



CAIRNS REGIONAL COUNCIL

# HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY

2021/22



# CONTENTS

- 3 INDUSTRY SNAPSHOT
- 4 SIZE AND COMPOSITION
- 5 GROWTH TRENDS
- 6 COMPETITIVE ANALYSIS
- 7 WORKFORCE PROFILE
- 8 SKILLS AND EDUCATION
- 9 PRECINCTS AND KEY PLAYERS
- 10 TRENDS AND MAJOR PROJECTS
- 11 SWOT ANALYSIS

# Industry Snapshot - 2022



**\$1,822M**

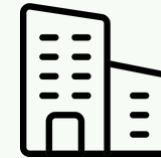
Output / Total Sales



**15,973**

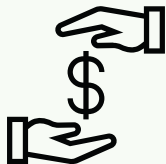
Local Jobs

*18.8% of total local jobs*



**1,124**

Local Businesses



**\$1,307M**

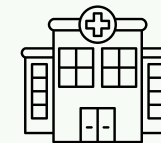
Gross Value Added

*15.3% of total industry value added*

**5YR  
ANNUAL  
GROWTH**



## KEY SUB-INDUSTRIES



Hospitals

**\$498M Value Added**

**5,603 Jobs**



Social Assistance Services

**\$382M Value Added**

**4,428 Jobs**

Sources: NIEIR, 2023; ABS, 2022

# Industry Size and Composition



**Output/Sales**



**Value Added**



**Employment**

**Direct**

**\$1,822M**

**\$1,307M**

**15,973**

**Indirect/Flow-on Impacts**

**Industrial**

**\$440M**

**\$217M**

**1,870**

**+**

**+**

**+**

**Consumption**

**\$1,214M**

**\$594M**

**6,212**

**Total Impact**

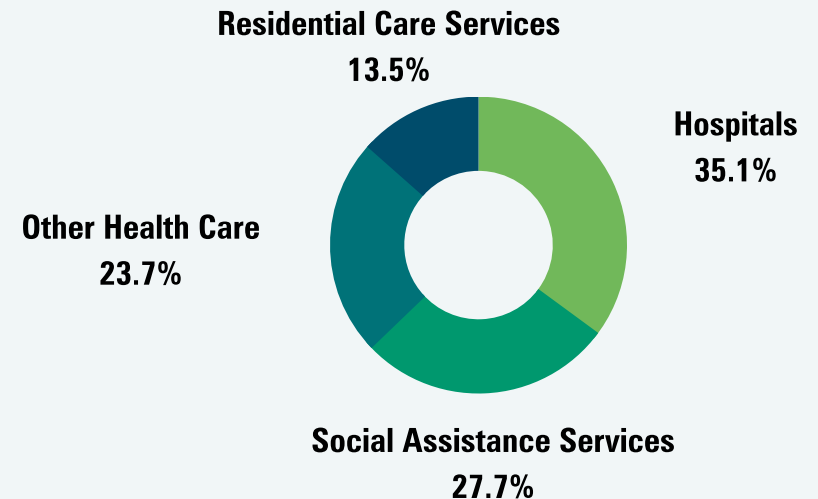
**\$3,476M**

**\$2,118M**

**24,055**

In 2021/22, the Health Care and Social Assistance Industry in Cairns was estimated to have generated \$1,307M in direct plus an additional \$811M in indirect impacts for a total contribution of \$2,118M in Value Added. The industry supported 15,973 jobs directly and an additional 8,082 in indirect employment. The largest sub-industry for direct employment was estimated to be Hospitals with 35.1% of the total sector's employment.

