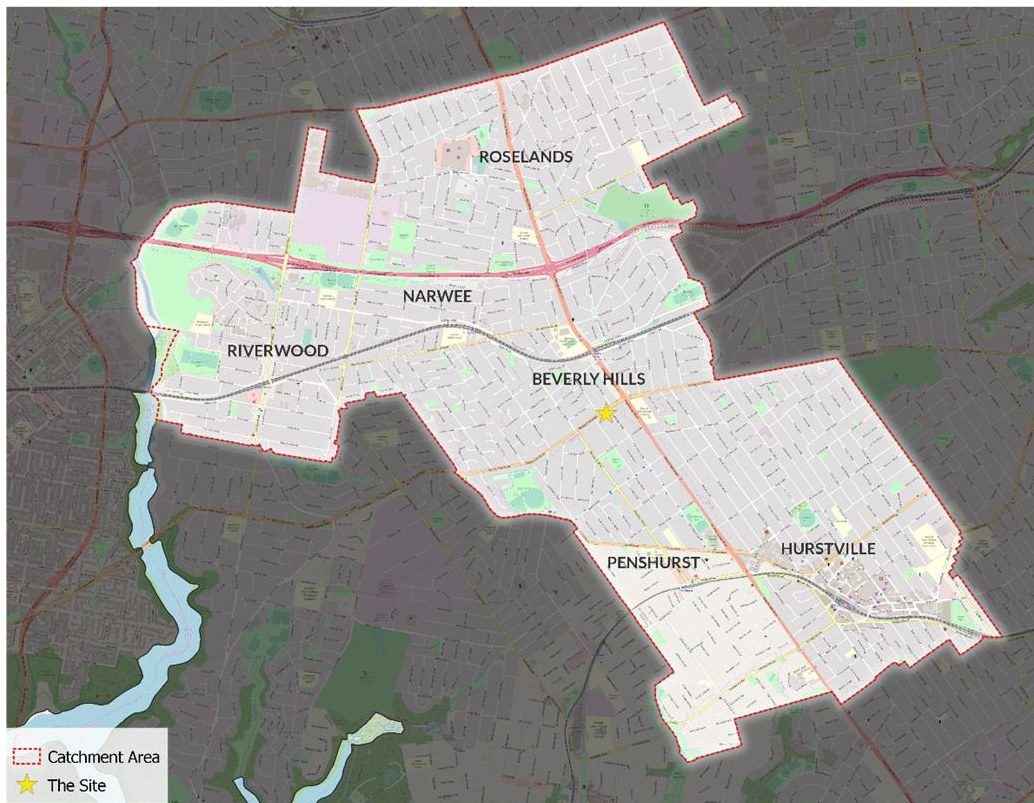
Surrounding land uses are a mix of detached housing, low-rise apartment buildings and commercial buildings along King Georges Road forming part of the Beverly Hills town centre. A number of larger apartment buildings have been progressed along Hampden Street immediately north in recent years.

In order to understand the nature of demand for medical and healthcare-related land uses, it is useful to consider both the current and historical socio-demographic profile of residents. This is important as it provides insight into the current profile of residents and facilitates an understanding of their needs.

Georges River Council and City of Canterbury-Bankstown in partnership with .ID define a series of distinct profile areas within the both LGAs from which socio-demographic analysis of Census data has been undertaken. The Site is within 10-15 minute commute to a number of these areas (referred to as the 'Catchment Area').

For comparative purposes, the socio-demographic profile of the Catchment Area has also been compared to the Georges River LGA.

Figure 1 : Catchment Area



Source: Atlas, Georges River Council, .ID

SOCIO-DEMOGRAPHIC ANALYSIS

This section details the findings of the socio-demographic analysis that are of direct relevance to demand for medical and healthcare-related land uses. Population characteristics investigated include population growth (historic and projected), age composition, family and household composition and level of socio-economic disadvantage.

Historic Population Growth

The Estimated Resident Population (ERP) of the Catchment Area in June 2018 was recorded as almost 89,000 residents.

