



LOT1 DP863214, 18 RANDWICK CLOSE, CASULA

Aged Care & Independent Living Need Assessment

Prepared for SummitCare
July 2020

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INTRODUCTION

This report presents an independent analysis of the need for prospective aged care and retirement living facilities at Lot1 DP863214, 18 Randwick Close in Casula. The assessment is structured and presented in **five (5) sections** as follows:

- **Section 1** provides an overview of the regional and local context of the Casula site and a summary of the planned development scheme.
- **Section 2** details the current and projected population levels within the defined catchment area likely to be served by aged care and independent living facilities at the Casula site. A summary of the socio-economic profile of the catchment population is also provided, as well as a more detailed review of the population aged 65 years and older.
- **Section 3** examines the potential for aged care facilities at the Casula site, including a review of demand, as well as current and future facilities.
- **Section 4** analyses the demand for independent living facilities across the catchment area, as well as summarising the potential for such facilities at the Casula site.
- **Section 5** outlines the needs analysis for the proposed aged care and independent living facility at Casula, including possible impacts and benefits.



EXECUTIVE SUMMARY

Key points to note regarding the potential for aged care and retirement living facilities at the Casula site include:

- i. The subject site is located at 18 Randwick Close, Casula and totals 13,194 sq.m in size. The proposed development will provide high quality seniors accommodation with excellent amenity and services, with key components including:
 - **Residential Aged Care:** a 142 bed residential aged care facility situated in Building A, including shared communal facilities and dining areas for residents and necessary commercial and administrative areas.
 - **Retirement Living:** a total of 93 independent living units will be provided across the three buildings. The site will also include a substantial range of community, entertainment and recreation facilities that will complement the overall offer
 - **Retail:** five small retail tenancies of 80 sq.m at ground level.
- ii. Based on discussion with SummitCare and a review of other aged care and independent living facilities in metropolitan areas, a catchment area has been defined for proposed facilities at Casula, as outlined within Section 2 of this report. This catchment area reflects the core resident market from which proposed facilities at Casula are likely to draw from, accounting for a range of social, economic and cultural considerations.

Supportability of Aged Care Facilities

- i. Based on the information outlined in this assessment, there is significant capacity for additional aged care facilities within the Casula catchment area over the medium to long term. There is solid potential for aged care facilities at the subject site, based on the following:
 - **Site Location:** the high-profile location of the site in close proximity to key retail, community and health facilities would be a key attractor. Casula also has excellent regional accessibility
 - **Significant and Growing Demand:** population growth, as well as the trend of ageing population is likely to add significantly to demand for aged care facilities, with a projected undersupply of some 1,170 places by 2036 (1,027 assuming the subject development).



- **Existing Supply:** aged care facilities within the catchment area are limited in number (particularly in and around the suburb of Casula) and characterised by relatively low vacancy rates.
 - **Location of Existing Facilities:** many existing catchment area facilities are located north/north-west of the South Western Motorway or on the outskirts of the catchment area.
 - **Quality of Competing Facilities:** a review of competing aged care facilities indicates that several are tired or old and are likely to require refurbishments/upgrades.
 - **Proposed Developments:** there is currently only four planned aged care developments (including the subject proposal) across the defined catchment area.
 - **Existing and Planned Site Composition:** the subject development is likely to provide a point of difference as one of the most modern, best-in-class facilities in the region. In addition, co-located independent living units would further add to the appeal of the site given age-in-place or transitional care prospects.
 - **Retention:** if a quality aged care facility could be provided at the subject site, there is an opportunity to reduce the level of leakage occurring to competing facilities beyond the catchment area and Liverpool LGA, as well as increasing/broadening the catchment area for the subject development.
- ii. Based on the demand assessment in Section 3.6 of this report, at least 1,568 additional places could likely be supported across the catchment area by 2036, not taking into consideration cannibalisation, leakage and changing penetration rates. This increased demand is projected to be met with an increase in supply of just 408 places in the short term. The level of need and demand is also sufficient to sustain all existing and proposed facilities throughout the catchment over the long term.

Supportability of Independent Living Facilities

- i. There are several key factors that would indicate that the Casula site and catchment area would represent a strong opportunity for independent living facilities:
- **Older population:** there is a growing number of aged persons within the catchment area.
 - **Wealth:** the subject site and broader catchment area form part of a mixed-income area who are likely to demand a range of housing choices and downsize options both now and in the future.
 - **Significant and Growing Demand:** population growth, as well as the trend of ageing population is likely to add significantly to demand for independent living facilities, with a current undersupply of 1,277 places (983 dwellings) across the catchment area, which is projected to increase to 2,673 places (2,056 dwellings) by 2036 excluding the subject development.
 - **Apartment Living:** the higher prevalence of apartment living throughout Liverpool and surrounds.



- **Attractive Location:** given the provision of retail and other community facilities in proximity, Casula is considered to be a highly desirable place to live.
 - **High Quality Development:** based on a review of the proposed independent living units offer, the subject development would be of an exceptionally high standard of quality, design and amenity.
 - **Integration of Uses:** independent living units or serviced apartments and aged care at the same site would allow residents to transition into aged care (from independent living) more seamlessly and minimises barriers to entry.
- ii. Based on the demand assessment in Table 4.4 of this report, at least 1,074 additional dwellings could likely to be supported across the catchment area by 2036 based on population growth alone, not taking into consideration cannibalisation, leakage and changing penetration rates. This increased demand is projected with no increase in supply (0 new dwellings given Willowdale has been assumed as completed) if the subject development were not to proceed. It is considered that there is strong need and demand to support the proposed independent living units at the subject site, as well as all existing and proposed facilities throughout the catchment over the long term.

Impacts

- i. Impacts on other aged care and retirement living facilities throughout the area would be well within the normal competitive range of less than 15%. Projected impacts from the proposed development would not threaten the viability or continued operation of any facility. Further, there would be no depletion or dilution in the range of services which are available to local residents, with key points to note including:
- **Aged Care:** the opening of the subject aged care facility of 142 beds in the catchment area would represent an increased provision of 7.7% currently and 6.3% by 2026. Further, demand for aged care facilities within the catchment area is projected to grow by some 98 aged care beds per year.
- In this respect, the Casula development would represent just 18 months of aged care demand and the additional capacity added to the market upon opening would likely be comfortably met with sufficient net additional demand – reflecting minimal or negligible cannibalisation (impacts).
- **Retirement Living:** the opening of the 93-unit retirement living development at the subject site would represent an increased provision of 17.5% across the catchment area. However, it is important to view this increase in the context of a significant undersupply of some 983 units, which indicates the catchment area could currently support more than double the existing supply level (630 dwellings).
- Further, demand for retirement living facilities within the catchment area is projected to grow by some 58 dwellings per year. In this respect, the Casula development would represent less than two

years of potential retirement living demand within a market that is drastically undersupplied for the product. In all likelihood, this pent-up demand (undersupply) would lead to the prospective independent living units being absorbed by demand from catchment area residents with negligible impacts on other facilities.

Net Community Benefits

- i. It is the conclusion of this report that a substantial net community benefit would result from the development of the proposed SummitCare aged care and retirement living development at Casula. Offsetting insignificant trading impacts on some existing facilities, there are very substantial positive impacts including the following:
- **Enhanced Range:** significant improvement in the range of facilities that would be available to local residents in terms of services, choice and amenity.
 - **Amenity & Vibrancy:** the proposed development would provide improved amenity, design and aesthetic for the local residents by way of a new and modern development. The revitalisation of the old and under-utilised site also improves enjoyment of private or public areas. Additional customer flows and vibrancy created through the precinct would positively impact on the other retail and non-retail facilities within the area such as community facilities and Casula Mall.
 - **Age in Place:** ageing in place allows residents to maintaining a sense of identity and independence to help ensure a high quality of life. Other benefits retained connectedness to the community, family and social networks, as well as a feeling of familiarity which can assist with mental and physical wellbeing. This type of product is especially important for couples in order to stay together when one partner requires a higher level of care than the other
 - **Best in Class:** the project will be a best-in-class facility for the local area and be at the forefront of development within the sector.
 - **Retention of Residents & Visitors:** the provision of additional facilities to an undersupplied catchment would result in the retention of residents (and visitors) currently relocating or frequenting other facilities beyond the region.
 - **Employment, Income & Economic Activity:** the local community will experience direct impacts and benefits originating from construction and operation of the proposed development, including the creation of some 1,168 jobs, ongoing wages of some \$27.1 million, as well as additional economic activity (revenue, cross-flows, visitation etc).
 - **Third Place:** the development would provide the local community with additional facilities that would serve as a 'third place', or informal settings where people can meet or be comfortably alone while



still engaging socially with the community. This provides additional opportunity for social integration and increases prospects of more seamless interactions between the community, which is important for health and wellbeing.

- **Community Aspirations:** the development also aligns with broader aspirations for the community, responding to core issues and reflecting a new positive vision/narrative for the area in several ways, including challenges presented in the *Community Strategic Plan* for Liverpool:
- ii. The development will not only facilitate enhanced social connection ‘within a community has become increasingly complex with the numerous demands of everyday life.’, but also provides an opportunity to follow the four directions for Liverpool, namely; creating connection, strengthening and protecting our environment, generating opportunity, and leading through collaboration.
 - iii. It is concluded that the combination of the substantial positive community and economic impacts serve to more than offset the impacts that could be anticipated for a wide-ranging variety of operators throughout the region.



1 LOCATION AND PLANNED COMPOSITION

This section of the report reviews the regional and local context of the Casula site and provides a summary of the planned development scheme.

1.1. Regional Context

- i. The suburb of Casula falls within the Liverpool City Council Local Government Area (LGA) in South Western Sydney, approximately 35 km from the Sydney Central Business District (CBD) (refer Map 1.1).
- ii. Casula is an established residential area to the south of the Liverpool Central Business Area (CBA) and is also located to the south of the large industrial area around Prestons.
- iii. Aged care services in Australia are funded and delivered in regions called Aged Care Planning Regions (ACPRs). Across Australia, there are some 73 ACPRs, with Casula falling within the South West Sydney region of New South Wales (refer Map 1.2).
- iv. Casula is easily accessible for both the wider and local region population, being bounded to the north and west by the South Western Motorway (M5) and with the Hume Highway also passing through the middle of the suburb. The South Western Motorway (M5) connects to the Sydney CBD in the east and to Campbelltown and the Outer South Western region of Sydney.
- v. In addition, frequent bus services including Routes 851, 852, 865, and 867 pick up from the north-west of the site, along Kurrajong Road, which provide access to the Liverpool CBA as well as Harrington Park, Catherine Field, Leppington, Prestons, Horningsea Park, West Hoxton, Austral and Bringelly (refer Figure 1.1).



MAP 1.1. CASULA REGIONAL CONTEXT

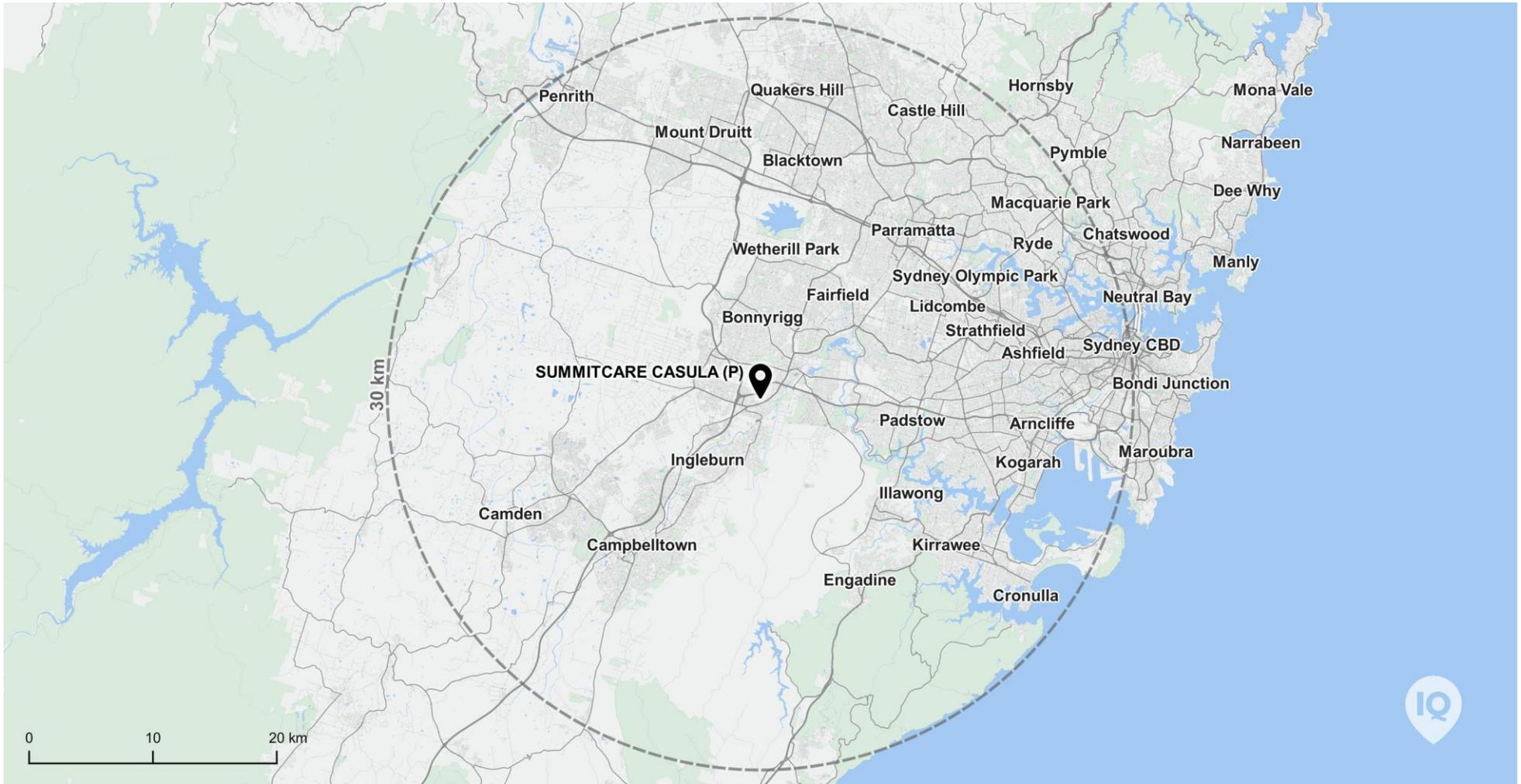
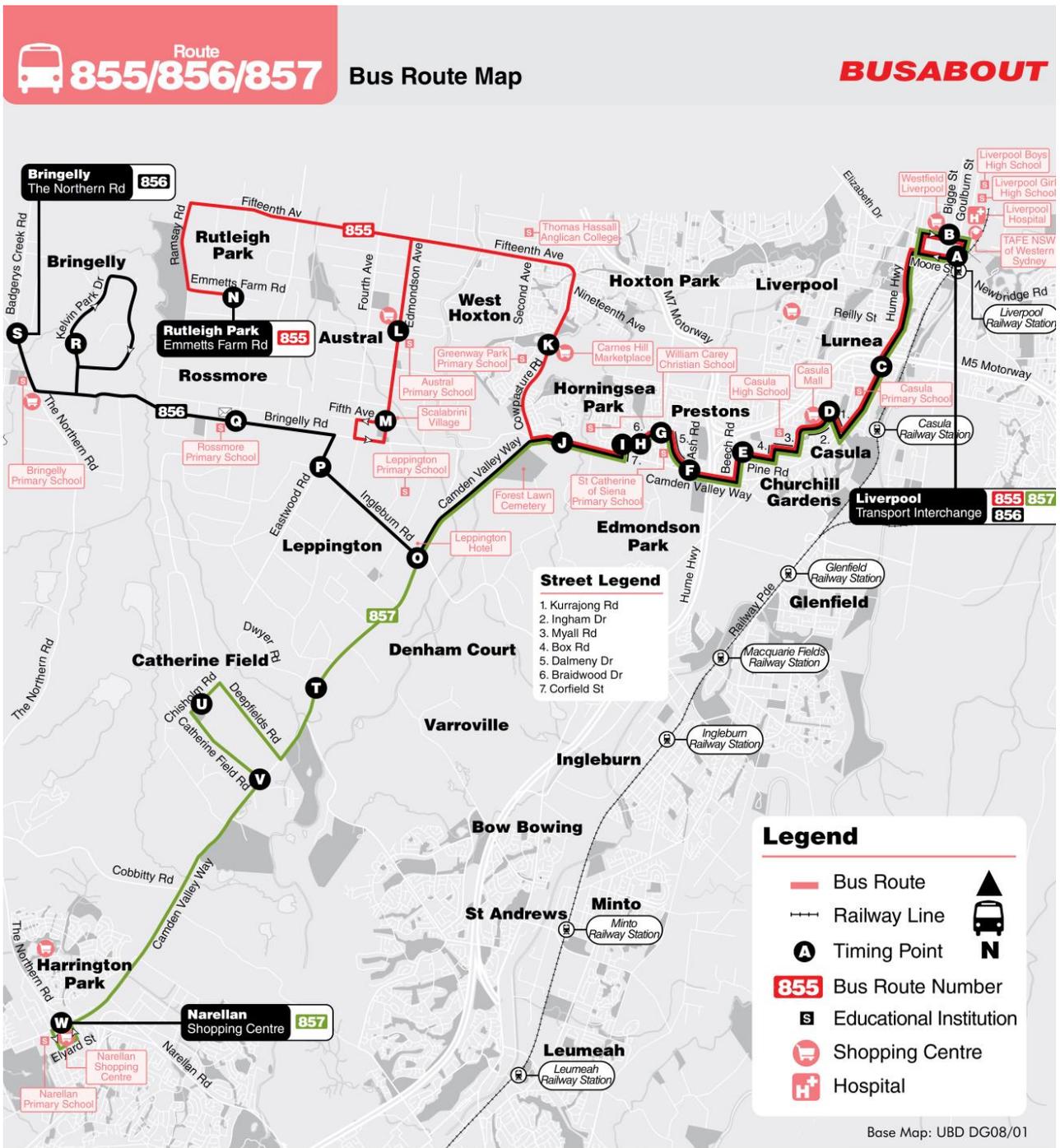
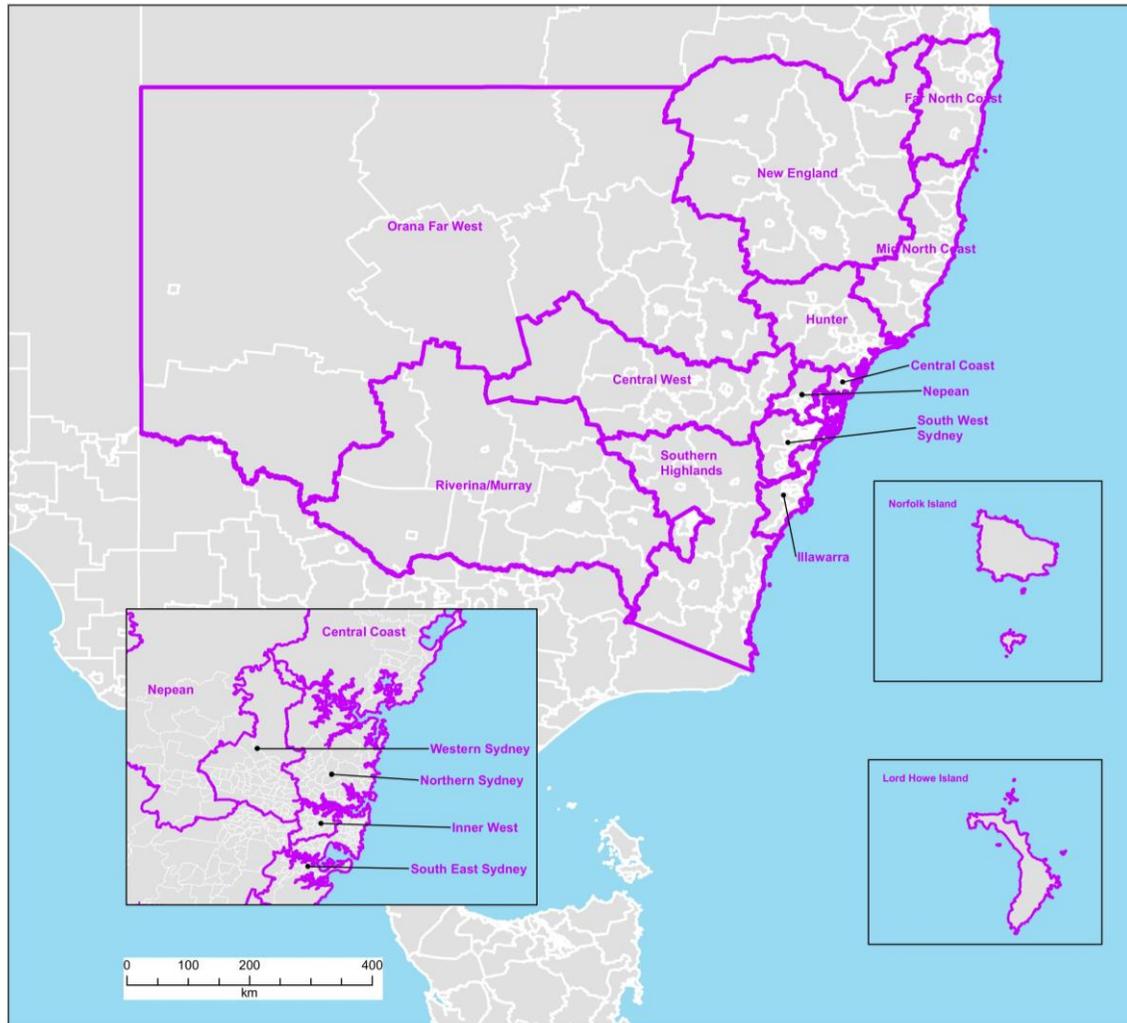


FIGURE 1.1. CASULA BUS SERVICES



MAP 1.2. METROPOLITAN NORTH PLANNING REGION (ACPR)



Australian Government

**Department of Health
Aged Care Planning
Regions 2018**

NEW SOUTH WALES

The Aged Care Planning Region boundaries displayed became effective in April 2018. They are based on Statistical Area Level 2 (SA2) boundaries from the Australian Bureau of Statistics Australian Statistical Geography Standard (ASGS) 2016.