## Share of Total Sector Employment, 2021/22

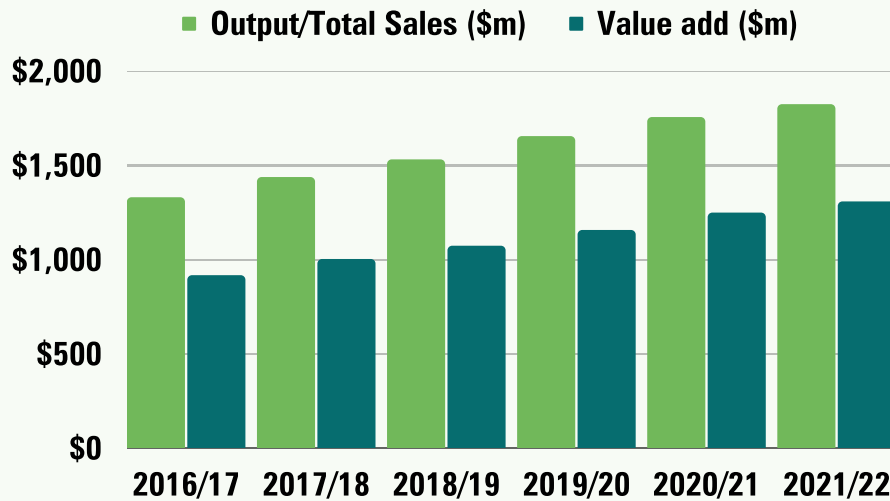


Sources: NIEIR, 2022

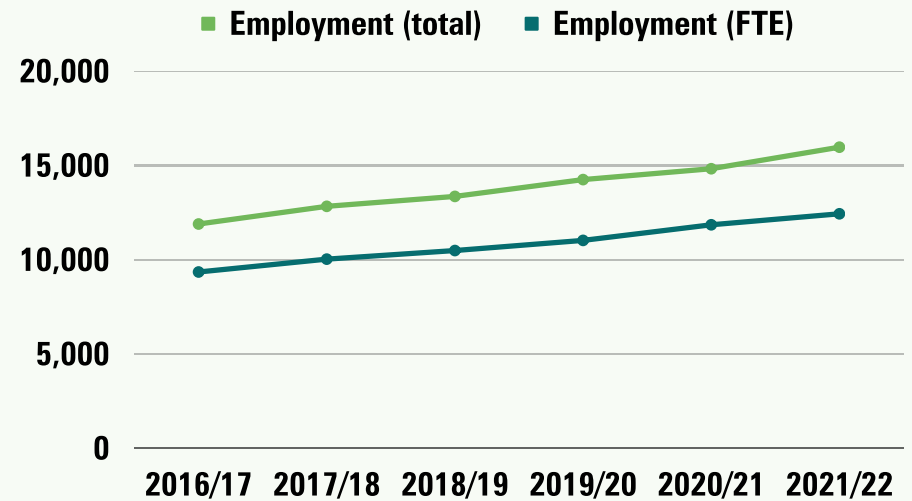
# GROWTH TRENDS

In 2021/22, there were an estimated 15,973 employees working in the Health Care and Social Assistance Industry in Cairns and 12,439 full-time equivalents. The industry generated \$1.3B in Value Added, or \$81,849 per employee (\$105,097/FTE). Growth in the industry has averaged 6.1% p.a. for employment over the last five years and 7.4% p.a. for value added, both above the state average.

### Economic Value, Cairns Region, Financial Year



### Average Employment, Cairns Region, Financial Year



**5 YEAR  
AVERAGE  
ANNUAL  
INDUSTRY  
GROWTH**

**6.5%**

**Output/Sales**

5.9% p.a.

**7.4%**

**Value Added**

6.4% p.a.

**5 YEAR  
AVERAGE  
ANNUAL  
INDUSTRY  
GROWTH**

**6.1%**

**Employment**

5.4% p.a.

**5.9%**

**FTEs**

5.3% p.a.

Sources: NIEIR, 2022

# COMPETITIVE ANALYSIS



Cairns Hospital is the largest major referral hospital in FNQ and is undergoing a multi-million dollar expansion. Cairns Private Hospital is run by Ramsay Health Care, one of the largest and most respected private hospital operators in the country.



Cairns is attractive to new workers offering lifestyle advantages including great weather, major city facilities and access to the Great Barrier Reef. Workers also enjoy above state average median incomes.

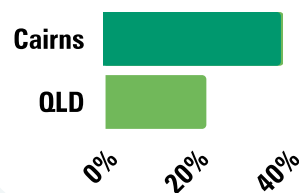


James Cook University specialises in Tropical Health and Medicine and is developing a new health and innovation precinct in Cairns. CQUniversity and TAFE Queensland also provide health and nursing courses at their Cairns campuses.

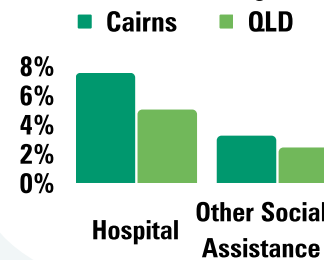


Cairns 70+ year old population has grown by 39% in the last five years, far above the state average (22%).

**Growth in 70+ residents 2016 to 2021**



Share of local employment in hospitals and other social assistance (aged/disability care) is above the state average.



# WORKFORCE PROFILE

## KEY CHARACTERISTICS OF THE HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY, 2021 - CAIRNS REGION

The profile of workers in the Health Care and Social Assistance Industry in Cairns was similar to that for the state as a whole in 2021 with a median age of 42, 77% being female and 35% born overseas.

Nearly half the workforce was degree educated and working in professional or managerial roles.

In 2021, the FTE median income of the local workforce was higher than the state median, likely due to a higher % of professionals.