Table 1 : Estimated Residential Population (2016-2018), Catchment Area

Locality	Population			Annual Growth		
	2016	2017	2018	2016-17	2017-18	2016-18
Georges River LGA						
Beverly Hills-Narwee	11,132	11,340	11,432	208	92	300
Penshurst	13,346	13,557	13,570	211	13	224
Hurstville City Centre	7,182	7,461	7,526	279	65	344
Hurstville (remainder)	23,666	24,290	24,736	624	446	1,070
Riverwood	6,127	6,259	6,469	132	210	342
Canterbury-Bankstown LGA						
Narwee- Beverly Hills	5,465	5,525	5,606	60	80	140
Riverwood	6,593	6,796	7,029	203	232	435
Roselands	12,165	12,274	12,352	108	78	186
Catchment Area	85,676	87,502	88,720	1,825	1,216	3,041
Georges River LGA	153,161	156,435	158,411	3,274	1,976	5,250

Source: ABS (2017) compiled by .ID (2017)

Over 2006-2016, the Catchment Area grew by some 14,500 residents at an average annual rate of 2.0%. Notably, this rate of growth is faster than that observed in the Georges River LGA (1.5%).

Table 2: Historic Population Growth (2006-2016), Catchment Area

Locality	Population			Avg. Annual Growth		
	2006	2011	2016	2006-11	2011-16	2006-16
Georges River LGA						
Beverly Hills-Narwee	9,285	9,966	10,726	1.4%	1.5%	1.5%
Penshurst	10,946	11,787	12,898	1.5%	1.8%	1.7%
Hurstville City Centre	4,142	5,133	6,855	4.4%	6.0%	5.2%
Hurstville (remainder)	18,644	20,178	22,590	1.6%	2.3%	1.9%
Riverwood	4,859	5,358	5,919	2.0%	2.0%	2.0%
Canterbury-Bankstown LGA						
Narwee- Beverly Hills	4,510	4,798	5,234	1.2%	1.8%	1.5%
Riverwood	5,111	5,028	6,358	-0.3%	4.8%	2.2%
Roselands	10,094	11,039	11,544	1.8%	0.9%	1.4%
Catchment Area	67,591	73,287	82,124	1.6%	2.3%	2.0%
Georges River LGA	126,337	134,660	146,841	1.3%	1.7%	1.5%

Source: ABS (2017) compiled by .ID (2017)

Age Composition

The Catchment Area is characterised by a relatively young population; almost 32% of residents were aged between 20 and 39 years old in 2016. This generally aligns with that age composition of the Georges River LGA. Older residents (55 years and older) also account for a significant proportion of the local population at approximately 26%.

Over 2011-2016, the Catchment Area saw most growth in residents aged between 20-34 years old with these residents accounting for almost 60% of all new residents. Residents over 55 years old also grew strongly, albeit at more moderate rates compared to the Georges River LGA.

Figure 2: Age Profile (2016), Catchment Area



Source: ABS (2017) compiled by .ID (2017)

Family and Household Composition

As at 2016, there were approximately 25,990 households residing in the Catchment Area. The overwhelming majority of these were family households (71%), mostly couples with children which accounted for almost 37% of all households in the Catchment Area. Couples without children were the second largest household type at 20.4% of all households, closely followed by lone persons at 20.1%. The proportion of lone person households in the Catchment Area is greater compared to Georges River LGA.

Table 3: Household Composition (2011-2016), Catchment Area

Household Type	Catchment Area				Georges River LGA			
	2011		2016		2011		2016	
	No.	%	No.	%	No.	%	No.	%
Couples with children	8,812	35.8%	9,573	36.8%	18,332	37.9%	19,264	38.0%
Couples no children	5,042	20.5%	5,297	20.4%	11,119	23.0%	11,572	22.8%
One parent families	3,072	12.5%	3,166	12.2%	5,206	10.8%	5,435	10.7%
Other families	415	1.7%	460	1.8%	779	1.6%	869	1.7%
Total Families	17,341	66.7%	18,496	71.2%	35,436	73.2%	37,140	73.3%
Group household	833	3.4%	1,121	4.3%	1,713	3.5%	2,197	4.3%
Lone person	5,270	21.4%	5,231	20.1%	9,749	20.1%	9,331	18.4%
Other households	993	4.0%	1,019	3.9%	1,239	2.6%	1,676	3.3%
Visitor-only	137	0.6%	101	0.4%	283	0.6%	312	0.6%
Total households	24,597	100.0%	25,990	100.0%	48,420	100.0%	50,656	100.0%

Source: ABS (2017) compiled by .ID (2017)

Projected Population Growth

Population projections provided by the Department of Planning, Industry and Environment (DPIE) are available at the LGA level. Inferences can be made on the likely growth rates that will be observed within the Catchment Area by considering historical growth rates. To this end, it is observed that the Catchment Area has historically recorded greater population growth compared to Georges River LGA.