Legend

- Aged Care Planning Region 2018
- Statistical Area Level 2 (SA2)

This map has been produced to be viewed as
A3 - Landscape.

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1.2. Local Context

- i. SummitCare propose the development of an aged care and independent living facility at Lot 1 DP 863214, 18 Randwick Close in Casula. The site falls to the south of Kurrajong Road and north of Ingham Drive.
- ii. Map 1.3 illustrates the local context of the site, with key points to note including:
 - The site is generally surrounded by residential dwellings and is provided adjacent to Daruk Park.
 - Casula Mall is located some 200 metres to east of the site and is a strong performing shopping centre, encompassing a total of 20,000 sq.m of retail and non-retail floorspace.
 - Dan Murphy's is situated on the eastern side of the Hume Highway, to the south of the Leacocks Lane intersection.
 - Casula High School is located on the western side of Ingham Drive at the intersection of Myall Road, south of the site.
 - Casula Public School is located on the southern side of De Meyrick Avenue to the north-east of Kurrajong Road site.
 - Casula Community Centre and Library is south of Durak Park, on the northern side of Ingham Drive.
 - Kurrajong Road provides direct access to the Hume Highway in the east via a traffic-lighted intersection and passes over the South Western Motorway. Kurrajong Road functions as a major sub-arterial road and provides primary access to major commercial, industrial and residential areas and distribution centres within Prestons and Carnes Hill. Kurrajong Road was extended between Kookaburra Road in Prestons and Sarah Holland Drive in Carnes Hill in late 2015. The extension provides a direct link between the Hume Highway in the east and Cowpasture Road in the west.
- iii. Overall, the subject site is situated in a high-profile location within an established residential area that is nearby to the popular Casula Mall that incorporates several services. The site is easily accessible to the surrounding population via the Hume Highway and also Kurrajong Road which provides access for residents to the west of the site in-and-around Carnes Hill.

MAP 1.3. CASULA LOCAL CONTEXT



- Site
- Shopping Centre
- Education
- Community



PhotoMap by nearmap.com



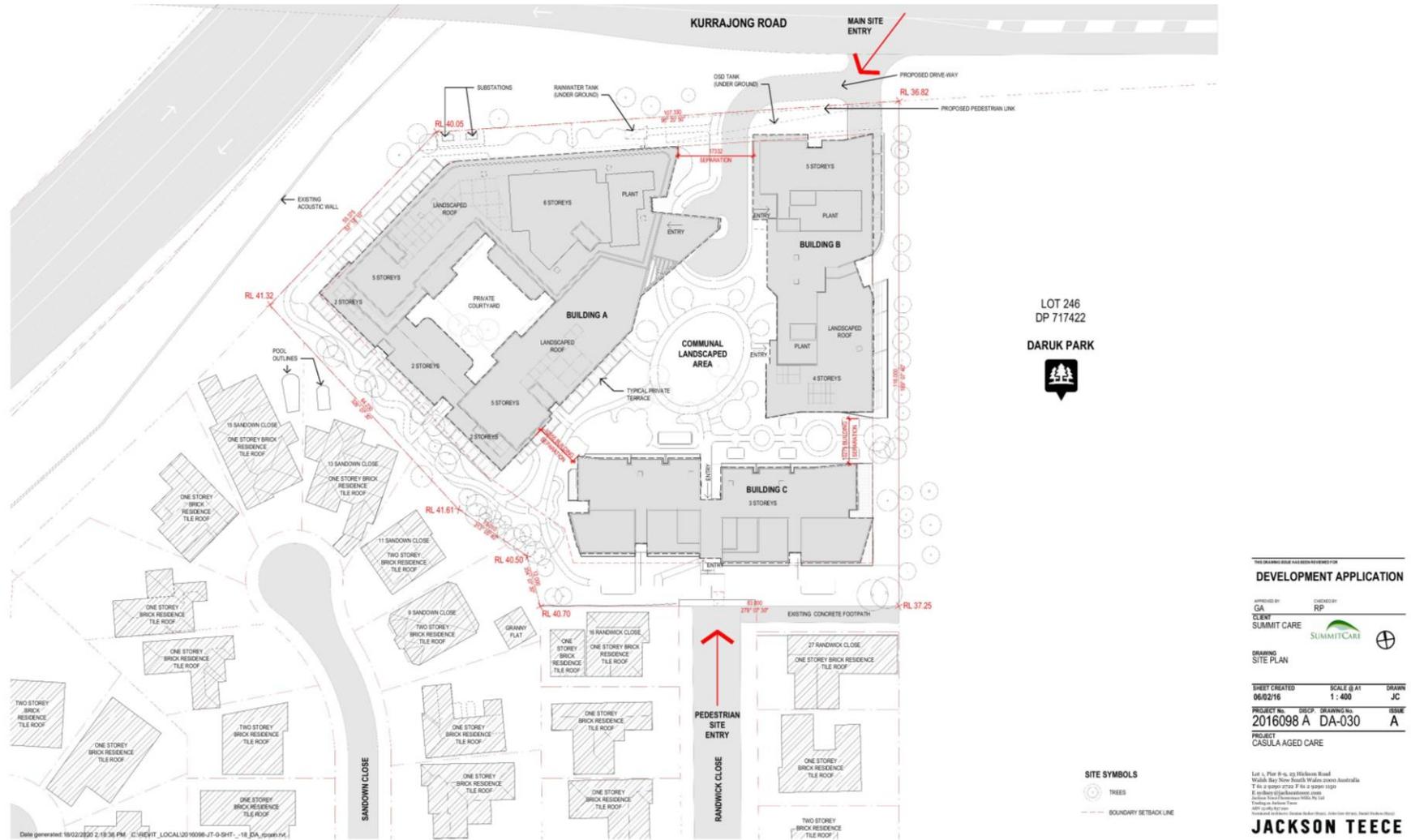
1.3. Existing Site and Proposed Development

- i. The subject site is located at 18 Randwick Close, Casula and is currently vacant - covered in vegetation. The site totals 13,194 sq.m in an irregular shape, with the longest boundaries being to the north along Kurrajong Road and to the east along Daruk Park.
- ii. The proposed development will provide high quality seniors accommodation with excellent amenity and services, with key components including:
 - **Residential Aged Care:** a 142 bed residential aged care facility situated in Building A, including shared communal facilities and dining areas for residents and necessary commercial and administrative areas.
 - **Retirement (Independent) Living:** a total of 93 independent living units will be provided across the three buildings. The site will also include a substantial range of community, entertainment and recreation facilities that will complement the overall offer
 - **Retail:** five small retail tenancies of 80 sq.m each at ground level (400 sq.m in total).
- iii. The proposed development will allow aging in place and maximise social interaction between residents, staff, visitors, and the wider community. The proposed components, integration and design of the subject development would be at the forefront of the aged care and retirement living sector.

FIGURE 1.2. PROPOSED DEVELOPMENT



FIGURE 1.3. SITE PLAN



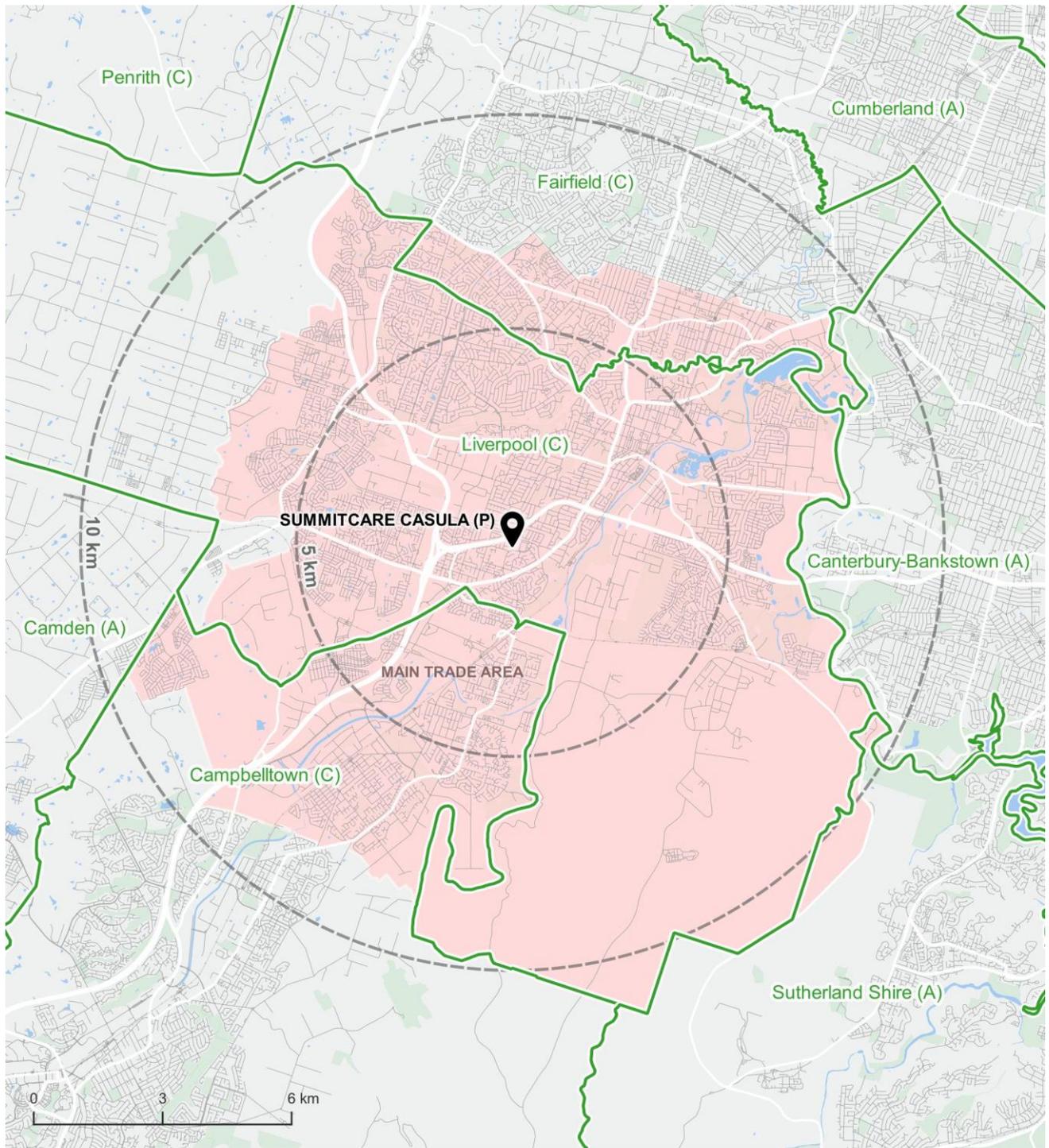
2 CATCHMENT AREA ANALYSIS

This section of the report provides a review of the catchment area likely to be served by aged care and independent living facilities at the Casula site. A summary of the current and projected population levels and the socio-economic profile of the catchment area population is also provided, as well as a more detailed review of the population aged 65 years and older.

2.1. Catchment Definition

- i. Based on discussion with SummitCare and a review of other aged care and independent living facilities in metropolitan areas, the defined catchment area for proposed facilities at Casula is illustrated in Map 2.1.
- ii. This catchment area reflects the core resident market from which proposed facilities at Casula are likely to draw from, accounting for a range of social, economic and cultural considerations.
- iii. The defined catchment area includes portions of the Liverpool, Fairfield, Campbelltown, and Sutherland Local Government Areas (LGAs). The area is generally limited by Elizabeth Drive and Cabramatta Road West to the north, Henry Lawson Drive to the east, Royal National Park to the south and Kemps Creek to the west.

MAP 2.1. CASULA CATCHMENT AREA



□ LGA



2.2. Catchment Area Population

- i. Table 2.1 details the current and projected population levels for the catchment area over the period to 2036, based on the following:
 - The 2011 and 2016 Census of Population and Housing undertaken by the Australian Bureau of Statistics.
 - New dwelling approvals statistics from the ABS from 2011/12 to 2018/19 (refer Chart 2.1). An average of 4,875 new dwellings were approved annually over this period.
 - Population projections prepared at the Small Area Forecast Information (SAFi) level by Forecast.id.
 - NSW Department of Planning forecasts prepared at an LGA level (2019).
 - Official projections from the Australian Institute of Health and Welfare (2019).
 - Investigations by this office into new residential developments in the area.

- ii. The Casula catchment area population is currently estimated at 334,860 (2020), having increased from 272,240 persons as at the 2011 Census. Future population growth throughout the catchment area is likely to be driven by several significant development areas in close proximity to the site, including:
 - The Edmondson Park precinct of the South West Growth Area is proposed to include up to 6,000 dwellings upon completion. Key residential sites within the growth precinct include Edmondson Park Town Centre (1,700 units/townhouses by 2026) and New Breeze Estate (1,280 lots by 2026).
 - Willowdale by Stockland has been under construction since 2014 and is planned to contain some 3,716 residential dwellings (more than 11,000 persons) upon completion. Some 1,200 – 1,400 dwellings are left to be completed.
 - The Liverpool City Centre Revitalisation Plan (approved in late 2015) aims to provide an additional 9,962 dwellings within and around the Liverpool City Centre, with approximately 242,000 sq.m of the City Centre to be rezoned or redeveloped. The Revitalisation Project is currently focused on a range of key projects, including the Macquarie Mall, Bigge Park, Georges River Precinct, City Nerve Centre and Eat Street projects along with associated public infrastructure improvements.

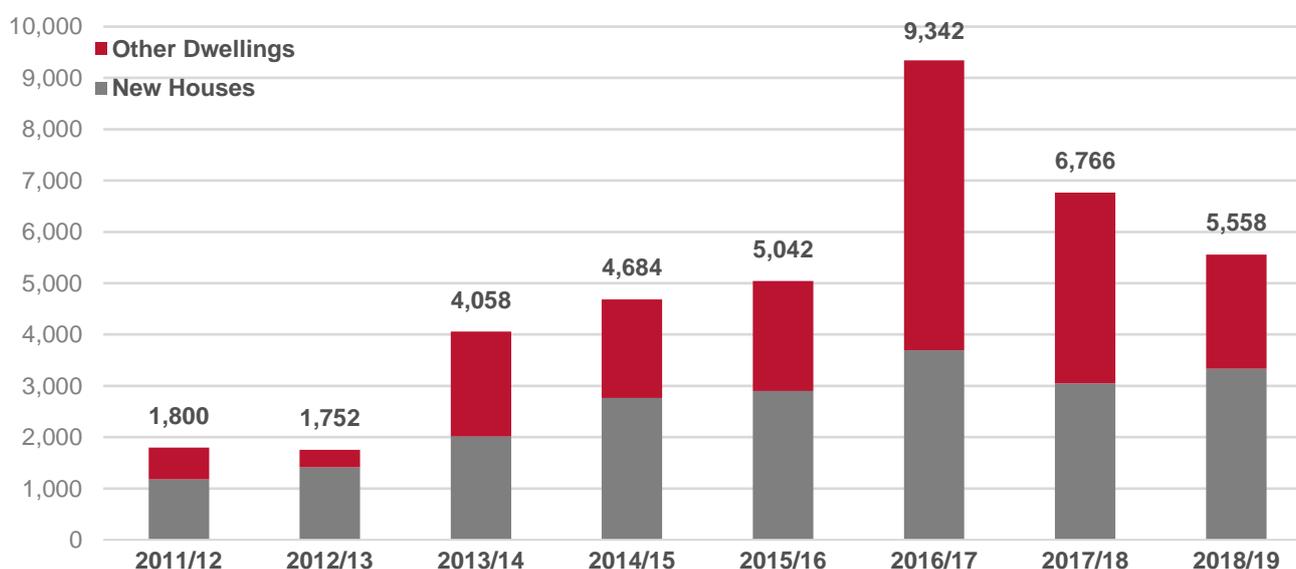
- iii. The catchment area population is projected to increase to 388,360 by 2036, representing an average annual growth rate of 0.9%, or some 3,344 persons. This projection is based on range of factors as outlined above and is generally in-line with various official projections.

TABLE 2.1. CATCHMENT AREA POPULATION, 2011 – 2036

Population	Actual				Forecast		
	2011	2016	2020	2021	2026	2031	2036
Main Trade Area	272,240	307,660	334,860	340,860	365,860	380,860	388,360
Average Annual Change (No.)	Actual			Forecast			
	2011-2016	2016-2020	2020-2021	2021-2026	2026-2031	2031-2036	
Main Trade Area		7,084	6,800	6,000	5,000	3,000	1,500
Average Annual Change (%)	Actual			Forecast			
	2011-2016	2016-2020	2020-2021	2021-2026	2026-2031	2031-2036	
Main Trade Area		2.5%	2.1%	1.8%	1.4%	0.8%	0.4%
Syd Metro		1.9%	1.5%	1.5%	1.3%	1.2%	1.0%
Australian Average		1.7%	1.4%	1.4%	1.4%	1.3%	1.2%

All figures as at June and based on 2016 SA1 boundary definition.
Sources : ABS; Planning NSW

CHART 2.1. CATCHMENT AREA NEW DWELLING APPROVALS, 2011/12 – 2018/19



Source: ABS



2.3. Socio-economic Profile

- i. Table 2.2 details the socio-economic profile of the Casula catchment area population as compared with the Sydney metropolitan and Australian benchmarks. This information is sourced from the 2016 Census of Population and Housing which is undertaken by the ABS.
- ii. Key points to note regarding the socio-economic profile of the Casula catchment area population include:
 - Average per capita and household income levels are significantly lower than the Sydney metropolitan and Australian benchmarks.
 - The average age of residents (35.1 years) is younger than the benchmarks.
 - The proportion of overseas born residents within the catchment area (46.7%) is significantly higher than the Sydney metropolitan benchmark (38.1%). Across Australia, around 1 in 3 persons in residential aged care was born overseas.
 - The household structure of catchment area residents generally comprises a high proportion of traditional families (couples with dependent children) as compared with the Sydney metropolitan benchmark.
- iii. Table 2.3 provides a summary of the change in the socio-economic profile of the catchment area population between the 2011 and 2016 Census compared with the Sydney metropolitan benchmark. Key points to note include:
 - Average household income levels increased at a faster rate than the benchmark.
 - The average age of residents increased slightly, in-line with benchmark levels.
 - The proportion of overseas-born residents within the catchment area increased slightly, at a slower rate than the benchmark.
 - The proportion of households consisting of couples with dependent children (i.e. traditional family households) increased slightly.

TABLE 2.2. CATCHMENT AREA SOCIO-ECONOMIC PROFILE, 2016 CENSUS

Characteristic	Catchment Area	Syd Metro Average	Aust Average
Income Levels			
Average Per Capita Income	\$29,538	\$42,036	\$38,500
Per Capita Income Variation	-29.7%		
Average Household Income	\$93,116	\$115,062	\$98,486
Household Income Variation	-19.1%		
Average Household Size	3.2	2.7	2.6
Age Distribution (% of Pop'n)			
Aged 0-14	22.0%	18.1%	18.0%
Aged 15-19	7.2%	6.0%	6.1%
Aged 20-29	14.3%	15.1%	13.9%
Aged 30-39	14.8%	15.7%	14.1%
Aged 40-49	13.8%	13.9%	13.7%
Aged 50-59	12.6%	12.3%	12.9%
Aged 60+	15.4%	19.0%	21.3%
Average Age	35.1	37.8	38.9
Housing Status (% of H'holds)			
Owner/Purchaser	65.3%	64.7%	67.9%
Renter	34.7%	35.3%	32.1%
Birthplace (% of Pop'n)			
Australian Born	53.3%	61.9%	72.9%
Overseas Born	46.7%	38.1%	27.1%
• Asia	20.6%	18.6%	10.7%
• Europe	6.1%	7.7%	8.0%
• Other	20.1%	11.8%	8.4%
Family Type (% of Pop'n)			
Couple with dep't children	52.8%	48.8%	45.2%
Couple with non-dep't child.	10.9%	9.2%	7.8%
Couple without children	13.5%	20.2%	23.0%
Single with dep't child.	11.3%	8.0%	8.9%
Single with non-dep't child.	5.1%	4.1%	3.7%
Other family	1.1%	1.2%	1.1%
Lone person	5.3%	8.5%	10.2%

Sources: ABS Census of Population and Housing 2016



TABLE 2.3. SOCIO-ECONOMIC PROFILE KEY CHANGES, 2011 – 2016

Characteristic	Casula MTA			Syd Metro		
	2011	2016	Change (%)	2011	2016	Change (%)
Income Levels						
Average Per Capita Income	\$25,947	\$29,538	13.8%	\$36,941	\$42,036	13.8%
Average Household Income	\$80,209	\$93,116	16.1%	\$99,586	\$115,062	15.5%
Age						
Average Age	34.5	35.1	1.8%	37.2	37.8	1.8%
Birthplace (% of Pop'n)						
Australian Born	54.4%	53.3%	-1.1%	63.7%	61.9%	-1.7%
Overseas Born	45.6%	46.7%	1.1%	36.3%	38.1%	1.7%
Household Size & Structure						
Average Household Size	3.1	3.2	2.0%	2.7	2.7	1.5%
Couple with dep't children	52.4%	52.8%	0.4%	48.2%	48.8%	0.6%
Housing Status (% of H'holds)						
Owner/Purchaser	67.7%	65.3%	-2.3%	67.4%	64.7%	-2.7%
Renter	32.3%	34.7%	2.3%	32.6%	35.3%	2.7%
Labour Force (% of Pop'n)						
Labour Force Participation	61.6%	60.4%	-1.2%	66.6%	65.6%	-1.0%
% Unemployed	4.8%	8.5%	3.7%	3.3%	6.0%	2.7%
% White Collar Occupations	60.8%	62.2%	1.4%	74.3%	74.7%	0.4%
% Blue Collar Occupations	39.2%	37.8%	-1.4%	25.7%	25.3%	-0.4%

Source: ABS Census of Population and Housing 2011 & 2016

2.4. Aged Residents Demographic

- i. The resident population aged 65 years and older is generally considered to be the most relevant age group for prospective aged care and independent living facilities.
- ii. Table 2.4 provides a timeseries snapshot of aged persons (65 years and older) throughout the Liverpool Local Government Area as at the 2006, 2011 and 2016 Census'. Key points to note are as follows:
 - A total of 13,564 persons were aged 65 years and older as at the 2006 Census, with this figure having grown by 57.2% to 21,326 persons in 2016. In particular, the proportion of residents aged 85 years or older almost doubled (+96.3%) over the same period.
 - The proportion of total residents that were aged 65 years and older also increased, from 8.2% in 2006 to 10.4% in 2016.
 - The majority of aged residents were married at each Census period, with this figure recorded at 57.8% in 2016.



