

TOOWOOMBA
HEALTH SERVICE

TOOWOOMBA REGION HEALTH AND WELLBEING PROFILE

2022

WORLD-CLASS HEALTH AND WELLBEING SERVICE PROVIDER FOR THE DARLING DOWNS

The Toowoomba Region Health Care and Social Assistance industry play a crucial role in supporting the residents' health and well-being in the region and the wider Darling Downs region. The Toowoomba Region has developed and continues to develop health care facilities, expand its medical services, and provide a full spectrum of healthcare services.

The Health Care and Social Assistance industry in the Toowoomba Region is the largest employer and the second largest contributor to Gross Regional Product.

In 2020/21, the industry supported 14,989 jobs or 17.7% of all jobs, well above the Queensland average of 14.4%. In the same year, the industry generated \$1,254 million in value added, accounting for 12.5% of the total region.

The Health Care and Social Assistance industry is one of the fastest growing industry in the Toowoomba Region. With an increase of 4,865 jobs over the past decade, the industry was the largest job creator in Toowoomba. During the same period, the industry value added increased by \$550 million, the 2nd largest growth industry in the region. The rate of growth continues to outperform the state.

INDUSTRY SNAPSHOT

+78%

\$1,254 million



**VALUE
ADDED
2011-2021**

The economic contribution of Health Care and Social Assistance increased by \$551 million over the last 10 years.

+48%

14,989 jobs



**EMPLOYMENT
2011-2021**

Health Care and Social Assistance was the largest employer in the region in 2020.

+45%

1,031 businesses



**BUSINESSES
2015-2021**

Health Care and Social Assistance has experienced the largest growth in business numbers in recent years (+324).



**TOOWOOMBA
REGION**
Rich traditions. Bold ambitions.

IN COVID-19 FRONTLINE SUPPORTING THE COMMUNITY

The Health Care and Social Assistance industry was instrumental in the fight against the COVID-19 pandemic. However, the industry was not immune to the impact of COVID-19. Hospitals experienced a strong increase in employment while other areas like Allied Health Services and Residential Care Services impacted by social distancing requirements. The industry value added and employment dropped, respectively, by 5.7% and 3.4% between the March and June quarters of 2020.

Recovery in the health sector was quick with the sector value added and employment in 2020/21 above the pre-COVID 2018/19 level by, respectively, 4.2% and 1.4%. COVID-19 has also led to a shift in the way health services are provided with many providers offering telehealth services.

TOOWOOMBA'S HEALTH AND WELLBEING INDUSTRY IN 2020/21

EMPLOYMENT



14,989
2020/21

10,124
2010/11

Largest growth out of all industries.

VALUE ADDED



\$1,254M
Largest sector

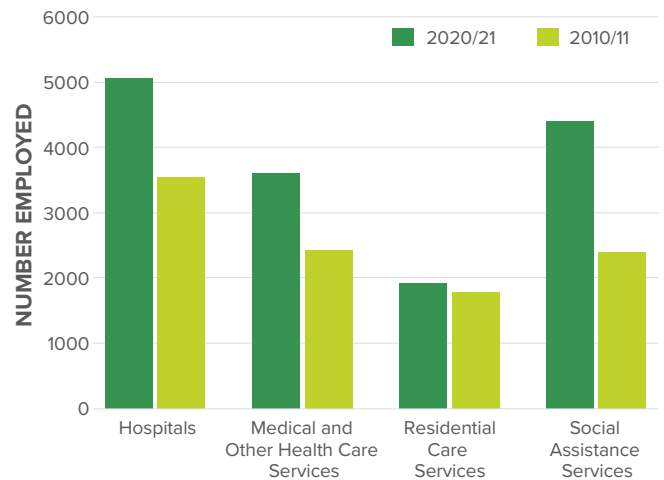
+\$551M
2nd largest growth sector since 2011

PROVIDING A FULL SPECTRUM OF SERVICES

The Health Care and Social Assistance industry provide a wide range of services. In 2020/21, the largest sub-sector of the industry is Hospitals, employing 5,056 workers, followed by Social Assistance Service with 4,405 workers. These sub-sectors experienced significant growth over the last decade, growing by 1,515 people and 2,015 people respectively. In 2020/21, the two sectors represented 63% of the total workers in the Health Care and Social Assistance Industry.

TOOWOOMBA REGION'S HEALTH CARE PROVIDER ROLE SUPPORTS LARGE AMOUNT OF JOBS

HEALTH CARE AND SOCIAL ASSISTANCE EMPLOYMENT, TOOWOOMBA



SOURCE: National Institute of Economic and Industry Research (NIEIR) 2022. Compiled and presented by .id (informed decisions).