Table 4: Population Projections (2016-2041), Georges River LGA

	2016	2021	2026	2031	2036	2041
Georges River LGA	153,161	161,521	173,604	179,982	182,983	190,221
Change (5-yrs)		8,360	12,083	6,378	3,001	7,238
Avg. Annual Growth		1.1%	1.5%	0.7%	0.3%	0.8%
Greater Sydney	4,688,255	5,252,611	5,746,821	6,211,970	6,661,720	7,103,091
Change (5-yrs)		564,356	494,210	465,149	449,750	441,371
Avg. Annual Growth		2.3%	1.8%	1.6%	1.4%	1.3%

Source: DPIE (2019)

The existing population of the Georges River LGA and is expected to grow by just over 37,000 residents from 2016 to 2041, representing an average annual growth rate of 0.9%. From 2021, Georges River is expected to accommodate an additional 1,150 residents per annum. Just over 80% of this growth is to be attributed to natural change, with the remaining 20% expected from net migration. Notably, an additional 8,200 migrants are expected to be reside in the LGA over the 2016-2026 period.

Projections indicate that the number of residents aged 65 years and older is set to increase significantly, rising from 15% of the population in 2016 to over 20% by 2041. This is not a unique trend to the Georges River LGA but reflects the overall ageing of the Greater Sydney region over the coming decades.

Small Area Population Forecasts

In consultation with Georges River Council and the City of Bankstown-Canterbury, small area population forecasts to 2041 have been prepared by .ID. These small area forecasts, unlike DPIE population projections

consider zoning and land use capacity in the respective small area to accommodate growth. Whilst these forecasts have not incorporated the most recent DPIE population projections (DPIE, 2019), they are a useful indicator of expected population growth over the short to medium term.

Table 5: Population Forecasts (2016-2036), Catchment Area

	2016	2021	2026	2031	2036
Catchment Area	85,519	91,655	98,176	104,217	110,859
Change (5-yrs)		6,136	6,521	6,041	6,642
Avg. Annual Growth		1.4%	1.4%	1.2%	1.2%
Georges River LGA	153,450	162,794	170,524	177,933	185,346
Change (5-yrs)		9,344	7,730	7,409	7,412
Avg. Annual Growth		1.2%	0.9%	0.9%	0.8%

Source: DPIE (2019)

The resident population in the Catchment Area is forecast to rise to 110,859 persons by 2036 with strong growth expected between 2016 and 2026. Following 2026, population growth is forecast to grow more modestly.

SEIFA Index

Socio-Economic Indexes for Areas (SEIFA) is a product developed by the ABS that ranks areas in Australia according to relative socio-economic advantage and disadvantage. The indexes are based on Census data, including income, education levels and employment characteristics. The SEIFA index provides areas a ranking out of 100; a lower score on the index reflects a higher level of disadvantage.

As at 2016, the profile areas which comprise the Catchment Area which fall within the Georges River LGA (Beverly Hills-Narwee, Hurstville City Centre, Hurstville (remainder), Riverwood and Penshurst) and Canterbury-Bankstown (Narwee-Beverly Hills, Roselands and Riverwood) recorded SEIFA indexes ranging from 3 (Riverwood in Canterbury-Bankstown) to 54 (Penshurst in Georges River LGA).

These rankings are below that of the Georges River LGA (57) and Greater Sydney (56) and represent some of the lowest SEIFA indexes in NSW and Australia, reflecting the socio-economic issues facing these areas.

LAND USE AUDIT

Catchment Area

An audit of land uses in the Catchment Area was undertaken to review the quantum and nature of medical and healthcare professionals in the Catchment Area, specifically GPs and allied health practitioners.

The analysis indicates that there are approximately 68 GPs operating across 18 practices within the Catchment Area, totaling some 2,960sqm in floor area. There are also 46 specialist allied health clinics across the Catchment Area, accommodating 123 allied health practitioners ranging from physiotherapists, chiropractors, podiatrists, optometrists and psychologists.