- As has been the case throughout Australia, there has been a decrease in the proportion of aged residents with Christian affinity.
 - The proportion of aged persons requiring assistance for core need activities has increases from 23.3% in 2006, to 27.5% in 2016. Some 5,863 LGA residents aged 65 years and older required assistance as at the 2016 Census.
- iii. Map 2.2 highlights the location of residents aged 65 years and older throughout the catchment area and the broader region. As shown, there is generally no significant concentration of aged persons throughout the region, with older residents generally dispersed throughout surrounding residential suburbs.
- iv. Map 2.3 illustrates the location and density (by SA2) of residents aged 65 years and older that are recipients of the Age Pension. To be eligible for the Age Pension, persons must meet certain criteria, including key factors such as:
- Age: from 1 July 2017 age pension age was 65 years and 6 months, then increasing by six months every 2 years until 1 July 2023.
 - Residency: on the day you claim Age Pension you must be an Australian resident and be in Australia.
 - Income and Assets Test: the pension will reduce by 50 cents for every dollar of income over \$172 per fortnight (for singles) or \$304 per fortnight (for couples). Similarly, property or other owned items can affect pension payments.
- v. As shown, there is a high concentration of Age Pension recipients throughout the region, and indeed throughout South West Sydney more broadly.
- vi. In summary, there is a growing number of elderly residents aged 65 years and older throughout the Liverpool LGA and defined catchment area, who will likely require aged care services or consider independent living options now or in the future. Of particular note is the growth in residents aged 85 years or older, who are significantly more likely to require aged care facilities or demand retirement living choices. This reflects the general trend of an ageing population across Australia.

TABLE 2.4. TIME SERIES PROFILE OF RESIDENTS AGED 65+, 2006 – 2016

Metric	2006 Census		2011 Census		2016 Census	
	(no.)	(%)	(no.)	(%)	(no.)	(%)
Age Brackets						
65-69 years	4,471	33.0%	5,523	33.5%	7,361	34.5%
70-74 years	3,553	26.2%	4,227	25.6%	5,251	24.6%
75-79 years	2,678	19.7%	3,042	18.4%	3,881	18.2%
80-84 years	1,699	12.5%	2,144	13.0%	2,550	12.0%
85 years and over	<u>1,163</u>	<u>8.6%</u>	<u>1,559</u>	<u>9.5%</u>	<u>2,283</u>	<u>10.7%</u>
Total Persons Aged 65+	13,564	100%	16,495	100.0%	21,326	100.0%
Total Persons	164,601	8.2%	180,141	9.2%	204,326	10.4%
Marital Status of Residents Aged 65+						
Married	7,376	54.4%	9,325	56.5%	12,324	57.8%
Separated	429	3.2%	527	3.2%	790	3.7%
Divorced	1,023	7.5%	1,448	8.8%	2,126	10.0%
Widowed	4,288	31.6%	4,683	28.4%	5,363	25.1%
Never married	453	3.3%	500	3.0%	728	3.4%
Religious Affiliation of Residents Aged 65+						
Christianity	2,757	20.3%	3,060	18.6%	3,174	14.9%
• Churches of Christ	16	0.1%	26	0.2%	31	0.1%
Core Activity Need for Assistance for Residents Aged 65+						
Need for Assistance	3,154	23.3%	4,207	25.5%	5,863	27.5%
Does Not Have Need for Assistance	9,277	68.4%	10,936	66.3%	13,635	63.9%
Not Stated	1,133	8.4%	1,333	8.1%	1,825	8.6%

Higher than previous Census

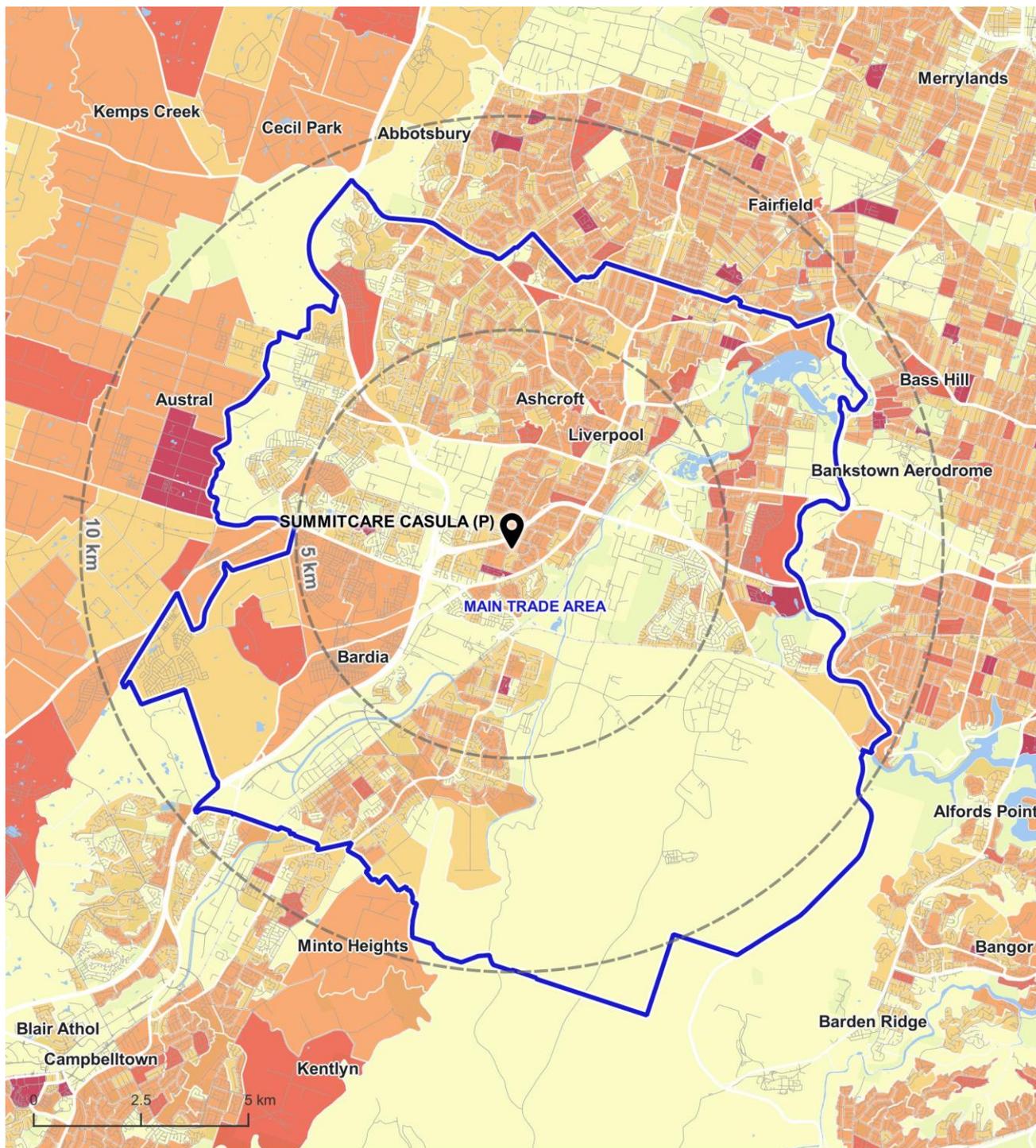
Lower than previous Census

Liverpool LGA

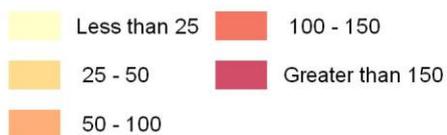
Source: ABS 2016 Census of Population and Housing - Time Series Profile (Catalogue number 2003.0)



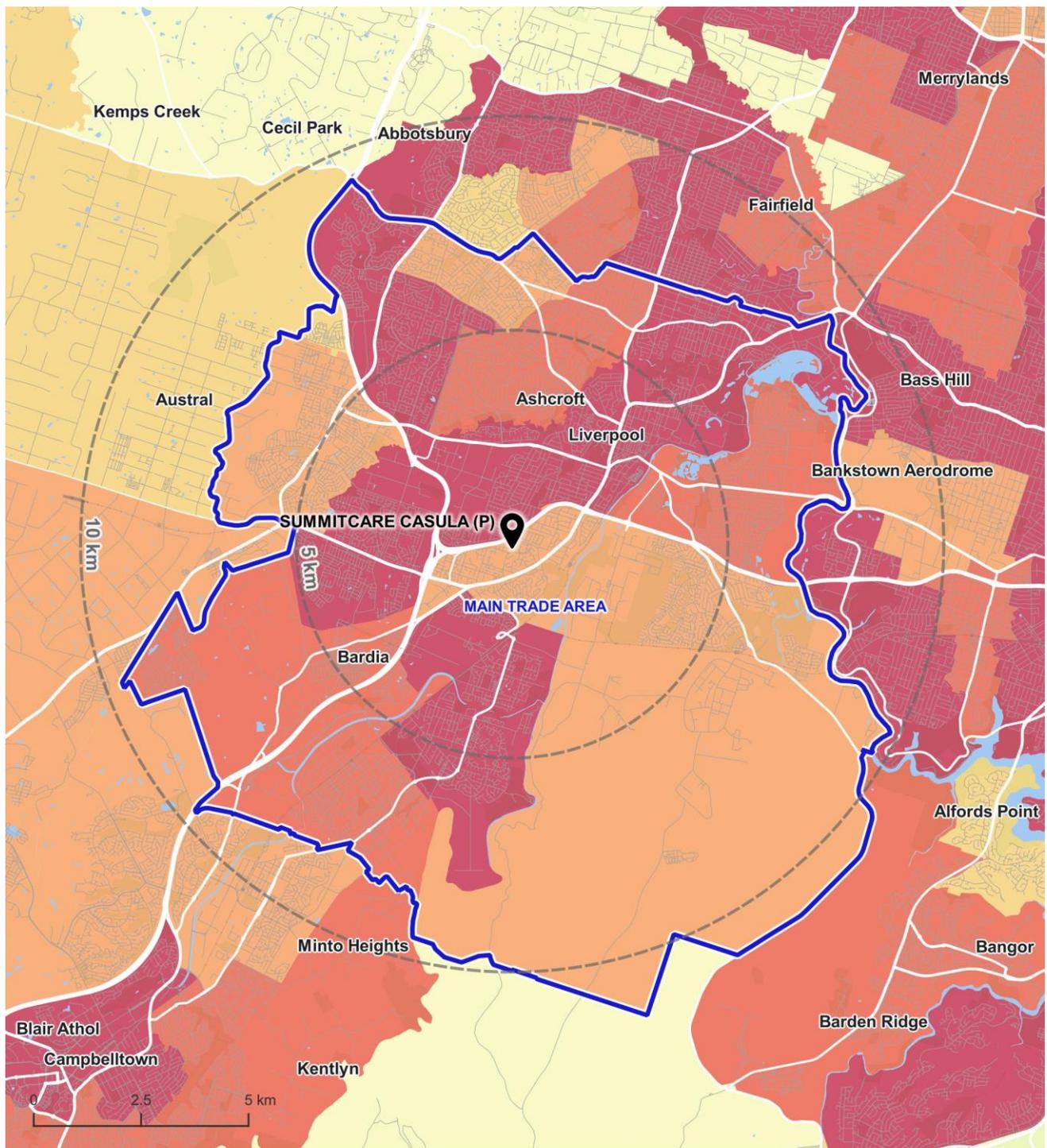
MAP 2.2. RESIDENTS AGED 65 YEARS AND OLDER



Total Number of Residents Aged 65+ by SA1



MAP 2.3. RESIDENTS AGED 65 YEARS AND OLDER RECEIVING AGE PENSION



3 AGED CARE POTENTIAL

This section of the report considers the potential for the proposed aged care component of the Casula development. Residential aged care is a service for older people that can no longer live at home without assistance due to illness, disability, bereavement, emergency or other needs.

3.1. National Aged Care Overview and Benchmarks

- i. The aged care sector in Australia generates annual revenue of \$22 billion, representing around 1% of Gross Domestic Product (GDP).
- ii. Federal Government funding for aged care services reached \$17.1 billion in 2016/17, of which \$11.9 billion was for residential care. Total government expenditure is expected to increase to \$22.2 billion by 2020/21.
- iii. The number of people entering aged care services has increased rapidly over the past decade. In 2007/08 some 164,000 people entered residential aged care, home care or transition care, while in 2017/18 this figure has increased to over 215,000 people (i.e. a 31.1% increase). Of this, some 207,142 people are in permanent residential aged care, across 2,695 facilities that are operated by more than 900 approved providers. Not-for-profit organisations make up some 58% of these providers.
- iv. The average number of places per aged care facility across Australia, at 80, which is lower than the South West Sydney region (107) benchmark. Private residential care places are more likely to be larger in size, while not-for-profit and government facilities tend to be smaller.
- v. Table 3.1 provides a comparison between the reported performance of three large, private aged care providers (Japara Healthcare, Regis and Estia Health), as well as regional, state and national benchmarks. Key points to note include:
 - Each of the major operators has at least 48 facilities, with a combined average of 96 places per location. Across Australia, more than half of the private-run placements formed part of 100+ bed facilities.

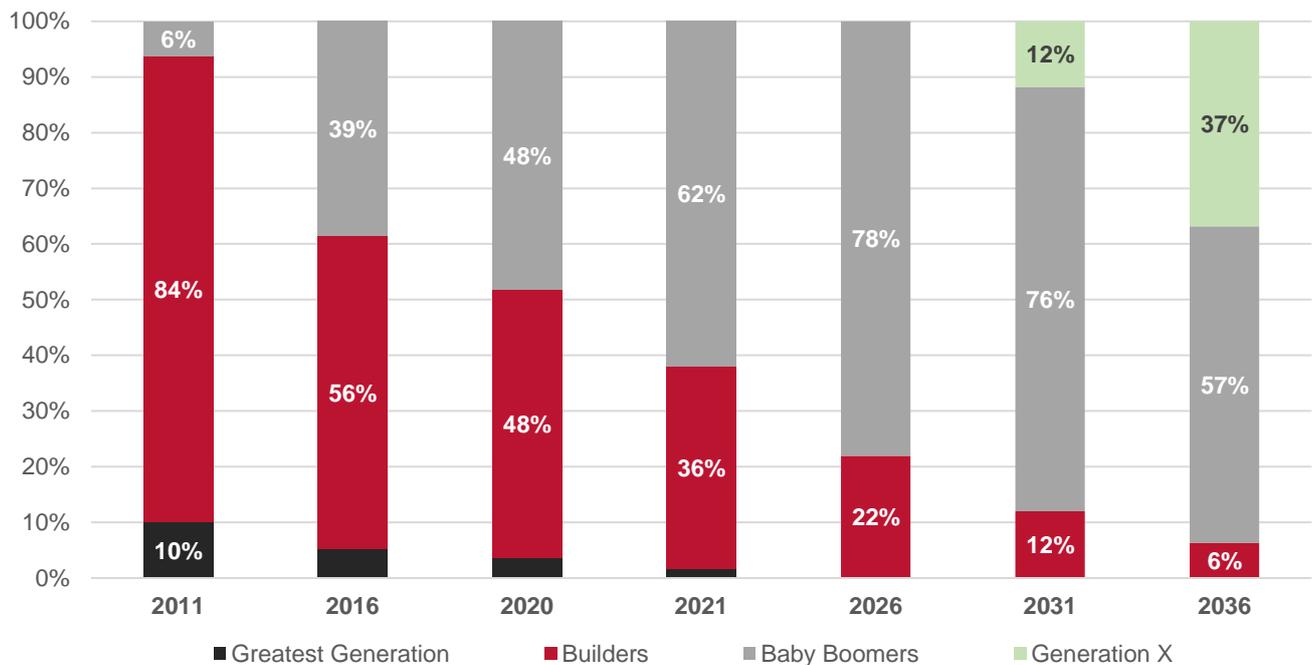
- The average occupancy across the three providers is currently around 93%, which is in-line with the South West Sydney (89.8%), New South Wales (89.2%) and Australian (89.4%) benchmarks.
 - Aged care accommodation pricing is not based on care requirements, but generally dependent on the overall quality/standard of a facility. Since key reforms were introduced in 2014, Daily Accommodation Payments (DAP) have become more common, as compared with Refundable Accommodation Deposits (RAD). Pre-reform, the ratio of RAD to DAP was around 90%, but has fallen to around 60%. The three major operators detailed in Table 3.1 each sit at or below this national benchmark (60%).
 - Based on the 2019 Aged Care Financial Performance Survey by StewartBrown, there was a slight increase in aged care pricing during 2018/19 across Australia, with the average Full Refundable Accommodation Deposit growing by \$15,790 over the period, to \$402,384. Across New South Wales, the average Full RAD increased from \$390,558 in 2017/18, to \$410,668 in 2018/19.
- vi. Perhaps the most significant trend across aged care facilities has been the focus on ageing in place. Since 2014, all permanent residential aged care has been provided on this basis, with residents having the right to indefinite accommodation, where the level of care and service adapts with their changing needs. This signalled a move away from previous high and low care distinctions.
- vii. Further, aged persons are beginning to experience a generational shift as aged persons transition from the 'builder' generation (1925-1946) to the 'baby boomer' generation (1945-1964). The 'builder' generation lived through the Great Depression and World War II, while 'baby boomers' experienced times of general economic prosperity.
- viii. The differences in life experiences is likely to shape the future preferences of aged residents as baby boomers typically have a higher median net worth than builders and thus, are more willing to use the extra money to achieve lifestyle aspirations. In this respect, baby boomers have greater expectations of quality of facilities and services.
- ix. Chart 3.1 provides an illustration of the projected generational shift across the Casula catchment area over time. As shown, the population of residents aged over 65 years is almost 50/50 between baby boomers and builders currently (2020), however, will be increasingly be made up of baby boomers over the medium to long term.

TABLE 3.1. AGED CARE BENCHMARKS SNAPSHOT

Metric	2019 Annual Reports			SW Sydney	2019 Benchmarks	
	Japara	Regis	Estia		NSW	Australia
Portfolio						
Facilities	49	63	69	66	246	2,718
Operating Places	4,235	7,078	6,102	7,049	18,345	217,067
Average Places per Home	86	112	88	107	75	80
Average Occupancy	93.0%	92.7%	93.6%	89.8%	89.2%	89.4%
Payment Type						
RAD payers	55.3%*	45.8%**	60.6%**	-	-	29.0%
DAP payers	27.0%	10.0%**	22.2%**	-	-	47.0%
Combination	17.6%	42.0%**	17.3%**	-	-	24.0%

* 2018 Figure, **2017 Figure; *** 2016 Figure
 Source: Annual Reports, Colliers Aged Care Financial Review, Stewart Brown

CHART 3.1. CATCHMENT AREA GENERATIONAL SHIFT (65+ YEARS)



3.2. Overview of Aged Care Facilities Within Catchment Area

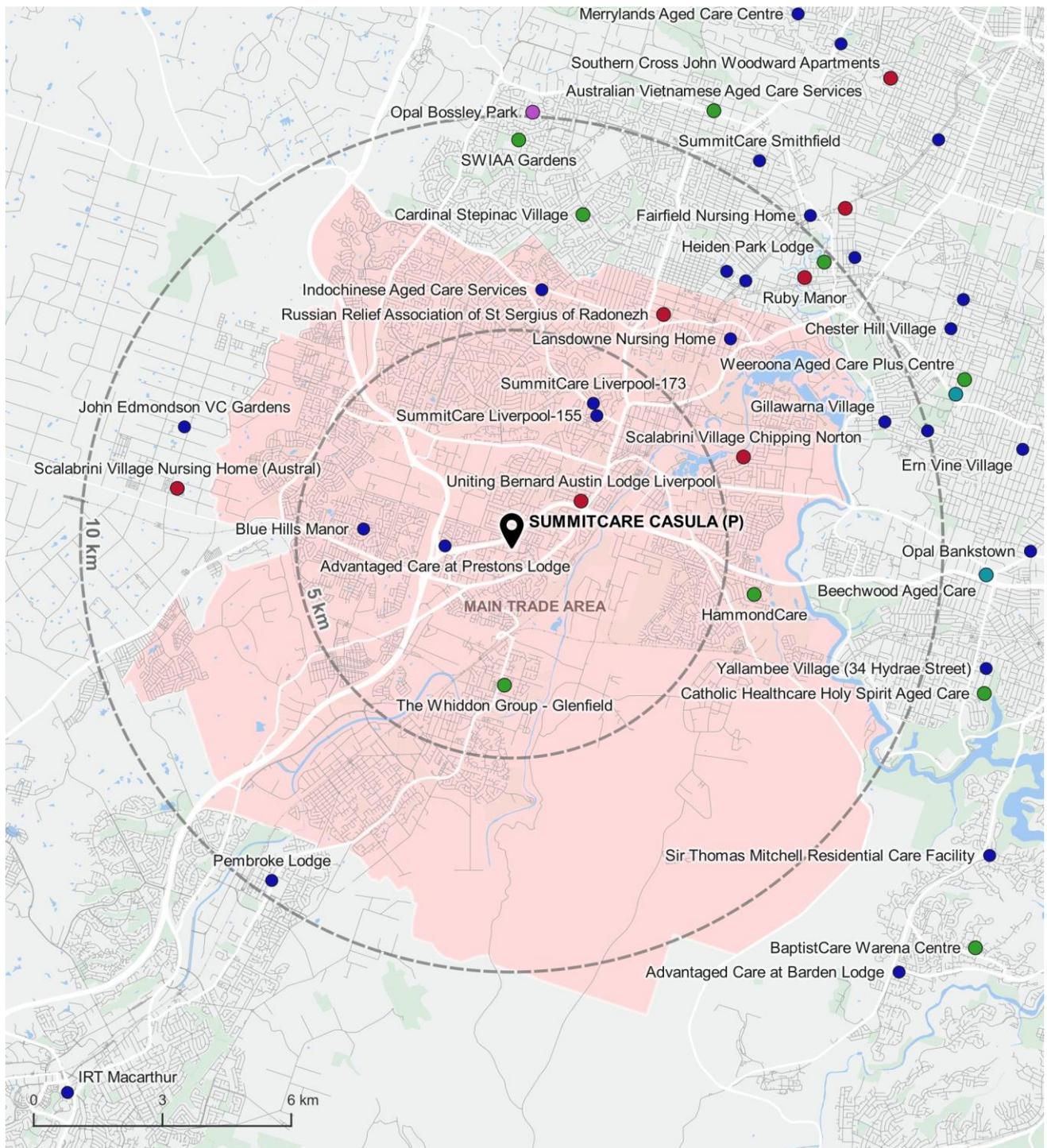
3.2.1. Existing Aged Care Facilities

- i. Map 3.1 and Table 3.2 provide a high-level overview of existing aged care facilities within the Casula catchment area. As shown, there are currently a total of 16 facilities, comprising a combined 1,833 places, or an average of 116 places per facility.
- ii. The Whiddon Group and HammondCare are the key operators within the region, each operating one large site, both of which comprise several smaller facilities.
- iii. Advantaged Care at Prestons Lodge is the closest aged care facility to the Casula site, located at 18 Melaleuca Place in Prestons, some 2 km away. There are no existing aged care facilities currently provided within the suburb of Casula. Other aged care facilities are each located more than 3 km from the Casula site.
- iv. Each of the 16 existing aged care facilities within the catchment area are located within 10 km of the proposed site. Catchment area facilities received total federal funding of a combined \$122.5 million in 2018/19, or an average of \$66,256 per bed.

