

Memorandum

To: [Ben Creighton]
From: [Ian Churchill]
Date: [22 February 2024]
Subject: [Mortdale Plaza NSW – Medical Centre Needs Analysis]

This memorandum provides a high-level needs analysis of the potential for a Medical Centre at Mortdale Plaza, located at 84D Roberts Ave, Mortdale NSW (the subject site), including current and projected population, supply of medical provision and comparison to benchmarks.

Context

The subject site is located approximately 15 kilometres west of the Sydney Central Business District and within the Georges River Local Government Area (LGA). According to the Australian Bureau of Statistics Census, the LGA population was 152,274 in 2021, with key occupations across the region including professionals, clerical & administrative workers, managers & technicians and trades workers.

Mortdale Plaza is a Neighbourhood Shopping Centre constructed in 2015, spanning 3-floors and hosting a Woolworths supermarket, pharmacy, liquor store, gymnasium, child care centre and various speciality offerings.

A Planning Proposal is seeking to amend the Georges River Local Environmental Plan (GRLEP) to permit the development of a Medical Centre within Mortdale Plaza by updating Schedule 1, Cl.5 (2) to include a 600 sq.m Medical Centre.

Catchment and population

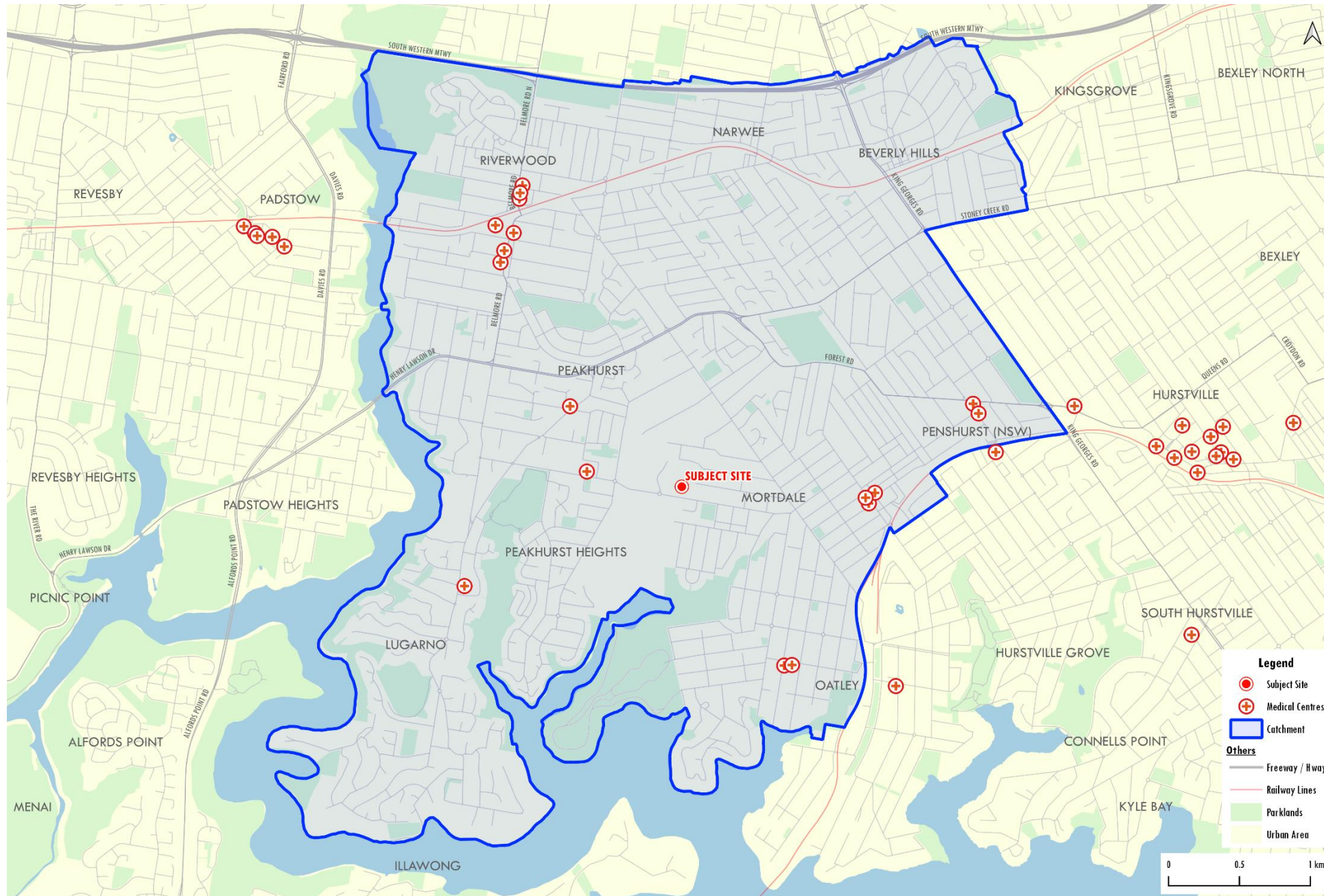
The extent of the catchment is shaped by the interplay of a number of critical factors. These factors include:

- The relative attraction of the subject site, specifically its scale and composition, layout and ambience, car-parking and access/ease of use.
- The proximity and attractiveness of competitive provision. The locations, compositions, quality and scale of competitive facilities all serve to define the extent of the catchment which the subject site is effectively able to serve.
- The available road network and public transport infrastructure, which determine the ease (or difficulty) with which customers are able to access the subject site.
- Physical barriers which are difficult to negotiate and can act as delineating boundaries to the catchment.

The catchment (refer Map 1) is defined to include the subject site and surrounding suburbs of Peakhurst, Peakhurst Heights and Lugarno, along with parts of Riverwood, Penshurst, Beverly Hills, Mortdale, Oatley and Narwee, defined by their Australian Bureau of Statistics Statistical Area 2 (SA2) boundaries. Within the catchment, the population is estimated at 70,000 at the 2021 Census and is expected to grow to 70,161 by 2026 and 76,682 by 2031.

Table 1					
Mortdale Plaza Medical Centre - catchment population, 2021-2036*					
Trade area sector	2021	2023	2026	2031	2036
Population	70,000	70,065	70,161	72,732	76,682
Average annual growth (no.)	136	32	32	514	790
Average annual growth (%)	0.2%	0.0%	0.0%	0.7%	1.1%

*As at June
Source: ABS Census 2021; NSW Department of Planning and Environment 2022; Transport for NSW; Macroplan



**Map 1: Mortdale Plaza
Medical Centre catchment**

Medical Centre supply

Table 2 shows the current and projected supply of General Practitioner (GP) based medical providers within the catchment, sourced from Health Direct. The catchment consists of 17 providers totalling 46 GP's, with one potential future centre found, currently at the development approval stage and with the site listed as for sale.

Table 2 Mortdale Plaza Medical Centre - supply, catchment			
Name	Location		GP's
Asby Medical Centre	Unit 1/84 Penshurst St Penshurst		5
Caritas Medical Centre	1/198 Belmore Rd Riverwood		3
Dr Eloise Fong Family Medical Practice	244 Belmore Rd, Riverwood		1
Dr Ruello Agatino	205 Belmore Rd Riverwood		1
Family Medical Clinic	1/258a Belmore Rd North Riverwood		1
Health and Youth Medical Practice	A/13 Isaac St Peakhurst		1
Healthplus Oatley	Shop 2/121A Mulga Rd Oatley		7
Lawendy General Practice	Unit 3/60-66 Penshurst St Penshurst		1
LHL Oey	14A Park St Peakhurst		1
Lugarno Medical Centre	895 Forest Rd Lugarno		5
Mortdale Heritage Medical Centre	23A Morts Rd Mortdale		2
Mortdale Medical Practice - Dr Monaha Sam	33 Morts Rd Mortdale		1
Mulga Road General Practice	109 Mulga Rd Oatley		2
Revival Medical Centre	264 Belmore Rd Riverwood		2
Riverwood Medical	Shop 2/221-223 Belmore Rd Riverwood		8
Southside Medical Centre	250 Belmore Rd Riverwood		3
Victoria Avenue General Practice	118 Victoria Ave Mortdale		2
Total			46
Potential future supply			
Medical Centre - Development approval DA2020/0227	143 Stoney Creek Road, Beverly Hills		