Additionally, the Catchment Area accommodates 10 pathology clinics and three radiology centres.

The greatest number of GPs and allied health practitioners are located in Hurstville. The distribution of practitioners is summarised below.

- **Beverly Hills/ Narwee**

There are approximately four medical centres within the Beverly Hills/Narwee area accommodating five GPs and totaling some 520sqm in floorspace. There are four allied health centres (comprising 10 allied health practitioners at just over 400sqm in floor area).

There is one pathology clinic operating within the area; no radiology clinic was identified.

Comparing floor area against number of GPs in each facility, a GP/sqm ratio of one GP to 70sqm-137sqm of floor area is observed. Much lower ratios are identified for allied health practices - ratios from one practitioner to 10sqm-60sqm are observed.

- **Roselands**

There are two medical centres and two GP clinics operating in Roselands accommodating 10 GPs with around 570sqm of floorspace in total. There are six allied health centres accommodating 7 practitioners (mostly optometrists within the Roselands shopping centre).

There is one pathology clinic operating within the area; no radiology clinic was identified.

Observing the number of GPs in each practice by floor area (sqm), a ratio of 30sqm-90sqm of floor area is identified. Smaller ratios are identified for allied health practitioners with rates ranging from one practitioner to 25sqm-60sqm of floor area.

- **Riverwood**

There are four medical centres operating in Riverwood totaling around 450sqm of floorspace in total and accommodating 13 GPs and 9 allied health practitioners. There are four separate allied health providers (670sqm) which accommodate 14 allied health practitioners.

There is one pathology clinic operating within the area; no radiology clinic was identified.

The GP to floor area ratio within Riverwood ranges from 25sqm-50sqm of floor area. Similar ratios are assessed for allied health practitioners, ranging from one practitioner to 25sqm-80sqm of floor area (although there is one example of 160sqm).

- **Penshurst**

There is one medical centre within the Penshurst area accommodating five GPs (414sqm). There are four allied health centres which accommodate 20 allied health practitioners and total some 750sqm.

There is one pathology clinic operating within the area; no radiology clinic was identified.

Comparing the floor area of the only GP facility in Penshurst against the number of GPs operating therein produces a practitioner/sqm ratio of 69sqm of floor area. Much lower ratios are identified for allied health practices - ratios from one practitioner to 17sqm-63sqm are identified.

- **Hurstville/ Hurstville (remainder)**

A total of six medical centres are located within Hurstville with approximately 34 GPs and a total of 1,136sqm in floorspace. There is a large number of allied health centres (23) accommodating 55 allied health practitioners (a large number being physiotherapists and psychologists).

There are 6 pathology clinics operating across Hurstville (accounting for some 1,059sqm of floor area) and three radiology centres (circa 731sqm of floor area in total).

The GP to floor area ratio in Hurstville is found to range from 13sqm-36sqm of floor area (although there is one example of up to 150sqm). Similar ratios are observed for allied health practitioners, ranging from one practitioner to 14sqm-71sqm of floor area.

The Site is located within a 10km radius of the St George Hospital and Bankstown-Lidcombe Hospital. Both facilities are Tier 2 Major Public Hospitals with sizeable medical clusters. Owing to their size and range of services, both facilities have large patient catchments drawing from much of Greater Sydney.

A list of GPs and allied health practitioners within the Catchment Area precinct is included at Appendix A.

Future Supply

A review of the development pipeline was undertaken to ascertain the level of development activity in the medical and health-related floorspace within close proximity to the Site and broader Catchment Area.

The review has identified no ongoing medical/healthcare developments within the Catchment Area. The most recent developments were identified in the Hurstville City Centre, including the fitout of 99A Forest Road for an eye surgery and the conversion of the Waratah Medical Centre into a private hospital.

DEMAND ANALYSIS

Benchmark Ratio

While there is no nationally recognised 'ideal' medical workforce to population ratio (Royal Flying Doctor Service, 2013), increases in the ratio of doctors and nurses to the population over the past decade provide a sign that initiatives to increase supply are having some effect. However, the medical workforce remains unevenly distributed between the states and territories, and particularly between major cities and remote areas.

We have analysed the number of GPs and allied health practitioners against the population of Greater Sydney and NSW using Census employment and population data (ABS, 2012, 2017).