3.2.2. Future Aged Care Developments

- i. As detailed in Table 3.3 and highlighted again on Map 3.1, there are currently only three other planned aged care facilities across the catchment area, as follows:
 - Holy Spirit Casula is under construction 2 km north-east of the subject site at 11-15 Lang Road in Casula. The facility is planned to comprise a total of 144 aged care beds upon completion by 2021.
 - Uniting has development approval for a 120-bed facility at 133 Bigge Street in Liverpool, which is assumed to be operational by 2023.
 - Bolton Clarke Willowdale is an approved 144-bed facility at Denham Court, which is assumed to open from 2022.
- ii. In addition, the subject site (SummitCare Casula) is proposed to comprise an additional 142 beds.
- iii. For the purposes of this assessment (and as highlighted in Table 3.3), each of the above facilities is assumed to open over the forecast period, and specifically by 2026. This would represent a net addition of 408 aged care beds (or 551 beds including the subject development) to the catchment area over the 2020 – 2026 period.

MAP 3.1. EXISTING AGED CARE FACILITIES



- Religious Aged Care
- Charitable Aged Care
- Opal Aged Care
- Allity
- Independent Aged Care



TABLE 3.2. EXISTING AGED CARE FACILITIES, SOUTH WEST SYDNEY REGION

Service Name	Address	Suburb	Residential Places	Provider Name	Organisation Type	2018/19 Aust. Gov Funding	Dist. from Site (km)
Within Catchment Area							
Advantaged Care at Prestons Lodge	18 Melaleuca Place	Prestons	132	Advantaged Care 2 Pty Limited	Private Incorporated Body	\$6,461,867	2.0
Uniting Bernard Austin Lodge Liverpool	14 Boundary Road	Liverpool	41	The Uniting Church in Australia Property Trust (NSW)	Religious	\$3,191,834	3.3
Blue Hills Manor	25 Tulich Avenue	Prestons	67	Blue Hills Village Management (Liverpool) Pty Limited	Private Incorporated Body	\$3,930,377	4.8
The Whiddon Group - Glenfield - Arthur Webb	81 Belmont Road	Glenfield	48	The Frank Whiddon Masonic Homes of NSW	Charitable	\$3,501,557	4.8
The Whiddon Group - Glenfield - Easton Park	81 Belmont Road	Glenfield	197	The Frank Whiddon Masonic Homes of NSW	Charitable	\$12,643,971	4.8
The Whiddon Group - Glenfield	81 Belmont Road	Glenfield	356	The Frank Whiddon Masonic Homes of NSW	Charitable	\$23,620,931	4.8
SummitCare Liverpool-155	155 Elizabeth Drive	Liverpool	52	Wohl Investments Pty Ltd	Private Incorporated Body	\$2,915,701	5.8
SummitCare Liverpool-173	173 Elizabeth Drive	Liverpool	100	Wohl Investments Pty Ltd	Private Incorporated Body	\$7,223,710	5.9
Scalabrini Village Chipping Norton	199 Epsom Road	Chipping Norton	152	Scalabrini Village Ltd	Religious	\$10,496,983	7.8
Indochinese Aged Care Services	680 Cabramatta Road	Bonnyrigg	88	Indochinese Aged Care Limited	Community Based	\$7,190,274	8.3
Russian Relief Association of St Sergius of Radonezh	1 Gilbert Street	Cabramatta	168	Russian Relief Association of St Sergius of Radonezh	Religious	\$13,119,026	8.6
Lansdowne Nursing Home	25 Lovoni Street	Cabramatta	161	Arete Health Care (Lansdowne) Pty Limited	Private Incorporated Body	\$9,117,633	8.9
HammondCare - Bond House	11-23 Judd Avenue	Hammondville	124	HammondCare	Charitable	\$7,333,198	9.7
HammondCare - The Meadows	11-23 Judd Avenue	Hammondville	40	HammondCare	Charitable	\$2,544,069	9.7
HammondCare - The Pines	11-23 Judd Avenue	Hammondville	40	HammondCare	Charitable	\$2,593,494	9.7
HammondCare - Southwood	11-23 Judd Avenue	Hammondville	83	HammondCare	Charitable	\$6,622,115	9.7

Source: Australian Institute of Health and Welfare - Aged Care Service List (Jun-19)

TABLE 3.3. PROPOSED AGED CARE FACILITIES

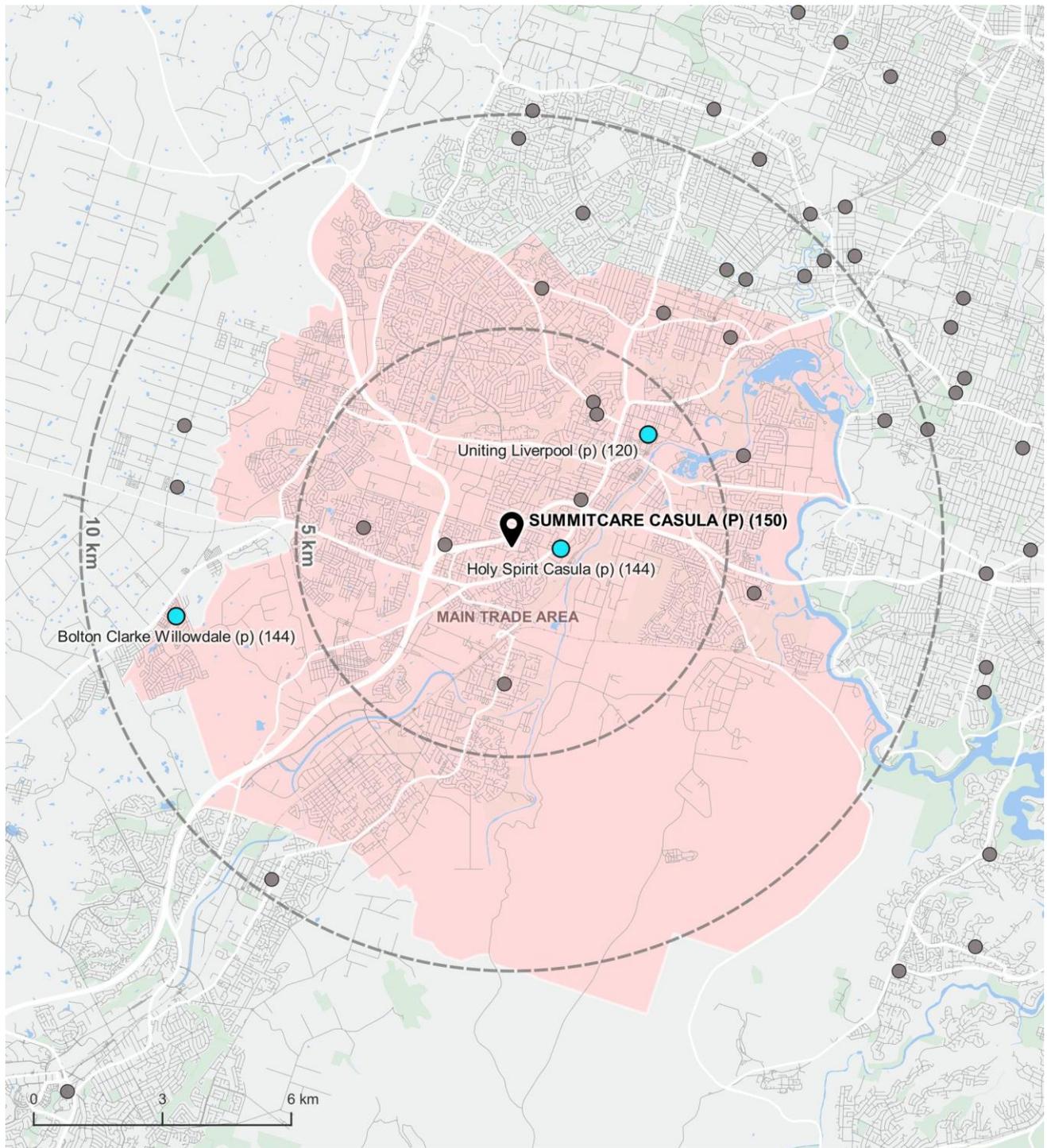
Service Name	Address	Suburb	Provider	Existing/ Proposed Facility	Component/Details	Status/Stage	Additional Places (Net)	Estimated Completion	Dist. from Site (km)
Within Catchment Area									
Holy Spirit Casula	11-15 Lang Rd	Casula	Catholic Healthcare	Proposed	Construction of a 3-storey, 144-bed residential aged care facility.	Under Construction	144	2021	2.0
Uniting Liverpool	133 Bigge St	Liverpool	The Uniting Church of Austr	Proposed	20-storey multi-purpose aged care independent living centre	DA Approved	120	2023	5.4
Bolton Clarke Willowdale	247 Jamboree Ave	Denham Court	Bolton Clarke	Proposed	Construction of a 2-storey aged care facility to comprise 144 beds	DA Approved	144	2022	10.0

Source: Cordell, Location IQ Database, Australian Institute of Health and Welfare - Aged Care Service List (Jun-19)

Assumed | Not assumed



MAP 3.2. PROPOSED AGED CARE FACILITIES (NET ADDITIONAL BEDS)



- Net additional beds
- No change



3.2.3. Range of Services

- i. All facilities within the defined catchment area offer permanent residential aged care, with a range of care options and accommodation provided. The provision of care ranges from assistance with daily activities to 24 hour nursing care.
- ii. As outlined previously, since 2014, all permanent residential aged care has been provided on this basis, with residents having the right to indefinite accommodation, where the level of care and service adapts with their changing needs.
- iii. As shown in Table 3.4, six of the reporting sites offer terminal illness care, while almost all cater for residents with dementia. Based on recent data from the Australian Institute of Health and Welfare (AIHW), some 53.2% of people using permanent residential aged care across the South West Sydney ACPR had a diagnosis of dementia.

TABLE 3.4. SERVICES MEETING PARTICULAR NEEDS, CATCHMENT AREA

Service Name	Terminal Illness	Indigenous Persons	LGBTI	Veterans	Dementia	Social/ Financial	Food Req.	Cultural/ Linguistic
Within Catchment Area								
Advantaged Care at Prestons Lodge					•	•		
Uniting Bernard Austin Lodge Liverpool			•		•	•		
Blue Hills Manor					•	•		
The Whiddon Group - Glenfield	•	•		•	•	•	•	•
SummitCare Liverpool-155	•				•	•		
SummitCare Liverpool-173	•				•			
Scalabrini Village Chipping Norton	•				•	•		•
Indochinese Aged Care Services								
Russian Relief Association of St Sergius of Radonezh	•				•	•	•	•
Lansdowne Nursing Home					•	•		
HammondCare	•				•	•		

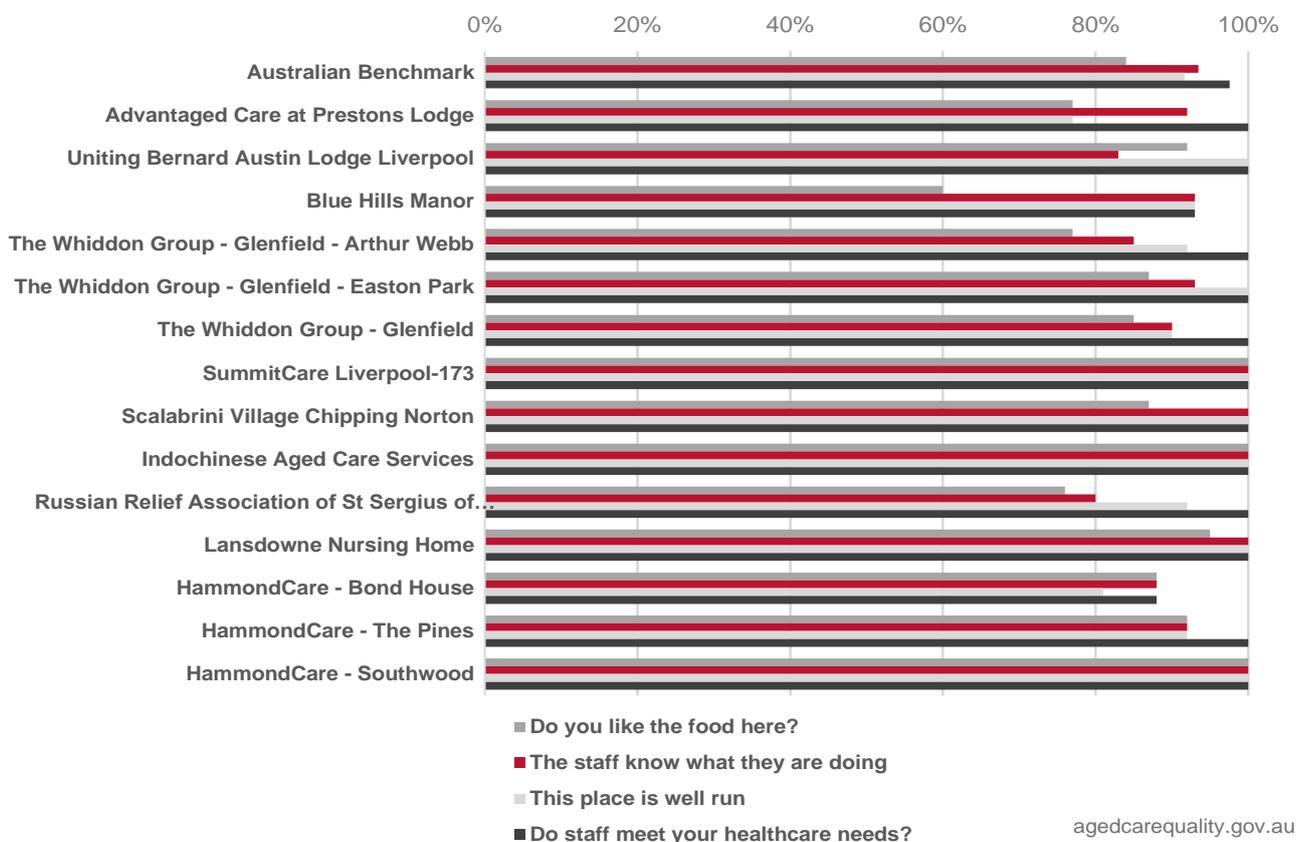
"-" = information not available

Source: Australian Institute of Health and Welfare - Aged Care Service List (Jun-18)

3.2.4. Aged Care Quality and Survey Results

- i. It is difficult to compare the quality of various aged care facilities given all approved/accredited facilities are required to meet standards in areas such as health, safety, personal care and staffing. Each of the catchment area facilities met all 44 of the requisite standards.
- ii. When a team of assessors from the Aged Care Quality and Safety Commission visit a residential aged care service to perform re-accreditation as part of an audit, they interview at least 10% of those living in the home. A core set of consumer interview questions are used to collect data on the experiences of the quality of care and services from those living in the home. The findings are reported in a Consumer Experience Report (CER).
- iii. Some key results from these audits are illustrated in Chart 3.2, which indicate that most facilities recorded responses that were at or above the national benchmark. Only three providers recorded 100% positive (most of the time or always) response rates to the four key questions, namely SummitCare (the operator of the subject development), Indochinese Aged Care and HammondCare.
- iv. This would generally indicate that the subject development (SummitCare) would provide a similarly high level of care and resident amenity.

CHART 3.2. CONSUMER EXPERIENCE REPORT - MOST OF THE TIME OR ALWAYS (%)



3.2.5. Composition and Pricing

- i. Table 3.5 provides a summary of the average composition and pricing of aged care facilities throughout the broader region, based on data from the AIHW (June 2018). Tables 3.6 & 3.7 provide a detailed breakdown of this information by facility and room.
- ii. A total of 583 rooms were reported to the survey, the vast majority of which were single bedrooms (92.5%). The average size of single rooms is 20.6 sq.m, while shared bedrooms average 33.6 sq.m in size and typically host two occupants.
- iii. In terms of pricing, the average RAD cost across the region was \$464,606 for single rooms and \$326,000 for shared rooms. This can be compared with the New South Wales average of \$410,668 and National benchmark of \$402,384. RADs vary significantly across the region, ranging from \$300,000 - \$700,000.
- iv. The average DAP across the catchment area is currently \$62.5 for single rooms and \$43.85 for shared rooms, but again is subject to significant variation between facilities. It is commonplace for residents to partially-pay the RAD in order to reduce the requisite DAP, in what is known as a combination payment.