RICH AND DIVERSE INFRASTRUCTURE

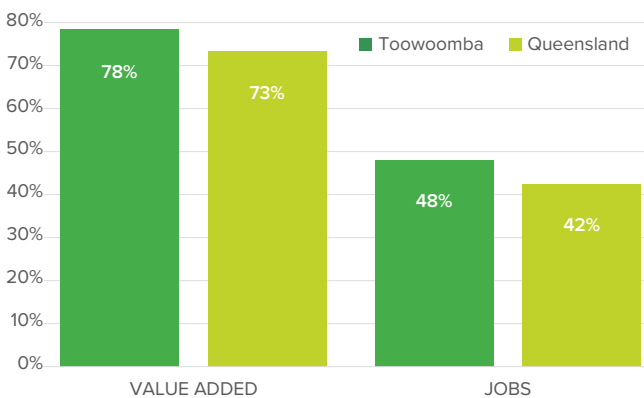
The Health Care and Social Assistance industry in Toowoomba offers a diverse range of world-class health care services for residents in the wider region. The Toowoomba Region is home to eight hospitals, including three major facilities:

- St Vincent's Private Hospital Toowoomba
- Toowoomba Hospital
- St Andrew's Toowoomba Hospital.

TSBE Health links businesses with opportunities in the growing health industry by boosting the Toowoomba Region's health profile and promoting the liveability and services in the region. TSBE Health will deliver the inaugural Downs Health Conference in 2020 and the group have also established the Workplace Wellness program, which will deliver economic benefits to the health sector as well as improved health to employees across the region. In addition, TSBE Health are delivering Westfund's Let's Shape Up Darling Downs, a new initiative designed to promote wellness in the workplace and provide sustainable outcomes for businesses.

Toowoomba also hosts the Darling Downs and West Moreton Primary Health Network (PHN), further

GROWING SPECIALISATION IN HEALTH CARE CHANGE IN JOBS AND VALUE ADDED, HEALTH CARE AND SOCIAL ASSISTANCE, %, 2010-2020



SOURCE: National Institute of Economic and Industry Research (NIEIR) 2022. Compiled and presented by .id (informed decisions).

boosting its role as the regional health hub for the region. PHN partners with community organisations, health care providers, hospital and health services, and state and federal governments to improve primary health care services in our communities.

HEALTH EDUCATION AND TRAINING HUB

The sector also supports the region's training and skills development needs. Other major health education facilities and infrastructure includes:

- University of Queensland's (UQ) Rural Clinical School. Program delivery and operations in Toowoomba are based at UQ's Teaching and Learning Centre, adjacent to the Toowoomba Hospital. The centre includes a clinical skills laboratory and clinical simulation facilities.
- Queensland Rural Medical Education (QRME) promotes and advances rural and remote health practice through training, research and collaboration with government and strategic health agencies.
- Southern Queensland Rural Health (SQRH) is a University Department of Rural Health, a Commonwealth-funded collaboration between UQ, University of Southern Queensland, Darling Downs Health and South West Hospital and Health Service. SQRH has been funded to deliver effective rural training experiences for allied health, nursing and midwifery students.
- General Practice Training Queensland (GPTQ) deliver the Australian Government funded Australian General Practice Training vocational training program for GP registrars to achieve recognition under the medical specialty of general practice. Toowoomba is the only one of three service centres in the South East Queensland region, located outside of Brisbane.
- Fairholme College have partnered with Mater Hospital, Brisbane to deliver Certificate III in Health Services Assistance to students through their new on-campus Health Hub.

MAJOR INVESTMENT

There has been substantial investment into the Health and Wellbeing industry, with over \$217 million of health and aged care related building approvals in the last five years to 2020/21. All three major hospitals are investing in infrastructures and expanding their service offer. Some of the recent health and wellbeing related investment includes:

- The State Government announced in the 2022 - 2023 State Budget funding of \$21.9 million in 2022-23 out of a \$42 million total spend for the construction of a 2 theatre day surgery unit at the Baillie Henderson Hospital Campus. Part of the \$49 million total spend to redevelop the Toowoomba Hospital across both campuses.

- Darling Downs Hospital and Health Service is planning the development of a new public health precinct to be built on the 74-hectare Baillie Henderson hospital site. The Masterplan and Feasibility Study have been lodged with the State Government in March 2021. The total project cost is estimated at between \$1.8 billion.
- St Vincent's Private Hospital's new emergency and radiology departments are set to open in July 2021. With the estimated cost of \$15 million, the project will also house acute treatment, ambulatory care services and telehealth services in the new building, along with new medical imaging facilities.
- A new \$11.9 million upgrade to the health facility at the Oakey Army Aviation Base will provide primary care, mental health and rehabilitation, in-patient services, pharmacy, physiotherapy, dental and airfield emergency response services.
- A new \$8 million 29-bed Mental Health hospital operated by Mi-Mind Centre.
- A new 2,500 square meter day hospital and a set of medical suites on Goggs St, Toowoomba City.

In addition, some of the recent health and wellbeing education related investment includes:

- TAFE Toowoomba have completed the second-stage refurbishment of their health centre and is training students in nursing, counselling, mental health, youth work and aged care support. The health centre is part of a \$7 million campus upgrade.
- A new \$1.3 million clinical training facility was opened in late 2019 at Baillie Henderson Hospital and will be operated by Southern Queensland Rural Health.