The number of GPs per 10,000 residents in Greater Sydney has risen over the 2006-2016 period; rising from 12 GPs per 10,000 residents in 2006 and 2011 to 13 GPs per 10,000 residents in 2016. This trend is also observed across the broader NSW region.

The number of allied health practitioners per capita across Greater Sydney and NSW has similarly risen over this period. In Greater Sydney, the number of allied health practitioners rose from 10 per 10,000 residents in 2006, 13 per 10,000 residents in 2011 to 16 per 10,000 residents in 2016. Interestingly, a slightly greater number of allied health practitioners per capita in NSW is recorded in 2016 (17).

The rise in allied health practitioners is not surprising. Growing awareness of health and wellness and an increased uptake in private health insurance (many policies offering 'extras' as part of the benefits) has expectedly resulted in a growing health and wellness sector.

For the purposes of this analysis, we consider appropriate to apply benchmarks of 13 doctors and 16 allied health practitioners per 10,000 persons. These benchmarks align with the identified ratios recorded for Greater Sydney.

Demand and Supply Assessment

In 2018, the ERP in the Catchment Area was 88,720 persons (ABS, 2018). When applying a benchmark of 13 doctors and 16 allied health practitioners per 10,000 residents, a need for about 115 GPs and 142 allied health practitioners is calculated.

The findings of the land use audit suggest 68 GPs and 123 allied health practitioners currently operate within the Catchment Area. Accordingly, an undersupply of about 47 GPs and 16 allied health practitioners is assessed.

When considering forecast population growth in the Catchment Area, benchmarking suggests there could be demand for some 144 GPs and 177 allied health practitioners by 2036.

Given the modest development activity in the pipeline, there could be an even greater shortfall in GPs to meet the future needs of the Catchment Area.

Table 6 details the findings of the benchmarking assessment for the Catchment Area.

Table 6: Benchmarking Assessment by No. of GPs/ Allied Health Practitioners, Catchment Area

Catchment Area	2018	2036
Population	88,720	110,859
<u>General Practitioners</u>		
Existing Supply	68	-
Required Supply	115	144
Over/ (Under Supply)	(47)	(76)
<u>Allied Health Practitioners</u>		
Existing Supply	123	
Required Supply	144	177
Over/ (Under Supply)	(16)	(54)

Source: Atlas

There is an assessed undersupply of 47 GPs and 16 allied health practitioners within the Catchment Area, which would significantly rise in coming years to 2036 if no new operators enter the market.

Population projections for the broader Georges River LGA to 2041 indicate the number and proportion of older residents is expected to rise in the coming decades. This could further drive demand for medical services (including allied health services) within the Catchment Area, beyond that anticipated by benchmarking analysis.

We highlight the limitations of the analysis where it is focused on a defined catchment. In reality, demand is not necessary 'contained' within artificially defined catchment boundaries. Depending on the expertise and specialty of a healthcare professional, demand for services may extend well beyond the defined local catchment area, That being said, the Catchment Area seeks to capture demand from within a reasonable distance (no more than 10-15 minute drive).

SITE SELECTION FACTORS

While medical facilities are destinational in nature, these services are still influenced by site and location selection factors to ensure their viability. Research suggests that the key locational requirements of a general practice medical centre are:

- Proximity and accessibility to local population.
- Situated within or adjacent to a centre and/ or retail facilities.
- Co-location with other health-related facilities such as allied health services.
- Proximity to public transport with on-site parking and provision of larger bays near the entrance for ambulance and handicapped persons.
- Good visibility and exposure.
- The Site is considered to meet all of these requirements and would be well-suited to accommodate a mix of medical and healthcare services.

While the Site bears advantageous location attributes, Beverly Hills is not an established or known for clustering of medical and health-related uses. Securing key practitioners will be instrumental in driving market appeal in the benefits of co-location for other practitioners.

CONCLUSION

In conclusion, there are positive findings in support of medical and health-related uses on the Site.

- The Catchment Area is a large population hub within the Georges River LGA. Population projections indicate the number of older residents in the area will progressively increase in the coming years.