TABLE 3.5. AGED CARE FACILITY AVERAGES (CATCHMENT AREA)

Service Name	Single Room	Shared Room
Broader Region		
Proportion of Total Rooms (%)	92.5%	7.5%
Bathroom		
• Ensuite (%)	83.2%	1.9%
• Shared (%)	16.8%	98.1%
Average Room Size (sq.m)	20.6	33.6
Average Occupancy (no. of persons)	1.0	2.9
Average RAD (\$)	\$464,606	\$326,000
Average DAP (\$)	\$62.50	\$43.85

Source: Australian Institute of Health and Welfare - Aged Care Homes Composition (Jun-18)



TABLE 3.6. CATCHMENT AREA REPORTED ROOM COMPOSITION AND PRICING (1/2)

Service Name/Room	Room		Bathroom		Total (rooms)	Max. Occ. (pers)	Room Size (sq.m)	RAD (\$)	DAP (\$/day)	Ex Serv. Fee (\$)
	Single	Shared	Ens.	Shared						
Advantaged Care at Prestons Lodge										
Classic Shared		●		●	16	2	40	\$305,000	\$41.03	\$0
Classic Plus		●		●	16	2	17	\$385,000	\$51.79	\$0
Premium	●			●	20	1	15	\$435,000	\$58.52	\$15
Classic	●			●	16	1	15	\$355,000	\$47.75	\$0
Superior	●		●		30	1	25	\$550,000	\$73.99	\$23
Deluxe	●		●		18	1	25	\$525,000	\$70.62	\$23
Classic	●			●	32	1	15	\$395,000	\$53.14	\$0
Classic Shared		●		●	16	2	40	\$375,000	\$50.45	\$0
Superior	●		●		30	1	25	\$625,000	\$84.08	\$23
Deluxe	●		●		18	1	25	\$575,000	\$77.35	\$23
Premium	●			●	20	1	18	\$445,000	\$59.86	\$15
Blue Hills Manor										
Presidential Suite	●		●		4	1	38.1	\$400,000	\$53.81	\$0
Medium Room	●		●		1	1	34.35	\$350,000	\$47.08	\$0
Small room	●		●		62	1	25.6	\$300,000	\$40.36	\$0
Executive Suite	●		●		2	1	34.35	\$450,000	\$60.53	\$0
Presidential Suite	●		●		3	1	38.1	\$525,000	\$70.62	\$0
Studio Suite	●		●		62	1	25.6	\$400,000	\$53.81	\$0
The Whiddon Group - Glenfield										
Arthur Webb Court - Single Room	●		●		48	1	16	\$375,000	\$50.45	\$0
Sir David Martin - Leslie Lock - Single C	●		●		20	1	24	\$610,000	\$82.06	\$0
Sir David Martin - Leslie Lock - Single D	●		●		20	1	24	\$550,000	\$73.99	\$0
Sir David Martin - Leslie Lock - Single A	●		●		15	1	24	\$650,000	\$87.44	\$0
Taylor House - Christie - Dementia Single	●			●	15	1	17.5	\$399,000	\$53.67	\$0
Taylor House - Straughen Single - A	●		●		12	1	20	\$399,000	\$53.67	\$0
Sir David Martin - Treloar - Single Room	●		●		15	1	24	\$499,000	\$67.13	\$0
Sir David Martin - Heathwood Dementia Wing - Single	●		●		20	1	24	\$550,000	\$73.99	\$0
Sir David Martin - Leslie Lock - Single B	●		●		15	1	24	\$620,000	\$83.40	\$0
Raines House - Companion	●			●	45	3	42	\$340,000	\$45.74	\$0
Taylor House - Straughen Single - C	●		●		20	1	20	\$495,000	\$66.59	\$0
Taylor House - Straughen Single - B	●		●		12	1	24	\$499,000	\$67.13	\$0
Raines House - Single	●			●	2	1	16	\$360,000	\$48.43	\$0
Taylor House - Christie Single	●			●	20	1	17.5	\$399,000	\$53.67	\$0
Easton Park Units - Dementia - Single B	●		●		15	1	16	\$375,000	\$50.45	\$0
Easton Park Units - Single	●		●		100	1	16	\$350,000	\$47.08	\$0
Easton Park Units - Single (Refurbished)	●		●		40	1	16	\$400,000	\$53.81	\$0
Easton Park Units - Twin	●		●		4	2	20	\$330,000	\$44.39	\$0
Taylor House - Coates Single - Dementia	●		●		12	1	16	\$375,000	\$50.45	\$0
Easton Park Units - Dementia Wing - Single A	●		●		10	1	16	\$350,000	\$47.08	\$0

Source: Australian Institute of Health and Welfare - Aged Care Homes Composition (Dec-19)



TABLE 3.6. CATCHMENT AREA REPORTED ROOM COMPOSITION AND PRICING (2/2)

Service Name/Room	Room		Bathroom		Total (rooms)	Max. Occ. (pers)	Room Size (sq.m)	RAD (\$)	DAP (\$/day)	Ex Serv. Fee (\$)
	Single	Shared	Ens.	Shared						
SummitCare Liverpool-155										
Single Room	•			•	1	1	8 to 10	\$425,000	\$56.93	\$0
Twin Room		•		•	1	2	13 to 23	\$375,000	\$50.23	\$0
Shared Room		•		•	1	4	28 to 38	\$325,000	\$43.54	\$0
SummitCare Liverpool-173										
Single Room	•			•	1	1	8 to 10	\$425,000	\$56.93	\$0
Twin Room		•		•	1	2	13 to 23	\$375,000	\$50.23	\$0
Shared Room		•		•	1	4	28 to 38	\$325,000	\$43.54	\$0
Scalabrini Village Chipping Norton										
Building D	•			•	72	1	24	\$695,000	\$93.49	\$0
Bellini	•			•	42	1	23	\$695,000	\$93.49	\$0
Indochinese Aged Care Services										
Banksia	•			•	88	1	21	\$350,000	\$47.08	\$0
Russian Relief Association of St Sergius of Radonezh										
3 Bed with Ensuite		•		•	1	3	38	\$330,000	\$44.39	\$0
Double		•		•	1	2	20	\$340,000	\$45.74	\$0
Double with Ensuite		•		•	1	2	28	\$360,000	\$48.43	\$0
Single	•			•	1	1	9	\$380,000	\$51.12	\$0
Single with Ensuite	•			•	1	1	23	\$400,000	\$53.81	\$0
4 Bed Room		•		•	1	4	35	\$290,000	\$39.01	\$0
3 Bed Room		•		•	1	3	29.8	\$310,000	\$41.70	\$0
Lansdowne Nursing Home										
Shared Room		•		•	40	4	40	\$295,000	\$39.68	\$0
HammondCare - Bond House										
The Pines	•			•	40	1	15	\$550,000	\$73.99	\$0
Harding	•			•	50	1	22 to 24	\$625,000	\$84.08	\$0
Lavender Suite	•			•	9	1	20	\$330,000	\$44.39	\$0
Jones Hostel	•			•	52	1	16	\$395,000	\$53.14	\$0
Shaw & Poate Homes - single	•			•	46	1	12 to 16	\$340,000	\$45.74	\$0
Shaw & Poate Homes - shared		•		•	8	3	16	\$295,000	\$39.68	\$0
Southwood	•			•	83	1	16	\$550,000	\$73.99	\$0
Single Room	•			•	40	1	15	\$550,000	\$73.99	\$0

Source: Australian Institute of Health and Welfare - Aged Care Homes Composition (Dec-19)



3.2.6. Indicative Vacancy Rates

- i. It is important to note that information in the previous Table 3.6 is based on self-reported data from the AIHW's Aged Care Homes Composition survey. Similarly, Table 3.7 also highlights AIHW data on the number of unallocated permanent residential aged care places across the state Aged Care Planning Regions.
- ii. As shown, the South West Sydney region of New South Wales has a lower level of unused places (2.4%), as compared with the State (3.9%) and National (3.0%) benchmarks. This level of vacancy (2.4%) is considered to be the natural vacancy rate (turnover) for the catchment area.
- iii. Discussions with local operators within the catchment confirm this general low level of vacancy, with many having waiting lists for aged care services across varying needs.

TABLE 3.7. RESIDENTIAL AGED CARE VACANCY BENCHMARKS, JUNE 2019

State/Aged Care Planning Region	Allocated Residential Care Places	Unused Residential Care Places	% Unused (Vacancy Rate)
New South Wales			
New England	2,121	0	0.0%
Orana Far West	1,863	0	0.0%
Riverina/Murray	3,589	26	0.7%
Central West	2,374	32	1.3%
Illawarra	5,295	91	1.7%
Southern Highlands	2,775	46	1.7%
Mid North Coast	5,345	101	1.9%
Nepean	3,179	67	2.1%
Western Sydney	8,015	178	2.2%
Hunter	7,875	180	2.3%
<i>South West Sydney</i>	9,317	228	2.4%
Inner West	5,177	145	2.8%
Central Coast	5,050	195	3.9%
South East Sydney	9,563	445	4.7%
Far North Coast	4,460	253	5.7%
Northern Sydney	10,625	1,361	12.8%
New South Wales Total	86,623	3,348	3.9%
Australia Total	262,680	8,655	3.3%

Source: Australian Institute of Health and Welfare -Stocktake of Aged Care Places (Jun-19)

3.3. Residential Market

- i. At-home aged care solutions are generally more affordable than permanent residential aged care, which can encourage prospective residents to retain ownership of their properties for longer and have care services come to them. In addition, where property prices are increasing by more than RADs, residents can be incentivised to delay aged care transition.
- ii. Charts 3.1 and 3.2 illustrate median house prices and sales volumes, respectively, across the suburb of Casula, as well as the Liverpool LGA. As shown, median house prices have stabilised in recent years, having increased markedly since around 2012 to \$765,000 in Casula and \$748,000 across the broader Liverpool LGA.
- iii. Charts 3.3 and 3.4 illustrate median unit prices and sales volumes across the same localities, also reflecting a similar trend. Currently, median unit prices are around \$600,000 across Casula and \$395,000 within the Liverpool LGA.
- iv. Generally, both Casula and the Liverpool LGA are characterised by strong median dwelling prices that are slightly below the Sydney metropolitan median of \$1 million for houses and \$700,000 for units.
- v. Residents often choose between selling or drawing down against their housing equity to meet aged care costs (as recommended by the Productivity Commission's aged care equity release scheme).
- vi. Based on the Aged Care Financial Performance Survey (June 2019) by StewartBrown, the median RAD across Sydney represented 49.8% of the median house price in 2019.
- vii. In comparison, the average RAD for single beds across the catchment area (\$460,197) represents 60% of the Casula median house price (and 77% of the median unit price), while the average shared bed RAD (\$318,814) represents 42%.

CHART 3.3. MEDIAN HOUSE PRICES

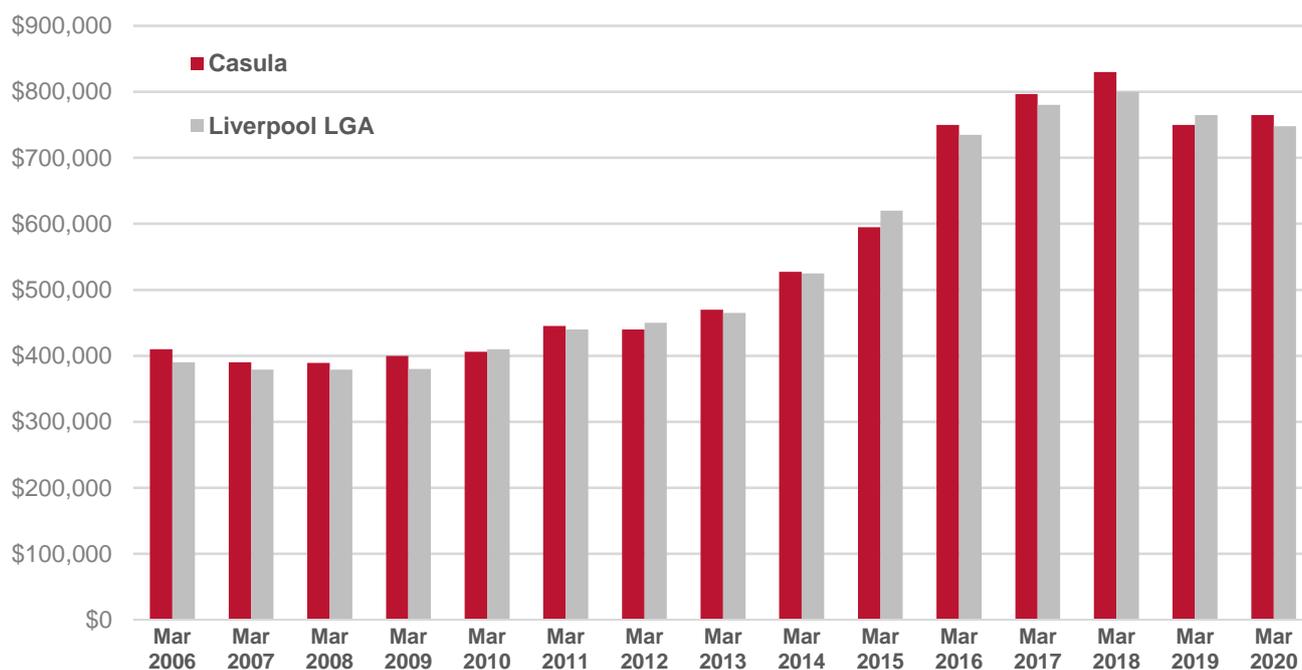


CHART 3.4. HOUSE SALES VOLUME

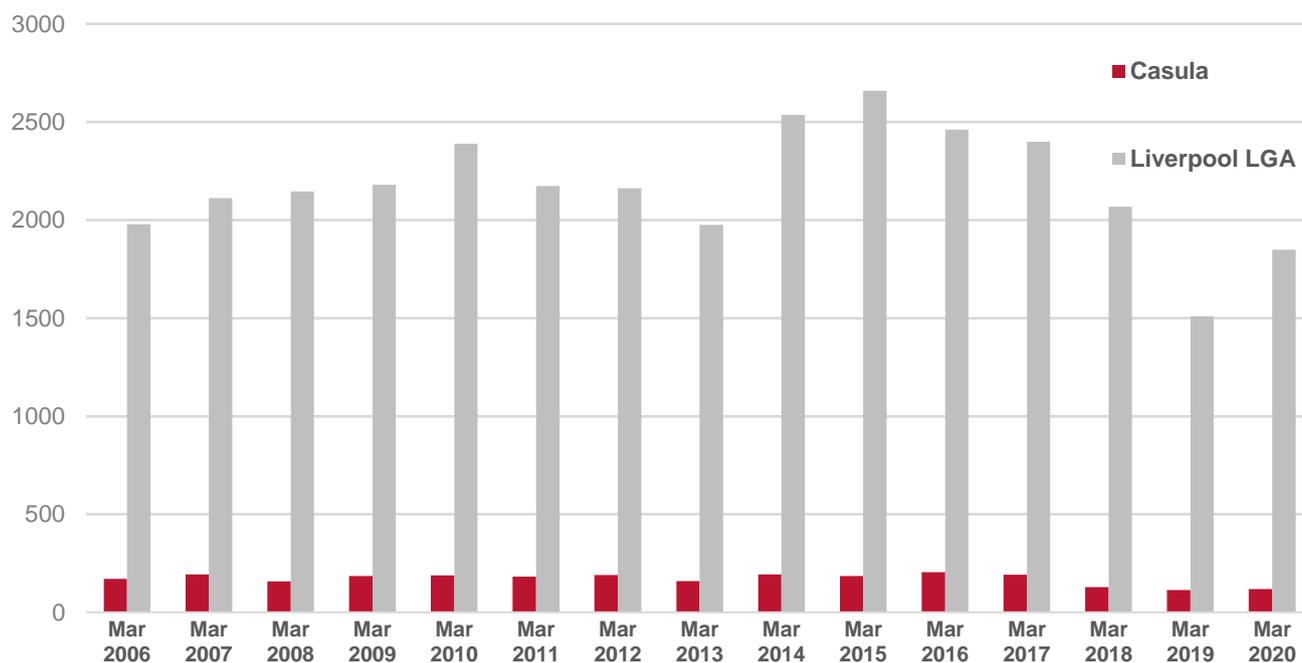


CHART 3.5. MEDIAN UNIT PRICES

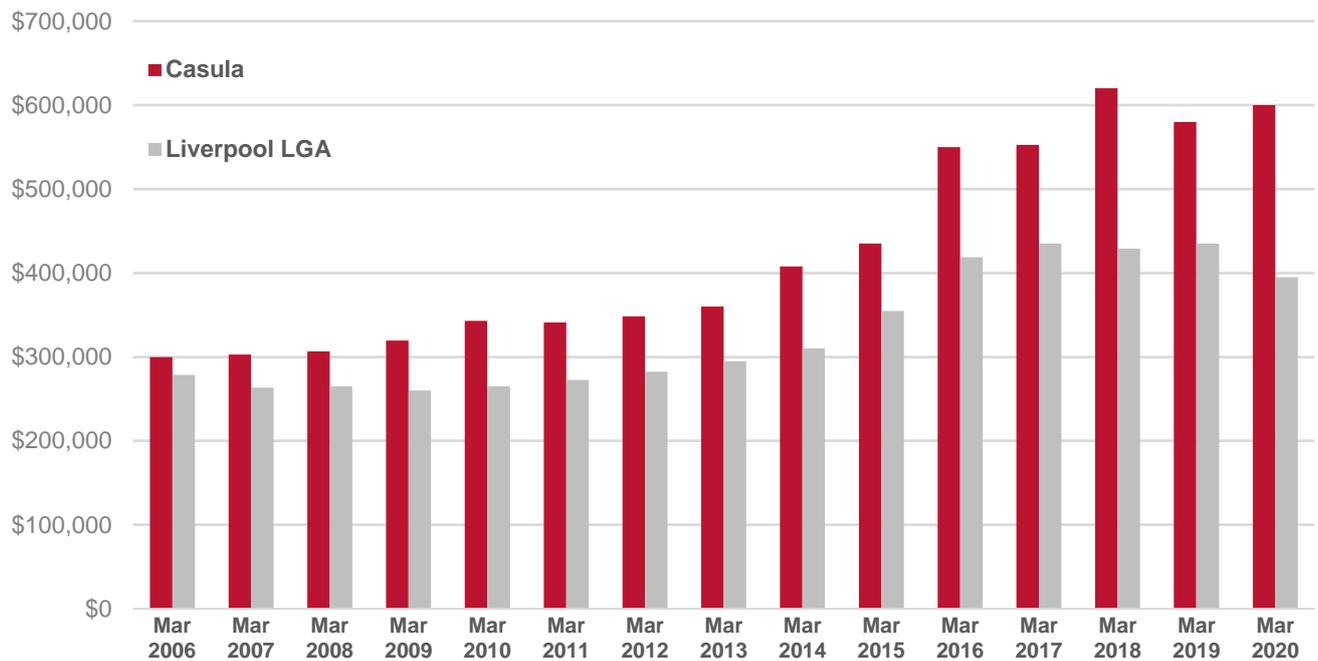
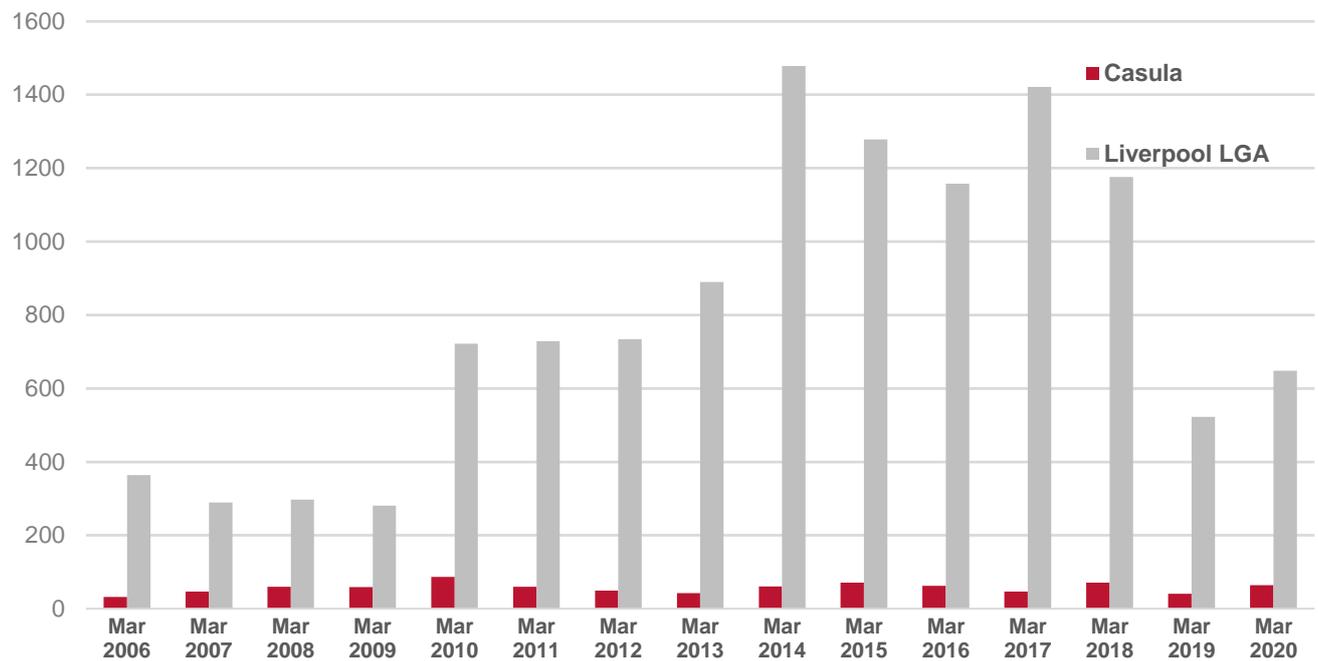


CHART 3.6. UNIT SALES VOLUME



3.4. Factors Influencing Demand

- i. There are several high-level factors that have driven growing demand for permanent residential aged care in recent years, including the following:
 - **Ageing Population:** the key driver of demand for aged care facilities throughout Australia is the ageing population. As outlined previously in Section 2 of this report, the catchment area and broader Australian population continues to age at an accelerated rate, in-line with rising life expectancy.
 - **Government Funding:** increasing aged care funding through subsidies and supplements.
 - **Health Outcomes:** rising prevalence of chronic diseases such as obesity and diabetes are associated with increased care requirements.
 - **Increased Wealth:** with greater net worth/affluence, prospective aged care residents are able to demand more choice and quality than has previously been available.
 - **Independent living:** the rising popularity of retirement/independent living facilities has increased the need for integrated aged care facilities that allow residents to age in place and easily transition to aged care.
- ii. Each of these factors is relevant to the Casula catchment area and is likely to drive demand for aged care facilities throughout the region in future years.

3.5. Aged Care Penetration Rate

- i. The proportion of persons in aged care accommodation varies across age brackets. Table 3.9 details the current penetration rate for permanent residential aged care across various age brackets, based on data from the Department of Health's Aged Care Snapshot 2019.
- ii. As shown, across New South Wales, some 4.5% of persons aged 65 and older live in care accommodation, with the highest penetration rate being for persons aged 90 years or older (31.4%). These penetration rates are generally in-line with the Australian benchmark of 4.4% and 31.8%, respectively.
- iii. Chart 3.7 and Map 3.3 highlight the net internal migration of persons aged 65 years or older by SA2 and SA3 region. As highlighted, the Liverpool region has typically experienced negative net immigration into the region (negative retention of aged persons). A number of factors could contribute to this trend, including but not limited to:

- Residents relocating to coastal or rural areas, or closer to a range of community facilities;
 - Residents locating closer to relatives;
 - The limited availability of aged care facilities within the region;
 - Pricing and affordability concerns;
- iv. Overall, this net loss (migration) of over 65s away from the region reflects unnecessary leakage which should look to be reduced (retention) through increased supply and quality of aged care options.