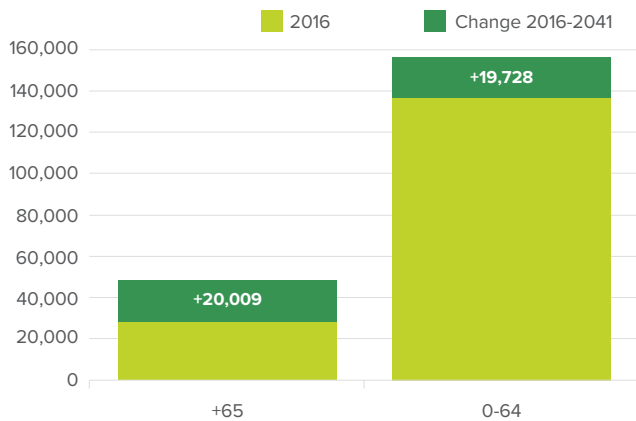
RETIREMENT HOTSPOT

Over the last decade, the Toowoomba Region has established itself as a retirement hotspot. The region provides retirees with an exceptional choice of facility type and world-class health care services. Australia's ageing population combined with a strong migration into Regional Queensland from New South Wales and Victoria post COVID-19 is expected to continue growth in the Health and Wellbeing industry.



The number of persons aged 65 and above in the Toowoomba Region is projected to increase by around 20,000 people between 2016 and 2041. The ageing population will increase the demand placed on Health and Wellbeing services and will provide opportunities for the region to build on its already strong foundations as a major health hub.

AGEING OF THE POPULATION
PROJECTED POPULATION CHANGE BY AGE GROUP,
TOOWOOMBA REGION

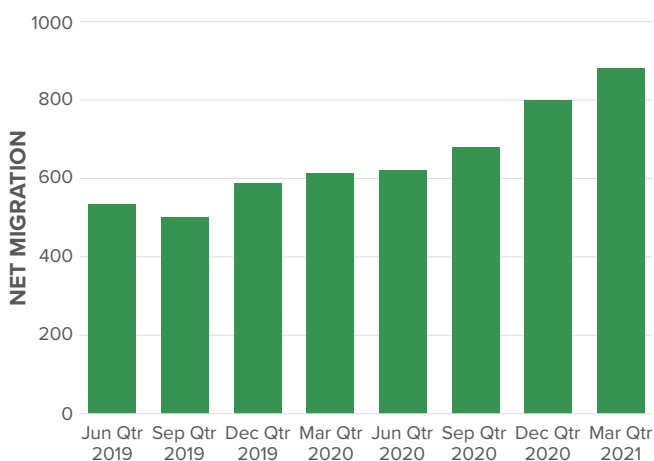


SOURCE: Queensland Government population projections, 2018 edition. Compiled and presented by .id (informed decisions).

COVID-19 has elevated Toowoomba’s opportunity to attract older residents into the region. The inter-state migration into Regional Queensland increased significantly post COVID-19. During June to December Quarters 2020, the net internal migration of the number of persons aged 65 and above was 2,000 people, or 30% more than during the same quarter in 2019 pre COVID-19. With a wealth of retirement facility and a low cost of living, Toowoomba is well placed to leverage this opportunity and capture a share of older inter-state migrants into Regional Queensland, subsequently increasing demand for health and wellbeing services.

SURGE IN RETIREES MIGRATION INTO REGIONAL QUEENSLAND POST COVID-19

QUARTERLY REGIONAL INTERNAL MIGRATION, 65 YEARS AND OVER, REST OF QUEENSLAND



SOURCE: ABS Regional internal migration estimates, 2022. Compiled and presented by .id (informed decisions).



Image courtesy of Feather & Lawry

The Health and Wellbeing industry in Toowoomba is continuously developing facilities with many completed recently, under construction and planning. The recent residential care related investment includes:

- Brodribb Home expansion, including 15 new rental units in September 2019.
- Construction of a \$67 million expansion of Carinity Brownsholme retirement village in Highfields is scheduled to finish mid 2021. Upon completion, the village will feature an additional 96-suite aged care facility.
- The Ninth Middle Ridge, a \$30 million, 85-unit retirement village adjacent to the Toowoomba Golf Club is being developed by Aura Holdings. Construction of the ‘The Ninth’ Middle Ridge is due for completion by September 2021.
- A new \$12 million retirement village with 42 two and three-bedroom villas by the Oak Tree Group in Highfields.
- Palm Lake Care opened the latest Aged Caring Community in 2020. Situated next to Toowoomba Palm Lake Resort, the facility features five small community wings and a specialised Memory Support Unit.

SOURCES:

Economic and employment data - National Institute of Economic and Industry Research (NIEIR) ©2022
 Building approvals - ABS 8731.0 - Building Approvals, Australia, March 2022
 Businesses – Australian Business Register – April 2022
 Population projections - Queensland Government population projections, 2018 edition
 2020 TSBE Development Status Report – Toowoomba and Surat Basin Enterprise, Mar 2020