- There are 68 GP's operating within the Catchment Area, mostly within the Hurstville City Centre.
- Benchmarking analysis indicates that based on the Catchment Area's population, there is a need for around 115 GPs. Accordingly, there is a current shortfall of about 47 GPs.
- If there was no further provision, the shortfall of GPs would rise to 76 by 2036.
- There are 10 pathology clinics in the Catchment Area and three radiology clinics, mostly within Hurstville.
- The Site is well-suited for medical and health uses – it is highly accessible, benefits from good exposure and visibility and is located within walking distance of the Beverly Hills town centre.
- There is a role for the Site to play in accommodating some of the assessed latent demand for medical and health-related uses. The scale of a facility on the Site would depend on suitable business models and operational viability considerations.

Based on these key findings, there is an immediate opportunity for a medical practice development on the Site. Such a development would complement the existing Beverly Hills town centre which currently lacks a medical centre or allied health operator. There are also no medical or health-related developments in the pipeline, further illustrative of the opportunity in the short-term. The Site could also provide other medical and health-related uses including pathology and/or radiology, both of which are not offered in the immediate surrounding area.

Should you require any additional information please contact the undersigned on (02) 8016 3834.

Yours sincerely,

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Director

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Appendix A: Medical Land Use Audit

Table A-1: Medical Land Use Audit, Catchment Area

Name	Location	General Practitioners (GPs)	Allied Health Practitioners	Distance from Site	Estimated Floor Area (sqm)
Beverly Hills/Narwee					
Beverly Hills Medical Service	109 Morgan St	2	-	0.6km	140
Kingsgrove Medical Service	496 King Georges Rd	1	-	0.4km	137
St Jude Family Medical Centre	107 Mercury St	1	-	1.2km	116
Narwee Family Practice	4 Fisher Pl	1	-	1.2km	133
Thomas Y Wong	460 King Georges Rd	-	1	1.0km	135
Beverly Hills-Kingsgrove Physiotherapy Sports Injury	536 King Georges Rd	-	3	0.2km	180
Bruce Stevenson Chiropractor	423 King Georges Rd	-	1	0.4km	50
Wellbe Bulk-Billing Counselling & Psychology	423 King Georges Rd	-	5	0.4km	50
Laverty Pathology	139 Morgan St	-	-	0.5km	200
Sub-total		5	10		1,141
Penshurst					
Ashby Medical Centre	1/84 Penshurst St	6	-	1.2km	414
Penshurst Physiotherapy Centre	115-117 Stoney Creek Rd	-	6	0.3km	270
Roseland Physiotherapy	556 Forest Rd	-	2	1.0km	126
Penshurst Street Physiotherapy	49 Penshurst St	-	5	1.3km	120
Dr. Hook Rod N Chiropractor	135 Penshurst St	-	1	0.4km	140
Penshurst Podiatry Centre	9 Bridge St	-	6	1.5km	100
Laverty Pathology	Shop 1/60 Penshurst St	-	-	1.3km	100
Sub-Total		6	20		1,270
Hurstville					
Wales Medical Centre	277-279 Forest Rd	5	-	2.2km	150
Simin Centre of Chinese Medicine	10-12 Woodville St	-	1	2.3km	136

Name	Location	General Practitioners (GPs)	Allied Health Practitioners	Distance from Site	Estimated Floor Area (sqm)
Myhealth Medical Centre Hurstville	Westfield Hurstville	8	7	2.5km	100
Hurstville Medical Practice	1 Park Rd	14	-	2.6km	500
One Avenue Medical Centre	1 The Avenue	1		2.6km	150
Hurstville Highpoint Medical Centre	458-460 Forest Rd	6	-	1.7km	100
Hurstville Sports Injury Clinic	23-27 Macmahon St	-	1	2.3km	50
Hurstville Forest Mall Physiotherapy	Westfield Hurstville	-	3	2.5km	60
Hurstville Physio Plus	26 Ormonde Pde	-	5	2.5km	183
Xluo's Physiotherapy	14-16 Ormonde Pde	-	1	2.5km	50
Physio Pilates & Therapy	181 Forest Rd	-	1	2.5km	71
Dora Street Physiotherapy	113 Dora St	-	3	1.6km	75
Back 2 Active Healthcare	88 Gloucester Rd	-	2	1.5km	100
Hurstville Chiropractic Centre	23-27 Macmahon St	-	2	2.3km	50
Jessie Nah Chiropractic Hurstville	14-16 Woodville St	-	1	2.3km	50
Eye Concepts Hurstville	128 Park Rd	-	1	1.9km	50
Joseph Do Podiatry	458-460 Forest Rd	-	1	1.7km	50
Orthotic Podiatry	14-16 Ormonde Pde	-	1	2.5km	50
Podiatry Now Orthotic Centre	208 Forest Rd	-	1	2.6km	65
New View Psychology	56A Gloucester Rd	-	1	1.6km	250
Southside Health & Wellbeing	23-27 Macmahon St	-	22	2.3km	300
Tracey Frazer-Change Psychology	7-11 The Avenue	-	1	2.6km	50
Clear Minds Professional Consultation Clinic	227 Forest Rd	-	1	2.6km	50
Vital Mind Psychology	12-14 Ormonde Pde	-	1	2.5km	50
Healthy Minds Psychology	1 Park Rd	-	1	2.6km	50
Sydney Clinical Forensic Psychology	208 Forest Rd	-	2	2.6km	65
New Vision Psychology Hurstville	7-11 The Avenue	-	1	2.6km	50
Innerwise Clinical Psychology	7-11 The Avenue	-	1	2.6km	50