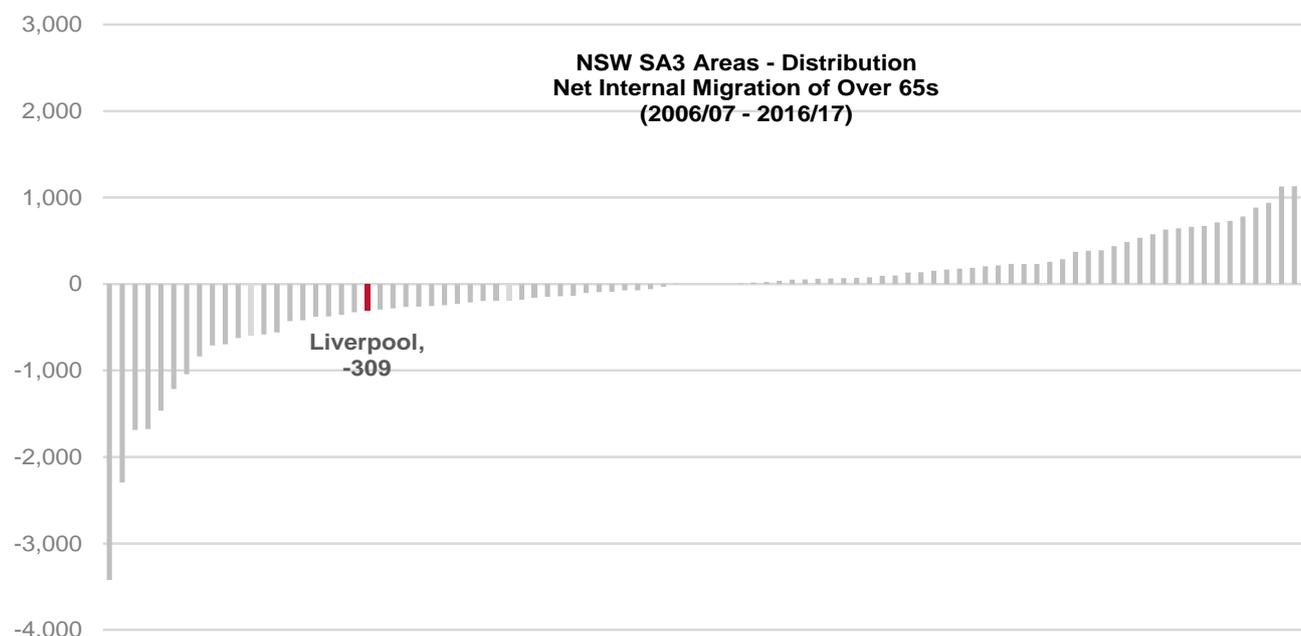


TABLE 3.7. PERMANENT RESIDENTIAL AGED CARE PENETRATION RATE, 2019

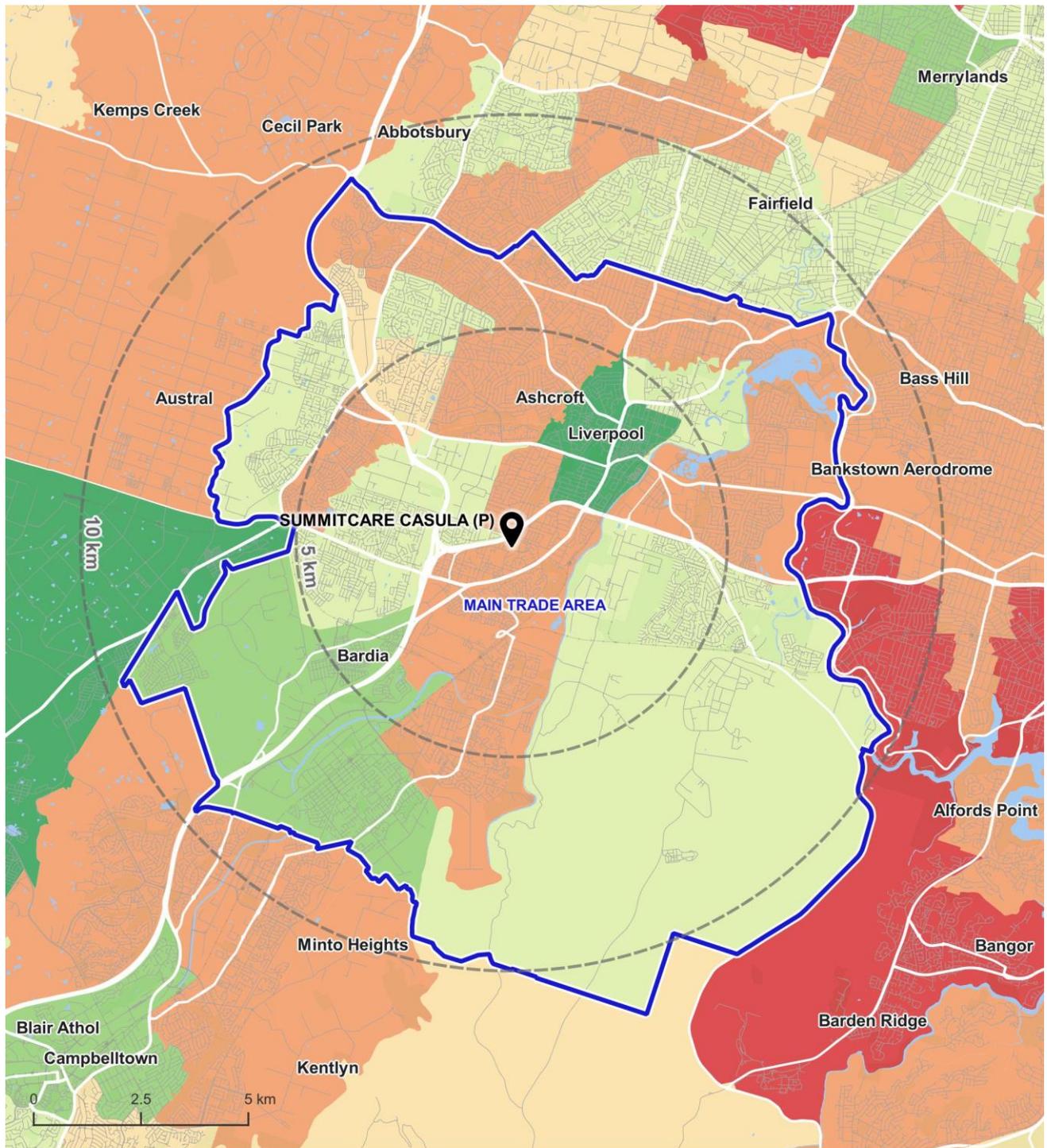
Component/Age Bracket	NSW		Australia	
	Est. Population as at 30 June 2018	(Total) (% of Total)	(Total) (% of Total)	(Total) (% of Total)
< 65 Years	6,820,128	83.8%	21,418,039	84.2%
65 – 69 Years	395,398	4.9%	1,225,624	4.8%
70 – 74 Years	342,925	4.2%	1,056,325	4.2%
75 – 79 Years	240,894	3.0%	732,387	2.9%
80 – 84 Years	168,243	2.1%	502,902	2.0%
85 – 89 Years	105,995	1.3%	312,213	1.2%
90 + Years	<u>67,392</u>	<u>0.8%</u>	<u>196,604</u>	<u>0.8%</u>
Total Persons	8,140,975	100%	25,444,094	100%
Total Persons Aged 65+	1,320,847	16.2%	4,026,055	15.8%
Persons in Permanent Residential Aged Care	(Total)	(Penetration Rate %)*	(Total)	(Penetration Rate %)*
< 65 Years	1,946	0.0%	5,606	0.0%
65 – 69 Years	2,245	0.6%	6,729	0.5%
70 – 74 Years	4,117	1.2%	12,455	1.2%
75 – 79 Years	6,283	2.6%	19,235	2.6%
80 – 84 Years	10,438	6.2%	31,608	6.3%
85 – 89 Years	14,743	13.9%	44,572	14.3%
90 + Years	<u>21,130</u>	<u>31.4%</u>	<u>62,499</u>	<u>31.8%</u>
Total Persons	60,902	0.7%	182,704	0.7%
Total Persons Aged 65+	58,956	4.5%	177,098	4.4%

*Penetration Rate = proportion of persons in age bracket that are residential aged care clients
 Source: Department of Health - Aged care data snapshot 2019 Fourth Release

CHART 3.7. NET INTERNAL MIGR. PERSONS AGED 65+, NSW SA3 – 2006/07 – 2016/17



MAP 3.3. NET INTERNAL MIGRATION (BY SA2) - PERSONS AGED 65 YEARS OR OLDER



Annual Net Internal Migration of Residents Aged 65+ by SA2 (2016-17)



3.6. Catchment Area Aged Care Demand Analysis

- i. Table 3.10 provides an analysis of the likely demand for permanent residential aged care facilities across the Casula catchment area, based on the New South Wales penetration rate benchmark and the distribution of age brackets across the catchment area. Key points to note are as follows:

Population

- Across Australia, some 15% of the total population was aged 65 years and older as at 2017, up from 9% in 1977. The number and proportion of older Australians is expected to continue to grow. By 2057, official projections indicate that some 22% of the population will be aged 65 years or older.
- The Australian Institute of Health and Welfare (AIHW) provides official population forecasts by detailed age bracket over the period to 2036. For the SA2 areas that make up the defined catchment area, the number of persons aged 65 years or older is projected to grow at an average annual rate of 3.6% over the period to 2036.
- These official forecasts have been adopted for the purposes of this assessment (by age bracket) and would indicate a total of 38,436 persons (11.5%) aged 65 years and older within the catchment area currently (2020), increasing to 66,582 by 2036.

Supply

- As outlined previously in this report, there are currently some 1,849 permanent residential aged care places provided across the catchment area.
- Based on the latest AIHW data, the current proportion of unused places across the South West Sydney region is estimated at 2.4% and is considered to reflect a natural vacancy rate. Therefore, the estimated number of occupied places across the catchment area is 1,804.
- As outlined previously in Section 3.2.2, a net addition of 408 aged care beds are assumed to become operational over the 2020 – 2026 period. This would lead to a total provision of some 2,257 beds by this time.

Demand

- Based on the New South Wales permanent residential aged care penetration rate benchmark and the distribution of age brackets across the catchment area, a total of 1,448 catchment area residents are estimated to require aged care places in 2020.

- In addition, a range of other factors are likely to drive demand for catchment area aged care facilities, including:
 - The **regional attraction** of the catchment area or proposed site. In particular, the catchment area would be attractive for residents located to the west and south-west, by way of excellent regional accessibility and proximity to a range of facilities.
 - The possible **undersupply of places elsewhere** beyond the catchment area.
 - **Existing facilities which target a specific demographic** and, as such, would draw more thinly from a far greater region. Examples include the Indochinese Aged Care Service and Russian Relief Association within the catchment.
 - The location of many existing catchment area facilities on or near to the edge of the defined catchment area boundary (such as around Liverpool, Cabramatta, Chipping Norton and Prestons). Facilities just beyond the catchment area are likely to draw a proportion of residents from within the defined Casula catchment area, while those within the catchment and near the boundary (such as the proposed Bolton Clarke Willowdale) are likely to **draw substantially from beyond**.
 - Based on this, a weighted average of 24.8% of existing aged care residents are assumed to have come from beyond the defined catchment area. This would indicate estimated additional demand for some 359 places in total for 2020.
- ii. Based on this analysis, the aged care market across the catchment area is currently considered to be in equilibrium (3 place undersupply). If no new aged care beds were to be added to the catchment area, projected population growth and ageing would lead to an indicative undersupply of some 1,568 places by 2036.
 - iii. This represents net additional demand for some 98 aged care beds per year within the catchment area. Assuming the net addition of some 408 aged care beds to the area by 2026, there would still be an indicative undersupply of some 54 beds by this time, increasing to 1,170 beds in 2036.
 - iv. In this respect, the Casula development would represent just 18 months of aged care demand.
 - v. It is important to note that this analysis is indicative only and does not take into consideration a range of mitigating factors which are likely to impact (and in most cases-increase) demand for permanent residential aged care, including:
 - **Changing Penetration Rate:** future change in the penetration rate for aged care across each aged bracket would impact demand.

- **Cannibalisation:** this analysis examines the indicative under/oversupply of permanent residential aged care places only. This does not factor in the possible cannibalisation of places by the subject development (or other market entrants) on surrounding facilities. This is typically higher in areas with significant oversupply of beds, unlike within the subject catchment area. These impacts would affect the overall number of occupied beds in the catchment.
 - **Increased Life Expectancy:** longer lifespans result in a slower (less frequent) turnover of beds.
 - **Leakage:** given the current estimated undersupply of aged care places, aged care residents may currently be being lost to facilities located beyond the catchment area. Leakage will always occur, despite the provision of places within a catchment, however, can be greatly reduced through increased supply and quality (i.e. retention).
- vi. Overall, these findings are in-line with investigations by this office into the vacancy rate of existing aged care facilities within the catchment area. The indicative level of supply and demand in the context of a large catchment area reflects a market which is generally at equilibrium for the short term.
- vii. However, if suitable facilities are not continuously provided within the catchment area, the associated leakage would increase as a growing number of prospective aged care residents cannot be retained.
- viii. In addition, a unique, quality offer such as the subject development, coupled with an attractive location could also draw significant interest from beyond the defined catchment area.
- ix. Overall, under this analysis, demand for aged care facilities is broadly in equilibrium over the short term (to 2021) but will transition rapidly into a state of undersupply if new beds are not provided over the medium to long term (i.e. post 2021).

TABLE 3.8. PERMANENT AGED CARE DEMAND ASSESSMENT, 2016 – 2036

Component	Estimated		2020	2021	Projected		
	2011	2016			2026	2031	2036
Proportion of Catchment Area Population							
< 65 Years	90.4%	89.4%	88.5%	88.2%	86.6%	85.1%	82.9%
65 – 69 Years	3.1%	3.8%	3.9%	4.0%	4.5%	4.6%	4.8%
70 – 74 Years	2.4%	2.6%	3.1%	3.1%	3.4%	3.9%	4.5%
75 – 79 Years	1.8%	1.9%	2.0%	2.1%	2.6%	2.9%	3.3%
80 – 84 Years	1.3%	1.3%	1.4%	1.4%	1.6%	2.1%	2.8%
85 – 89 Years	0.7%	0.8%	0.8%	0.8%	0.9%	1.0%	1.2%
90 + Years	<u>0.3%</u>	<u>0.3%</u>	<u>0.3%</u>	<u>0.3%</u>	<u>0.4%</u>	<u>0.4%</u>	<u>0.5%</u>
Residents Aged 65+	9.6%	10.6%	11.5%	11.8%	13.4%	14.9%	17.1%
Catchment Area Population							
< 65 Years	246,043	275,001	296,424	300,762	316,977	323,983	321,778
65 – 69 Years	8,442	11,575	13,187	13,758	16,391	17,477	18,635
70 – 74 Years	6,480	7,885	10,222	10,711	12,539	14,765	17,386
75 – 79 Years	4,857	5,823	6,657	7,024	9,564	11,122	12,935
80 – 84 Years	3,584	3,936	4,659	4,779	5,838	7,956	10,842
85 – 89 Years	1,968	2,449	2,642	2,724	3,239	3,955	4,829
90 + Years	<u>866</u>	<u>992</u>	<u>1,070</u>	<u>1,103</u>	<u>1,311</u>	<u>1,601</u>	<u>1,956</u>
Residents Aged 65+	26,197	32,659	38,436	40,098	48,883	56,877	66,582
Supply of Residential Aged Care Places			Existing	Projected			
Total Places			1,849	1,993	2,257	2,257	2,257
Natural Vacancy Rate (ACPR Region)	2.4%		45	49	55	55	55
Est. Occupied Places			1,804	1,944	2,202	2,202	2,202
Demand for Permanent Aged Care		Penetration Rate %*	Existing	Projected			
< 65 Years	0.03%		85	86	90	92	92
65 – 69 Years	0.6%		75	78	93	99	106
70 – 74 Years	1.2%		123	129	151	177	209
75 – 79 Years	2.6%		174	183	249	290	337
80 – 84 Years	6.2%		289	296	362	494	673
85 – 89 Years	13.9%		367	379	450	550	672
90 + Years	31.4%		<u>335</u>	<u>346</u>	<u>411</u>	<u>502</u>	<u>613</u>
Total			1,448	1,497	1,807	2,205	2,701
Demand from Beyond Catchment		Est. Proportion %					
Residents Beyond Catchment Area	24.8%		359	371	448	547	670
Indicative Oversupply or Undersupply							
Total Indicative Under/Oversupply			-3	76	-54	-550	-1,170
• With SummitCare Casula (+142 beds)			-3	76	89	-407	-1,027

Source: ABS Catalogue 4430DO030_2015, Department of Health - Aged care data snapshot 2019 Fourth Release



4 INDEPENDENT LIVING POTENTIAL

This section of the report considers the potential for independent living facilities throughout the defined Casula catchment area, as compared with relevant benchmarks.

“Independent living is a general term for downsizing to structured communities that provide safe homes for ageing, reduced costs of living and neighbours that provide companionship. The operator provides ongoing management of the community.” - Aged Care 101

4.1. National Independent living Overview and Benchmarks

- i. There are various forms of independent living, each of which generally target older people who wish to or need to downsize, including:
 - Retirement Villages
 - Land Lease Communities
 - Serviced Apartments
 - Home Care Independent living
 - Co-located Villages
 - Rental Villages
- ii. Different independent living arrangements each offer a variety of facilities and benefits to residents, but all are generally designed to support and enhance the lives of aged persons.
- iii. There are enormous challenges in how to care for and house an ever-increasing ageing population. To meet this challenge, it is vital that a wide range of choice in retirement accommodation is available. Retirement villages have a great role to play as they:
 - Enable people to downsize and live affordably as they age.
 - Allow people to live in a purpose-built community facility with full-scale infrastructure.
 - Enable residents to age near to areas they live, maintaining networks and social connections.

- Provide a communal and supportive living environment.
 - Reduce the economic burden across all levels of Government in support for older people.
- iv. Traditionally, independent living and residential aged care facilities have operated separately from each other. As the average age of people entering these environments increases, however, the co-location of independent living units, serviced apartments (assisted living) and residential aged care facilities has resulted in integrated communities where people can age in place.
- v. Across Australia, a total of 149,503 independent living dwellings were recorded as occupied as at the 2016 Census. Based on an average of 1.3 persons per dwelling (*Retirement Census 2019*), this represents a total of 194,354 persons residing in independent living facilities at the time (refer Table 4.1).
- vi. As illustrated in Table 4.1, it is therefore estimated that approximately 5.2% of persons aged 65 years or older reside in independent living facilities, which represents the national penetration rate. Across the Sydney metropolitan area, the penetration rate is lower, at 4.8%.
- vii. The Property Council of Australia's *National Overview of the Retirement Village Sector (2014)* demonstrated that independent living facilities not only improve residents' lifestyle, but also provide significant savings for local and federal governments by delaying residents' entry into the government funded aged care facilities. The savings generated for the health care sector were around \$2.16 billion per year at the time, with fewer hospital and general practitioner visits, earlier discharge from hospital and better mental health.
- viii. PWC and The Property Council undertake a *Retirement Census* each year, with the latest results published in November 2019. Some of the key findings from that report include:
- The average age of residents in a retirement village is 81 years, with 74 years being the average age of residents entering villages.
 - The average two-bedroom independent living unit price across Australia is 64% of the median house price in the same postcode, with the Sydney metropolitan average at 45% of the median house price.
 - Across Australia, 29% of independent living facilities are co-located with aged care or have aged care located within 500 metres. In New South Wales, this figure was higher, at 34%.
- ix. The Casula site offers many attributes which respond to the difficult challenges of seniors' accommodation, not least of which is the prospect of co-locating independent living with aged care facilities. This provides the opportunity for new residents to take advantage of the other facilities provided at the subject site and allow residents to age in place as they transition to aged care.

- x. Retirement Villages are the most popular form of independent living. Villages offer an independent lifestyle with 1 – 3 bedroom villas or apartments.
- xi. Typically, retirement villages are provided across a single level or low-rise development (villas), featuring landscaped grounds and other facilities and services, or; in the form of medium-high density living (apartments).
- xii. The multi-level concept, such as that which is proposed at the subject site, is increasingly prevalent throughout Australia and in particular Sydney, where residential property prices are high and sufficient land is difficult to come by.

TABLE 4.1. INDEPENDENT LIVING PENETRATION RATE BENCHMARKS, 2016 CENSUS

GCCSA	Occupied Retirement Village Dwellings	No. Persons (@ 1.3 pers per dw)	Persons Aged 65+ Years	Proportion of 65+ in RL
Greater Sydney	25,268	32,848	682,210	4.8%
Rest of NSW	21,021	27,327	519,722	5.3%
Greater Melbourne	21,760	28,288	602,276	4.7%
Rest of Vic.	6,530	8,489	298,491	2.8%
Greater Brisbane	18,356	23,863	311,536	7.7%
Rest of Qld	20,891	27,158	397,054	6.8%
Greater Perth	14,971	19,462	274,774	7.1%
Rest of WA	2,522	3,279	93,798	3.5%
Greater Adelaide	12,422	16,149	217,002	7.4%
Rest of SA	3,247	4,221	180,811	2.3%
Greater Hobart	1,120	1,456	37,692	3.9%
Rest of Tas.	1,159	1,507	87,928	1.7%
Greater Darwin	208	270	9,095	3.0%
Rest of NT	28	36	2,135	1.7%
Australia	149,503	194,354	3,714,524	5.2%

Source: ABS Census 2016 Table Builder



4.2. Independent living Facilities Within Catchment Area

4.2.1. Existing Independent living Facilities

- i. Table 4.2 and Map 4.1 provide an overview of existing independent living facilities within the Casula catchment area. As shown, there are currently just six facilities, comprising a total of 630 places, or an average of 105 places per facility. This assumes the ongoing construction of Willowdale Retirement Village is completed by 2020 at a total of 268 dwellings.
- ii. Aveo Maple Grove is the closest independent living facility to the Casula site, located at 25 – 29 Pine Street in Casula, some 1.3 km away. Other facilities are located over 3 km from the Casula site, many of which are to the south and west. Generally, it is immediately clear that there is a lack of existing independent living options within the Casula and broader Liverpool region.
- iii. In addition to retirement villages within the region, a range of Senior Living Units are also supplied by the Land and Housing Corporation (LAHC). The LAHC is a Public Trading Enterprise which is responsible for the New South Wales Government's social housing portfolio. The LAHC owns and manages some 144,000 social housing dwellings across New South Wales.
- iv. The LAHC is playing a key role in the Communities Plus program – a \$22 billion building program to supply up to 23,000 social housing dwellings, 500 affordable housing and 40,000 private dwellings.
- v. As part of its building program, LAHC also provides a range of senior living units. These units are not regulated under the Retirement Villages Act, however, they offer a range of needs within the home itself to assist seniors.