Source: Health Direct, Macroplan

Benchmarking and potential

Table 3 provides a comparison of the provision of GP's per population in the catchment at 2022 to benchmarks provided by the Department of Health and Aged Care GP Workforce Statistics. Across Australia the benchmark is 115.1 GP's per 100,000 population, compared with 119.2 and 119.0 for New South Wales and metropolitan areas respectively. The catchment has an estimated 2022 population of 70,032 residents and 46 GP's, representing 65.7 GP's per 100,000, significantly below all benchmarks.

Table 3 Mortdale Plaza Medical Centre - GP provision, catchment, 2022				
	Aus. metro.	NSW	Australia	Catchment
Population				70,032
GP's				46
GP's per 100,000 pop.	119.0	119.2	115.1	65.7

Source: Department of Health and Aged Care, Macroplan

Table 4 provides an assessment of the number of GP's required over the forecast period, and an estimate of the over/undersupply based on the Australian metropolitan benchmark in Table 3 and assuming the potential Medical Centre in Table 2 is developed.

The analysis estimates that in 2021 there was an undersupply of 18 GP's within the catchment, and this undersupply is projected to continue over the forecast period.

Table 4 Mortdale Plaza Medical Centre - GP gap analysis, catchment				
	2021	2026	2031	2036
Population	70,000	70,161	72,732	76,682
GP's*	46.0	51.0	51.0	51.0
GP's per 100,000 pop.	65.7	72.7	70.1	66.5
Required GP's**	83.3	83.5	86.7	91.5
Over (+) / under (-) supply	- 17.6	- 10.8	- 16.5	- 25.0

** Assumes 5 GP's at potential future centre **to achieve benchmark provision for metropolitan Australia
Source: Department of Health and Aged Care, Macroplan*

Potential employment outcomes

The proposed Medical Centre will support an increased level of employment both directly onsite and indirectly in the wider economy.

Using industry employment densities and our own view of appropriate benchmarks, an employment density of 31.7 sq.m per worker is estimated for a Medical Centre provision at the subject site, suggesting the proposed 600 sq.m can support 19 Full Time Equivalent (FTE) jobs. With regard to the undersupply of GP's in the catchment, the planned scale of development and employment density outcome, we believe that there is support for 3 – 6 GP's at the subject site.

The direct operational employment will also flow through to indirect employment elsewhere in the local economy that supports onsite employment. The ABS I-O simple employment multipliers indicate that every 1 direct health/medical FTE job will generate another 0.2 indirect supporting FTE jobs (production induced) elsewhere in the economy, including professional, scientific and technical services, transport, postal and warehousing, rental, hiring and real estate services, administrative and support services, manufacturing, and other industries. Using this benchmark, an estimated 4 additional jobs could be created elsewhere in the local economy.

Table 5 summarises the above medical centre job projections, and those of the current Mortdale Plaza retail and supporting non-retail uses, assuming typical vacancy rates seen in comparable centres. There is estimated to be 176 FTE jobs in the current centre, with an increase to 211 jobs (+20%) including the imminent opening of a childcare centre and the proposed medical centre.

Table 5
Mortdale Plaza - estimated employment, retail and supporting non-retail uses*

	GLA	Emp. density**	Onsite jobs
Woolworths	4,170	30	139
Total retail specialties	435	20	22
Crunch Fitness	1,000	67	15
Total current	5,605		176
Medical Centre (p)	600	32	19
Childcare centre (p)	1,280		16
Total proposed	7,485		211

* excludes tenancies estimated as vacant, FTE jobs

** sq.m per worker

Source: ABS, Macroplan

Summary

The key conclusions drawn from this analysis are as follows:

- There is an undersupply of Medical Centres and General Practitioners within the catchment.
- 19 FTE jobs could be created by a Medical Centre development at the subject site.
- 2 – 5 General Practitioners could be supported.
- 4 additional jobs could be created in the local economy.