Name	Location	General Practitioners (GPs)	Allied Health Practitioners	Distance from Site	Estimated Floor Area (sqm)
Clare Rowe	56A Gloucester Rd	-	1	1.6km	50
Laverty Pathology	Hurstville Private Hospital	-	-	1.6km	200
Laverty Pathology	Shop 1/1 Butler Rd	-	-	2.4km	150
Laverty Pathology	Suite 7, 185a Forest Rd	-	-	2.6km	127
Australian Clinical Labs	Westfield Hurstville	-	-	2.5km	200
Laverty Pathology	Ground Floor/10 Park Rd	-	-	2.5km	206
Douglass Hanly Moir Hurstville	8-10 The Avenue	-	-	2.6km	176
I-MED Radiology Network	225H Forest Rd	-	-	2.6km	150
Hurstville Imaging Centre	6 Ormonde Parade	-	-	2.5km	381
The Cross Radiology	Level 1/2 Cross St	-	-	2.5km	200
Sub-Total		34	63		4,795
Roselands					
Family Health Clinic	Roselands Shopping Centre	3	-	2.2km	100
Primacare Family Medical Centre Roselands	Roselands Shopping Centre	5	-	2.2km	150
Dr Fred Nasser	223 King Georges Rd	1	-	2.1km	230
Kanny Chow Physiotherapists	328 King Georges Rd	-	1	2.0km	55
Sydney Family Chiropractic	4/326 King Georges Rd	-	2	2.0km	85
Eyecare Plus Roselands	Roselands Shopping Centre	-	2	2.2km	50
OPSM ROSELANDS	Roselands Shopping Centre	-	1	2.2km	60
Bay Audio Hearing Experts	Roselands Shopping Centre	-	-	2.2km	50
Laverty Pathology	Roselands Shopping Centre	-	-	2.2km	100
Clear Vision Optical	Roselands Shopping Centre	-	1	2.2km	50
Dr J Kokkinos	113 Stoddart St	1		2.0km	90
Sub-Total		10	7		1,020
Riverwood					
Revival Medical Centre	264 Belmore Rd	2	-	2.7km	100

Name	Location	General Practitioners (GPs)	Allied Health Practitioners	Distance from Site	Estimated Floor Area (sqm)
Southside Medical Centre	250 Belmore Rd	3	-	2.7km	100
Caritas Medical Centre	1/198 Belmore Rd	3	5	2.7km	125
Riverwood Medical	221-223 Belmore Rd	5	4	2.7km	125
OST health - Physio + Allied Health	282 Belmore Rd	0	8	2.7km	209
Riverwood Plaza Chiropractic Centre	Riverwood Plaza	0	1	2.8km	50
South Riverwood Chiropractic	13 Webb St	0	2	2.9km	100
Eyecare Plus Optometrists	216A Belmore Rd	0	1	2.7km	160
Clear Mindset	172 Belmore Rd North	0	2	2.8km	159
Laverty Pathology	221-223 Belmore Rd	0	-	2.7km	100
Sub-Total		13	23		1,228
Catchment Area Total		68	123		8,226

Source: Atl