TABLE 4.2. INDEPENDENT LIVING FACILITIES WITHIN CATCHMENT AREA

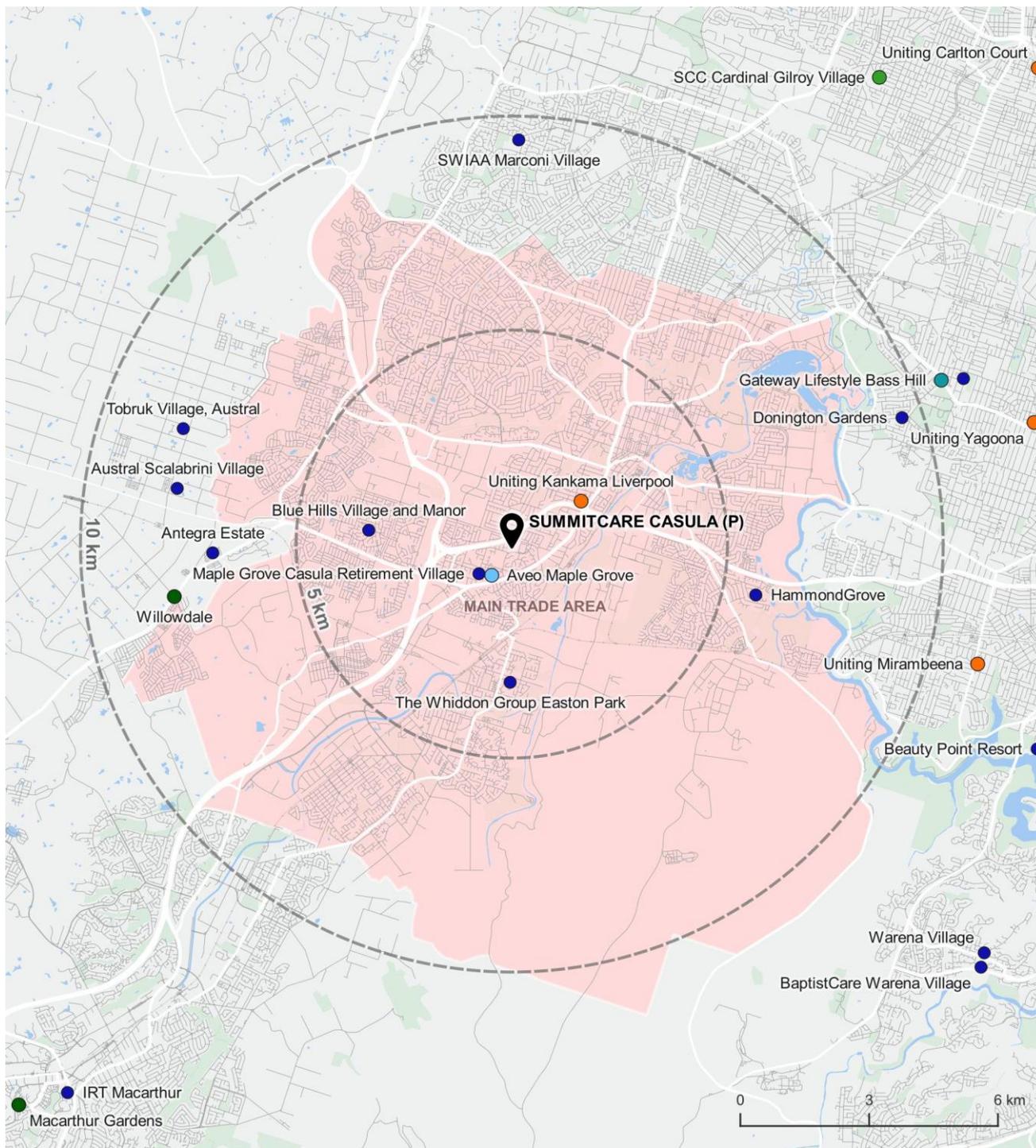
Service Name	Address	Suburb	Residential Places		Provider Name	Organisation Type	Dist. from Site (km)
			Total	Vacant			
Within Catchment Area							
Aveo Maple Grove	25-29 Pine Street	Casula	112	1	Aveo	Private Incorporated Body	1.3
Uniting Kankama Liverpool	14 Boundary Road	Liverpool	26	0	Uniting Care Ageing NSW & ACT	Religious	3.3
The Whiddon Group Easton Park	81 Belmont Road	Glenfield	27	1*	The Whiddon Group	Charitable	4.8
Blue Hills Village and Manor	25- 27 Tulich Avenue	Prestons	152	5	Independent Retirement	Private Incorporated Body	4.9
HammondGrove	11/23 Judd Avenue	Hammondville	45	3	HammondCare	Charitable	9.7
Willowdale Retirement Village	245 Jamboree Avenue	Denham Court	268	6	Stockland Retirement	Private Incorporated Body	10.0
Total			630	16			

**Calculated based on vacancy rate of other facilities in the catchment area*

Source: LIQ Database



MAP 4.1. INDEPENDENT LIVING FACILITIES



- Southern Cross Care
- Uniting Care Ageing
- Aveo
- Stockland Retirement
- Gateway Lifestyle
- Other Retirement Village



4.2.2. Future Independent living Facilities

- i. There are currently no proposed independent living facilities throughout the region, with the only development of relevance being the continued construction of Willowdale Retirement Village, which has approximately 60 dwellings left to reach completion. For the purposes of this assessment, the final yield (268 dwellings) of the development is assumed from 2020.
- ii. There are three developments currently proposed by the LAHC which will include a range of senior living units, including:
 - 55 Grove Street at Casula is proposed to include 18 senior living units.
 - 18 Hilda Avenue at Casula will include 8 two-bedroom units and 4 one bedroom units.
 - 36-40 Miller Road at Miller will comprise of 12 senior living units.
- iii. Senior Living units as part of LAHC developments within the catchment area have generally been small and lack many additional facilities offered by retirement villages, such as onsite manager, clubhouses, libraries, lawn bowls etc.

4.2.3. Range of Products, Composition and Pricing

Within the Catchment Area

- i. Table 4.3 provides a summary of the key features and facilities of existing independent living facilities within the catchment area. Key points to note include:
 - Four villages are co-located with an aged care facility (66.6%, while one is also proposed to locate adjacent to the Willowdale Retirement Village.
 - Villages are typically in a sprawling single-level format, comprising villas.
 - HammondGrove represents the only village offering villas and apartments.
 - Two-bedroom dwellings are the common room structure across the villages.
 - Villages typically include an emergency/safety/alert system or similar with a 24-hour service.
 - Most villages include a range of community and other facilities on site, such as clubhouses, pools, gyms, bowling greens, salons and the like.
- ii. Table 4.4 provides a summary of the composition, sizing and pricing of available independent living dwellings throughout the catchment area, based on a survey undertaken by this office (refer Table 4.5). Key points to note regarding available data on apartment/unit products include:

- On average, available rooms typically include at least 1.5 bathrooms, except for one-bedroom apartments.
 - The median two-bedroom apartment price was \$525,000, with listed prices ranging from \$380,000 through to \$640,000.
 - The median three-bedroom apartment price was \$695,000, with listed prices ranging from \$550,000 through to \$750,300.
- iii. Charts 4.1 and 4.2 illustrate the median and average apartment/villa price across various room sizes, as compared with median and average house/unit price for the suburb of Casula and the Liverpool LGA. As shown, the median unit price for a two-bedroom apartment is higher than the median unit price of the Liverpool LGA. It is important to note that this is based on a small sample size of independent living apartments, many of which are located some distance from Casula. However, this also provides an indication for the strong demand for and limited supply of independent living apartments within the catchment area.



TABLE 4.3. CATCHMENT AREA FACILITIES – SERVICES & AMENITIES

Service Name	No.	Aged Care on Site	Dwelling Type			Bedrooms				Safety		Community Facilities							
			Villa	Apt.	Mix	One	Two	Three	Four+	24H	Emerg.	Club	Library	Pool	Gym	Bowls	Salon	Other	
Within Catchment Area																			
Aveo Maple Grove	112		•			•	•			•	•		•			•	•	•	
Uniting Kankama Liverpool	26	•	•			•	•			•	•							•	
The Whiddon Group Easton Park	27	•		•			•				•				•		•	•	
Blue Hills Village and Manor	152	•	•			•	•	•					•	•			•	•	•
HammondGrove	45	•	•	•	•		•			•	•		•	•	•	•	•	•	•
Willowdale Retirement Village	268	P	•				•	•		•	•		•	•	•	•		•	•

P = Proposed

"-" indicates No Data Available

Source: The Property Council of Australia, Location IQ Database



TABLE 4.4. CATCHMENT AREA FACILITIES – AVAILABLE ROOM SURVEY SUMMARY

Facility/Room Type	Total Number	Ave. Bathrooms	Median Advertised Price (\$'000)	Casula Price (\$'000)^ Median	ILU %
Aveo Maple Grove					
One Bedroom	0	n.a.	n.a.	n.a.	n.a.
Two Bedroom	2	2	\$403	\$765	52.6%
Blue Hills Village and Manor					
One Bedroom	2	1	\$420	\$765	54.9%
Two Bedroom	2	1.5	\$518	\$765	67.6%
Three Bedroom	1	2	\$550	\$765	71.9%
Willowdale Retirement Village					
Two Bedroom	3	1.8	\$618	\$765	80.8%
Three Bedroom	2	2	\$724	\$765	94.6%

^ Latest available data

CHART 4.1. CATCHMENT AREA VILLA PRICING VS. MEDIAN HOUSE PRICE

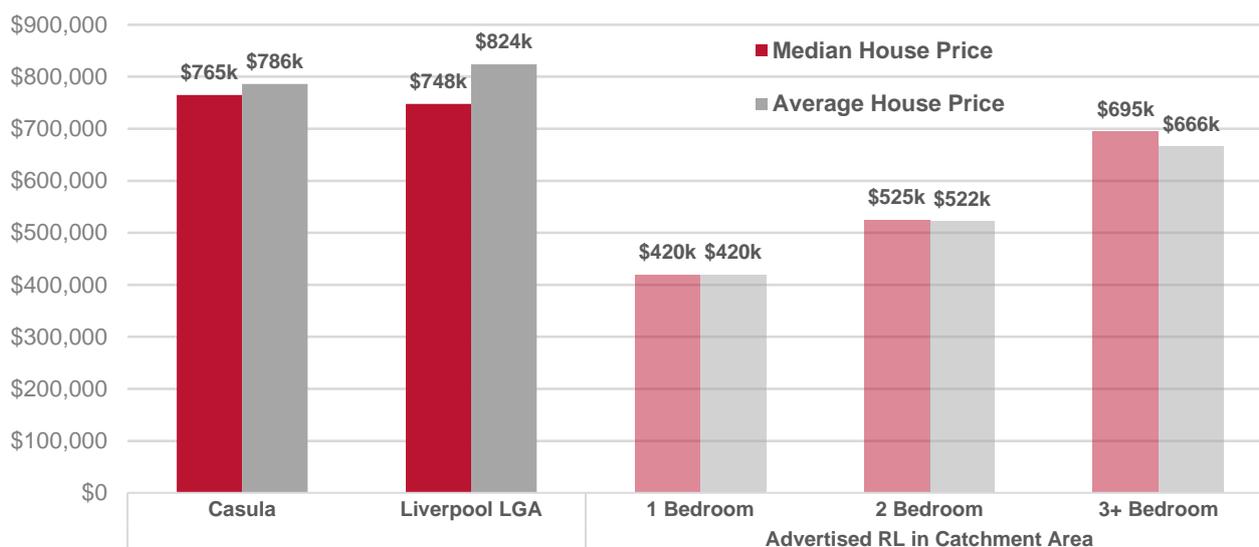


CHART 4.2. CATCHMENT AREA VILLA PRICING VS. MEDIAN UNIT PRICE

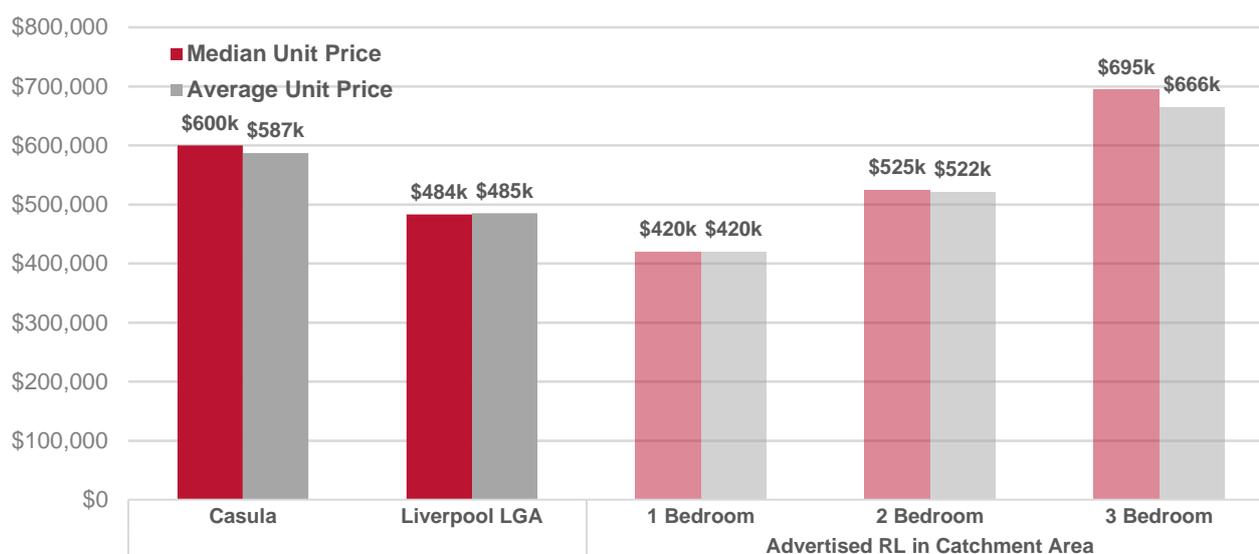


TABLE 4.5. CATCHMENT AREA FACILITIES – AVAILABLE ROOM SURVEY

Dwelling Name/No.	Dwell. Type		Bedrooms			Bathroom			Car Spaces		Advertised Price (\$'000)
	Villa	Apt.	1	2	3+	1	1.5	2+	1	2	
Aveo Maple Grove											
Villa	•			•		•			•		\$425
Villa	•			•		•			•		\$380
Blue Hills Village and Manor											
Villa	•			•			•		•		\$510
Villa	•			•			•		•		\$525
Villa	•		•			•			•		\$420
Villa	•				•			•	•		\$550
Villa	•		•			•			•		\$420
Willowdale Retirement Village											
Villa 331	•				•			•		•	\$695
The Daylily	•			•			•		•		\$555
The Freesia	•			•				•	•		\$618
The Saffron	•			•				•		•	\$640
The Maple	•				•			•		•	\$753

Source: Phone and Online Surveys

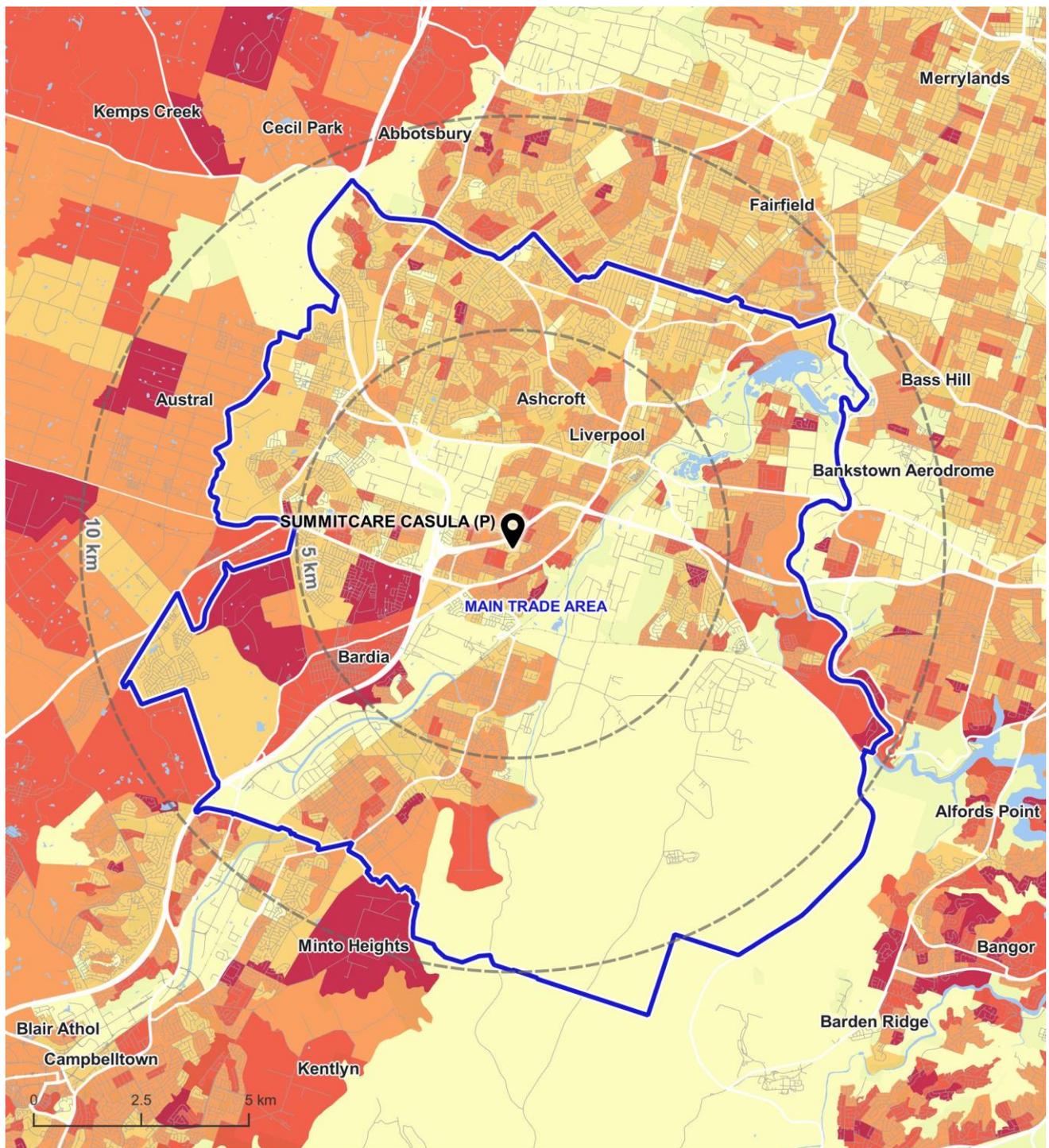
"-" indicates No Data Available



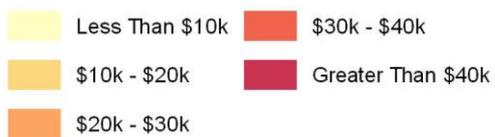
4.3. Factors Influencing Demand

- i. The factors which influence demand for independent living facilities are generally similar to those which influence demand for aged care, as outlined previously in Section 3.4 of this report. However, independent living can also help to alleviate many challenges faced by aged persons, such as housing affordability, maintenance/upkeep costs, a lack of social interaction and other economic burdens.
- ii. Other key indicators of demand are likely to include income (ability to afford premium products), as well as the prevalence of apartment living.
- iii. Map 4.2 provides an illustration of average per capita income levels of persons aged 65 years and older throughout the region, highlighting that the subject site and broader catchment area form part of a mixed-income area, which reflects the general pattern throughout Sydney's South West. There are several pockets of affluent retirement-aged persons in close proximity to the subject site and south-west.
- iv. Map 4.3 illustrates the location and number of apartments within the surrounding region. As shown, there is a prevalence of higher density living within the region, particularly surrounding Liverpool. As such, apartments and higher density living would not be a foreign concept for residents of the surrounding region and the prospect of downsizing to an apartment may also be attractive for many older residents.

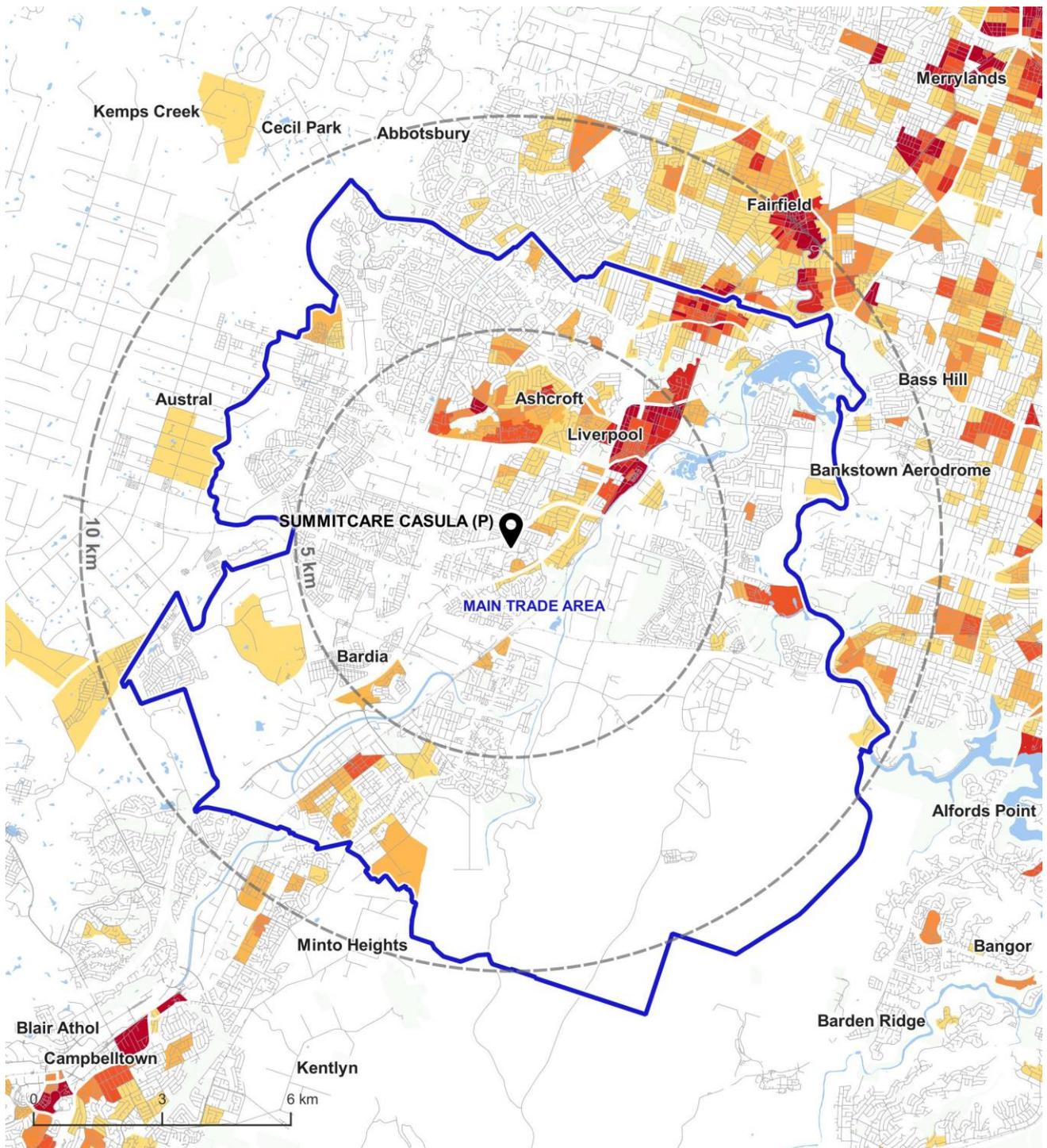
MAP 4.2. AVERAGE PER CAPITA INCOME LEVEL (OVER 65 YEARS OLD), 2016 CENSUS



Average Annual Income per Capita of Persons Aged 65+ by SA1



MAP 4.3. NUMBER OF UNIT/APARTMENT DWELLINGS (2016)



Total Number of Apartments by SA1



4.4. Catchment Area Demand Analysis

- i. Table 4.6 provides an analysis for the likely demand for retirement village facilities across the Casula catchment area, based on the Sydney penetration rate benchmark and the proportion of residents aged over 65 across the catchment area. Key points to note are as follows:
- Section 3.6 previously indicated that the population of residents aged 65 years and older is estimated at 38,436 (2020) and is expected to increase to 66,582 by 2036.
 - There are some 630 dwellings across six retirement villages within the catchment area (refer Table 6.2).
 - Based on a phone survey undertaken by this office, there were 16 vacancies across the five villages, indicating an occupancy rate of 97.5%. Where vacancy information was not available, the occupancy rate of other villages has been assumed.
 - Based on the most recent *Retirement Census (2019)*, an average of 1.3 persons are accommodated per dwelling. Assuming 1.3 persons per dwelling, this would indicate that a total of some 798 persons currently reside within independent living facilities (based on an occupancy rate of 97.5%) across the catchment area, increasing to 916 by 2025 assuming the subject development proceeds (93 places).
 - The Sydney metropolitan penetration rate for retirement villages is 4.8%. However, as stated previously, a portion of this demand is likely to be met by the supply of senior living units as part of LAHC. As such, a penetration rate of 4.3% has been used for the purposes of this assessment.
 - Similar to aged care, a range of factors are likely to drive demand for retirement facilities for the catchment area. For example, Willowdale Retirement Village is situated at the outskirts of the catchment area and as such, is likely to receive a significant proportion of its demand from beyond the catchment area. Based on this, a weighted average of 25.6% of existing retirement village residents are assumed to have come from beyond the defined catchment area. This would indicate an additional demand for 423 places.
 - Based on this analysis, there is currently an indicative undersupply of 1,277 places (983 dwellings) across the catchment area, which is projected to increase to 2,673 places (2,056 dwellings) by 2036.
 - The population growth alone would demand an additional 58 dwellings per year. Consequently, the proposed development represents less than 2 years of demand. Even assuming that the

market is currently at equilibrium (i.e. supply and demand is met), the catchment area would still demand an additional 1,074 dwellings over the period to 2036.

- However, for the market to be at equilibrium currently, this would reflect a very low penetration rate of 1.65% (less than half the benchmark level).
- ii. It is important to note that this analysis is indicative only and does not take into consideration a range of mitigating factors which are likely to impact (and in most cases-increase) demand for independent living at the subject site, including:
- **Changing Penetration Rate:** future change in the penetration rate for independent living would impact demand.
 - **Appeal of the Subject Development:** given independent living is more dependent on choice than aged care (generally based on need), a quality development would likely encourage more residents to pursue an independent living arrangement at the subject site.
 - **Cannibalisation:** this analysis examines the indicative under/oversupply of independent living dwellings only. This does not factor in the possible cannibalisation of demand by the subject development (or other market entrants) on surrounding facilities. This is typically higher in areas with significant oversupply of units/villas, unlike within the subject catchment area.
 - **Leakage or Retention of Existing Arrangement:** given the current estimated undersupply of independent living places, prospective catchment area residents may be being lost to facilities located beyond the catchment area or choose to remain at their existing homes longer due to lack of choice or availability. Leakage will always occur, despite the provision of dwellings within a catchment, however, can be greatly reduced through increased supply and quality (i.e. retention).
- iii. The indicative level of 'undersupply' in the context of a large catchment area reflects a market which is significantly below equilibrium. If suitable facilities were provided within the catchment area, the subject site would likely absorb some of this indicative pent-up demand. In addition, a unique, quality offer, coupled with an attractive location could also draw significant interest from beyond the defined catchment area.
- iv. Overall, under this analysis, there is a significant indicative undersupply of independent living dwellings throughout the Casula catchment area. With continued population growth, the existing level of undersupply is projected to worsen (i.e. increase) over the forecast period to 2036.

TABLE 4.6. INDEPENDENT LIVING DEMAND ASSESSMENT, 2020 – 2036

Component	Estimated		2020	2021	Projected		
	2011	2016			2026	2031	2036
Proportion of Catchment Area Population							
< 65 Years	90.4%	89.4%	88.5%	88.2%	86.6%	85.1%	82.9%
65 – 69 Years	3.1%	3.8%	3.9%	4.0%	4.5%	4.6%	4.8%
70 – 74 Years	2.4%	2.6%	3.1%	3.1%	3.4%	3.9%	4.5%
75 – 79 Years	1.8%	1.9%	2.0%	2.1%	2.6%	2.9%	3.3%
80 – 84 Years	1.3%	1.3%	1.4%	1.4%	1.6%	2.1%	2.8%
85 – 89 Years	0.7%	0.8%	0.8%	0.8%	0.9%	1.0%	1.2%
90 + Years	<u>0.3%</u>	<u>0.3%</u>	<u>0.3%</u>	<u>0.3%</u>	<u>0.4%</u>	<u>0.4%</u>	<u>0.5%</u>
Residents Aged 65+	9.6%	10.6%	11.5%	11.8%	13.4%	14.9%	17.1%
Catchment Area Population							
< 65 Years	246,043	275,001	296,424	300,762	316,977	323,983	321,778
65 – 69 Years	8,442	11,575	13,187	13,758	16,391	17,477	18,635
70 – 74 Years	6,480	7,885	10,222	10,711	12,539	14,765	17,386
75 – 79 Years	4,857	5,823	6,657	7,024	9,564	11,122	12,935
80 – 84 Years	3,584	3,936	4,659	4,779	5,838	7,956	10,842
85 – 89 Years	1,968	2,449	2,642	2,724	3,239	3,955	4,829
90 + Years	866	992	1,070	1,103	1,311	1,601	1,956
Residents Aged 65+	26,197	32,659	38,436	40,098	48,883	56,877	66,582
Supply of ILU							
	Persons Per Dwelling		Existing		Projected		
Existing Dwellings			630	630	728	728	728
% Occupied			<u>97.5%</u>	<u>97.5%</u>	<u>97.5%</u>	<u>97.5%</u>	<u>97.5%</u>
Total Places			614	614	710	710	710
Estimated ILU Population	1.3		798	798	922	922	922
Demand for ILU							
	Penetration Rate %*		Existing		Projected		
Residents Aged 65+	4.3%		1,653	1,724	2,102	2,446	2,863
Demand from Beyond Catchment							
	Est. Proportion %						
Residents Beyond Catchment Area	25.6%		423	441	538	626	732
Indicative Oversupply or Undersupply							
Total Indicative Under/Oversupply (Persons)			-1,277	-1,367	-1,717	-2,149	-2,673
Total Indicative Under/Oversupply (Dwellings)			-983	-1,052	-1,321	-1,653	-2,056
• With SummitCare Casula (+93 dwellings)			-983	-959	-1,228	-1,560	-1,963

Sources: ABS; Villages Listing as at June 2020; Retirement Living Census 2019; Location IQ Database



5 NEEDS ANALYSIS

The final section of this report summarises the key conclusions of the needs assessment for aged care and retirement living facilities at the Casula site.

'Need' or 'Community Need' in a planning sense is a relative concept that relates to the overall wellbeing of a community. A use is needed, for example, if it would, on balance, improve the services and facilities available in a locality. The reasonable demands and expectations of a community are important, therefore, in assessing need.

5.1. Supportability of Aged Care Facilities

- i. Based on the information outlined in this assessment, there is significant capacity for additional aged care facilities within the Casula catchment area over the medium to long term. There is solid potential for aged care facilities at the subject site, based on the following:
 - **Site Location:** the high-profile location of the site in close proximity to key retail, community and health facilities would be a key attractor. Casula has excellent regional accessibility, enjoying proximity and connection with the South Western Motorway and Hume Highway, each of which are major arterial routes throughout South West Sydney. Further, the location is a popular residential area with a wide attraction.
 - **Significant and Growing Demand:** population growth, as well as the trend of ageing population is likely to add significantly to demand for aged care facilities, with a projected undersupply of some 1,170 places by 2036 (1,027 assuming the subject development).
 - **Existing Supply:** aged care facilities within the catchment area are limited in number (particularly in and around the suburb of Casula) and characterised by relatively low vacancy rates.
 - **Location of Existing Facilities:** many existing catchment area facilities are located north/north-west of the South Western Motorway or on the outskirts of the catchment area.
 - **Quality of Competing Facilities:** a review of competing aged care facilities indicates that several are tired or old and are likely to require refurbishments/upgrades.

- **Proposed Developments:** there is currently only four planned aged care developments (including the subject proposal) across the defined catchment area. As outlined previously in Section 3.6, this development will result in a net addition of 120 aged care beds, leading to a total provision of some 1,071 beds by this time.
 - **Existing and Planned Site Composition:** the subject development is likely to provide a point of difference as one of the most modern, best-in-class facilities in the region. In addition, co-located independent living units would further add to the appeal of the site given age-in-place or transitional care prospects.
 - **Retention:** if a quality aged care facility could be provided at the subject site, there is an opportunity to reduce the level of leakage occurring to competing facilities beyond the catchment area and Liverpool LGA, as well as increasing/broadening the catchment area for the subject development.
- ii. Based on the previous demand assessment in Table 4.2, at least 1,568 additional places could likely be supported across the catchment area by 2036, not taking into consideration cannibalisation, leakage and changing penetration rates. This increased demand is projected to be met with an increase in supply of just 408 places in the short term.
- iii. Overall, it is considered that there is sufficient need and demand to support the proposed aged care development at the subject site, which will increase over the medium to longer term. The level of need and demand is also sufficient to sustain all existing and proposed facilities throughout the catchment over the long term.

5.2. Supportability of Independent Living Facilities

- i. Overall, there are several key factors that would indicate that the Casula site and catchment area would represent a strong opportunity for independent living facilities:
- **Older population:** as indicated previously, there is a growing number of aged persons within the catchment area.
 - **Wealth:** as outlined above, the subject site and broader catchment area form part of a mixed-income area who are likely to demand a range of housing choices and downsize options both now and in the future.
 - **Significant and Growing Demand:** population growth, as well as the trend of ageing population is likely to add significantly to demand for independent living facilities, with a current undersupply of 1,277 places (983 dwellings) across the catchment area, which is projected to increase to 2,673 places (2,056 dwellings) by 2036.

- **Apartment Living:** the higher prevalence of apartment living throughout the Liverpool locality and surrounds.
 - **Attractive Location:** given the provision of retail and other community facilities in close proximity, Casula is considered to be a highly desirable place to live. To this end, and as outlined previously, Casula is characterised by high strong dwelling prices.
 - **High Quality Development:** based on a review of the proposed independent living units offer, the subject development would be of an exceptionally high standard of quality, design and amenity. Such an offer would likely resonate well with the local community and represent a point of difference in the local market.
 - **Integration of Uses:** independent living units or serviced apartments and aged care at the same site would allow residents to transition into aged care (from independent living) more seamlessly and minimises barriers to entry. In addition, there is likely to be a crossover in services provided to serviced apartment and aged care residents (transport, meals, cleaning etc), which may be unified at the one location.
- ii. Based on the previous demand assessment in Table 4.6, at least 1,074 additional dwellings could likely to be supported across the catchment area by 2036 based on population growth alone, not taking into consideration cannibalisation, leakage and changing penetration rates. This increased demand is projected with no increase in supply (0 new dwellings given Willowdale has been assumed as completed) if the subject development were not to proceed.
- iii. Overall, it is considered that there is strong need and demand to support the proposed independent living units at the subject site, as well as all existing and proposed facilities throughout the catchment over the long term.

5.3. Impacts

- i. This sub-section of the report outlines the likely implications for competitive facilities from the proposed development. It is relevant to note that in any impact assessment it is difficult to be precisely model the outcomes given the existing facilities can undertake a number of actions to limit the impact:
- Refurbish/improve existing facilities.
 - Expand existing facilities.
 - Implement retention initiatives.
 - Provide additional staff or training to improve services.

- Leverage the location or co-location of facilities.
- ii. However, indicative impacts can be viewed in the context of supply and demand, as outlined previously in this report.

Aged Care

- The opening of the subject aged care facility of 142 beds in the catchment area would represent an increased provision of 7.7% currently and 6.3% by 2026.
- Further, demand for aged care facilities within the catchment area is projected to grow by some 98 aged care beds per year.
- In this respect, the Casula development would represent just 18 months of aged care demand and the additional capacity added to the market upon opening would likely be comfortably met with sufficient net additional demand – reflecting minimal or negligible cannibalisation (impacts).

Retirement Living

- The opening of the 93-unit retirement living development at the subject site would represent an increased provision of 14.8% across the catchment area.
 - However, it is important to view this increase in the context of a significant undersupply of some 983 units, which indicates the catchment area could currently support more than double the existing supply level (630 dwellings).
 - Further, demand for retirement living facilities within the catchment area is projected to grow by some 58 dwellings per year. In this respect, the Casula development would represent less than two years of potential retirement living demand within a market that is drastically undersupplied for the product.
 - In all likelihood, this pent-up demand (undersupply) would lead to the prospective independent living units being absorbed by demand from catchment area residents with negligible impacts on other facilities.
- iii. In this sense, impacts on other aged care and retirement living facilities throughout the area would be well within the normal competitive range of less than 15%. Projected impacts from the proposed development would not threaten the viability or continued operation of any facility. Further, there would be no depletion or dilution in the range of services which are available to local residents.

5.4. Employment

- i. The proposed development would result in a range of important economic benefits which will be of direct benefit to the local community. This includes significant positive employment impacts, as follows:

Ongoing Employment Generation

- Table 5.1 summarises the projected level of ongoing employment likely to be generated by the development. The employment benchmarks (jobs per 1,000 sq.m) used to calculate the indicative total jobs generated is based on typical floorspace and employment yields, as follows:
 - Retail Specialty Shops: 60 employees per 1,000 sq.m (in-line with industry benchmarks)
 - Aged Care: 25 employees per 1,000 sq.m (in-line with industry benchmarks)
 - Retirement Living: 10 employees per 1,000 sq.m (in-line with industry benchmarks)
- As outlined previously, the retail, aged care and retirement living component of the development are planned to comprise around 19,060 sq.m in combination. The development is projected to employ around 370 persons in total on an ongoing basis. 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 333.
- Based on Average Weekly Earnings data released by the ABS in November 2019 (Cat. 6302.0) for retail, as well as healthcare and social assistance workers, the net additional permanent employees would earn combined total salary/wages of some \$27.1 million at the site, reflecting additional salary/wages for the local economy, as a direct result of the development.

Construction

- Construction of the aged care and retirement living facility is estimated to incur total capital costs of some \$49.4 million, generating significant employment within the construction and associated industries during the development of the project.
- 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 \$28.5 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed development would directly create some 200 full-time, part time and temporary jobs over the development timeline (refer Table 5.2).

Multiplier Effect

- Overall, the subject development is estimated to directly generate 533 jobs, including (refer Table 5.3):
 - Ongoing Employment from Operation: 333 jobs
 - Construction Phase: 200 jobs
 - In addition to this direct employment, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities through ancillary businesses/suppliers that support the development and services, as well as additional consumption expenditure by workers employed within the precinct (spending wages).
 - Again, by using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and adjusting for inflationary and other changes to present, it is estimated that an additional 636 jobs will be created indirectly.
- ii. Overall, some 1,168 jobs are likely to be created both directly and indirectly as a result of the subject development.

TABLE 5.1. ONGOING EMPLOYMENT GENERATING FLOORSPACE

Component	Total Floorspace (sq.m)	Employment Potential		
		Employm. per 1,000 sq.m	Indic. Total Jobs	Net Increase ¹
Retail				
Retail Specialty Shops	400	60.0	24	22
Aged Care & Retirement Living				
Aged Care	10,612	25.0	265	239
Retirement Living	8,048	10.0	80	72
Total	19,060		370	333

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, Cat 6302.0 Average Weekly Earnings, Australia

TABLE 5.2. CONSTRUCTION GENERATED EMPLOYMENT

Metric	Total
Estimated Capital Costs of Construction	
Estimated Capital Costs 2019/20 (\$M)*	\$49.4
Estimated Capital Costs 1996/97 (\$M)	\$28.5
Direct Employment Generation	
Construction Jobs per \$1 million (2019/20)	4.042182
Total Construction Jobs¹	200

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

Employment totals include both full-time and part-time work. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year

TABLE 5.3. ESTIMATED TOTAL EMPLOYMENT GENERATED

Metric / Category	Est. Net Employment Increase ¹	Employment Multiplier Effects	Total Employment
Ongoing Employment from Planned Floorspace			
Retail	22	20	42
Aged Care & Retirement Living	<u>311</u>	<u>295</u>	<u>607</u>
Total	333	316	649
Construction Phase			
Employment Generation	200	320	519
Net Additional Employment	511	636	1,168

Source: SummitCare

1. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase

5.5. Net Community Benefits

- i. It is the conclusion of this report that a substantial net community benefit would result from the development of the proposed SummitCare aged care and retirement living development at Casula. Offsetting insignificant trading impacts on some existing facilities, there are very substantial positive impacts including the following:
 - **Enhanced Range:** significant improvement in the range of facilities that would be available to local residents in terms of services, choice and amenity.
 - **Amenity & Vibrancy:** the proposed development would provide improved amenity, design and aesthetic for the local residents by way of a new and modern development. The revitalisation of the old and under-utilised site also improves enjoyment of private or public areas. Additional



customer flows and vibrancy created through the precinct would positively impact on the other retail and non-retail facilities within the area such as community facilities and Casula Mall.

- **Age in Place:** ageing in place allows residents to maintaining a sense of identity and independence to help ensure a high quality of life. Other benefits retained connectedness to the community, family and social networks, as well as a feeling of familiarity which can assist with mental and physical wellbeing. This type of product is especially important for couples in order to stay together when one partner requires a higher level of care than the other
- **Best in Class:** the project will be a best-in-class facility for the local area and be at the forefront of development within the sector.
- **Retention of Residents & Visitors:** the provision of additional facilities to an undersupplied catchment would result in the retention of residents (and visitors) currently relocating or frequenting other facilities beyond the region.
- **Employment, Income & Economic Activity:** the local community will experience direct impacts and benefits originating from construction and operation of the proposed development, including the creation of some 1,168 jobs, ongoing wages of some \$27.1 million, as well as additional economic activity (revenue, sales etc).
- **Third Place:** the development would provide the local community with additional facilities that would serve as a 'third place', or informal settings where people can meet or be comfortably alone while still engaging socially with the community. This provides additional opportunity for social integration and increases prospects of more seamless interactions between the community, which is important for health and wellbeing.
- **Community Aspirations:** the development also aligns with broader aspirations for the community, responding to core issues and reflecting a new positive vision/narrative for the area in several ways, including challenges presented in the *Community Strategic Plan* for Liverpool:

The development will not only facilitate enhanced social connection '*within a community has become increasingly complex with the numerous demands of everyday life*', but also provides an opportunity to follow the four directions for Liverpool, namely; *creating connection, strengthening and protecting our environment, generating opportunity, and leading through collaboration*.

- ii. It is concluded that the combination of the substantial positive community and economic impacts serve to more than offset the impacts that could be anticipated for a wide-ranging variety of operators throughout the region.



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