**42 years**

**Median Age**

QLD - 42 years



**\$80,088**

**Median Income FTE**

QLD - \$78,373



**23%**

**Male**

QLD - 22%/78%



**77%**

**Female**



**57%**

**Full Time**

QLD - 53%



**35%**

**Born Overseas**

QLD - 34%



**7%**

**Owner Manager**

QLD - 9%



**46%**

**Degree or Above**

QLD - 47%

**37%**

**Certificate III to Advanced Diploma**

QLD - 35%



**46%**

**Professionals/Managers**

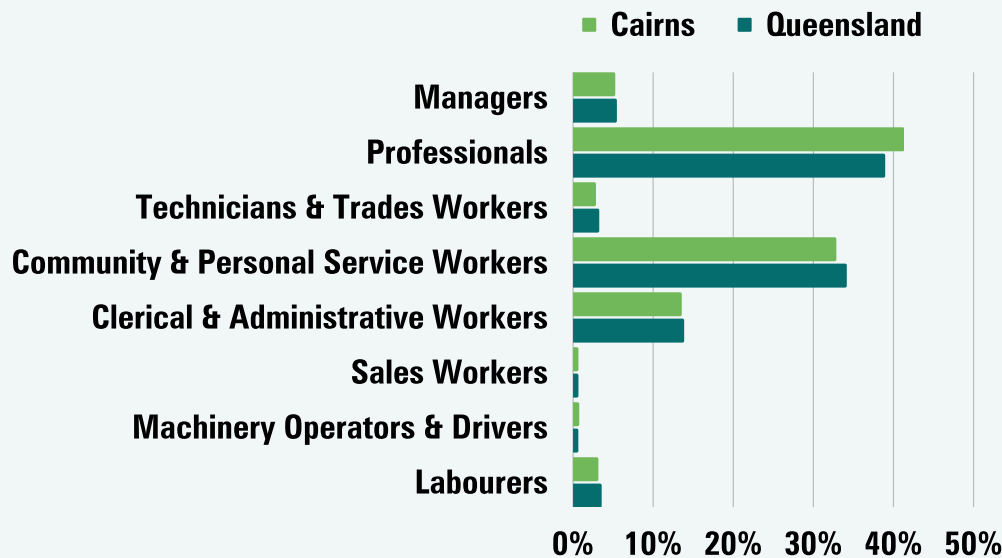
QLD - 44%

Sources: ABS Census of Population and Housing, 2022

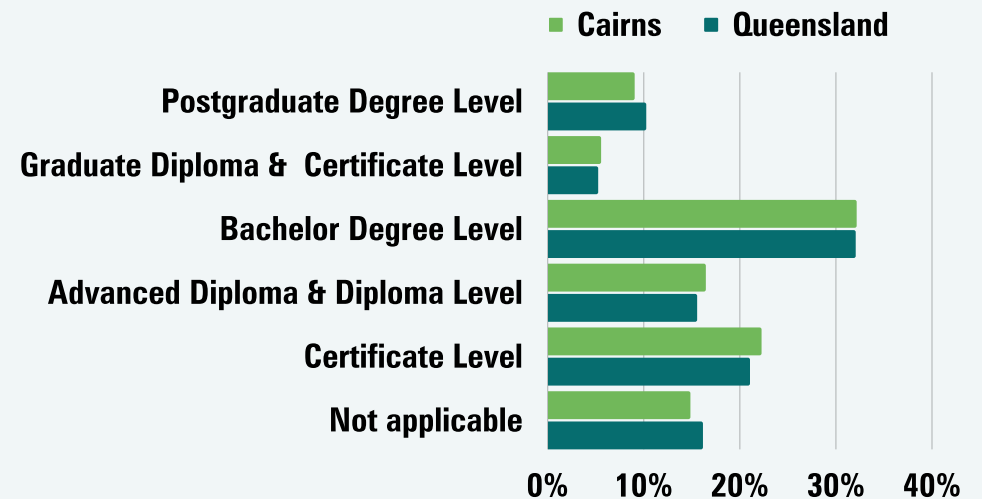
# EDUCATION & SKILLS

The Health Care and Social Assistance Industry in Cairns had a higher share of workers in professional occupations in 2021 (41%) compared to the QLD average (39%). The top occupations were registered nurses and aged/disabled carers. The industry had a slightly higher share of qualified workers (85%) than the QLD average (84%), but a slightly lower share with post-graduate degree level qualifications (9% vs 10% for QLD).

### Local Workforce Occupations, 2021



### Local Workforce Qualifications, 2021



#### Top Occupations

- Registered Nurses
- Aged and Disabled Carers
- Nursing Support and Personal Care Workers
- Child Carers

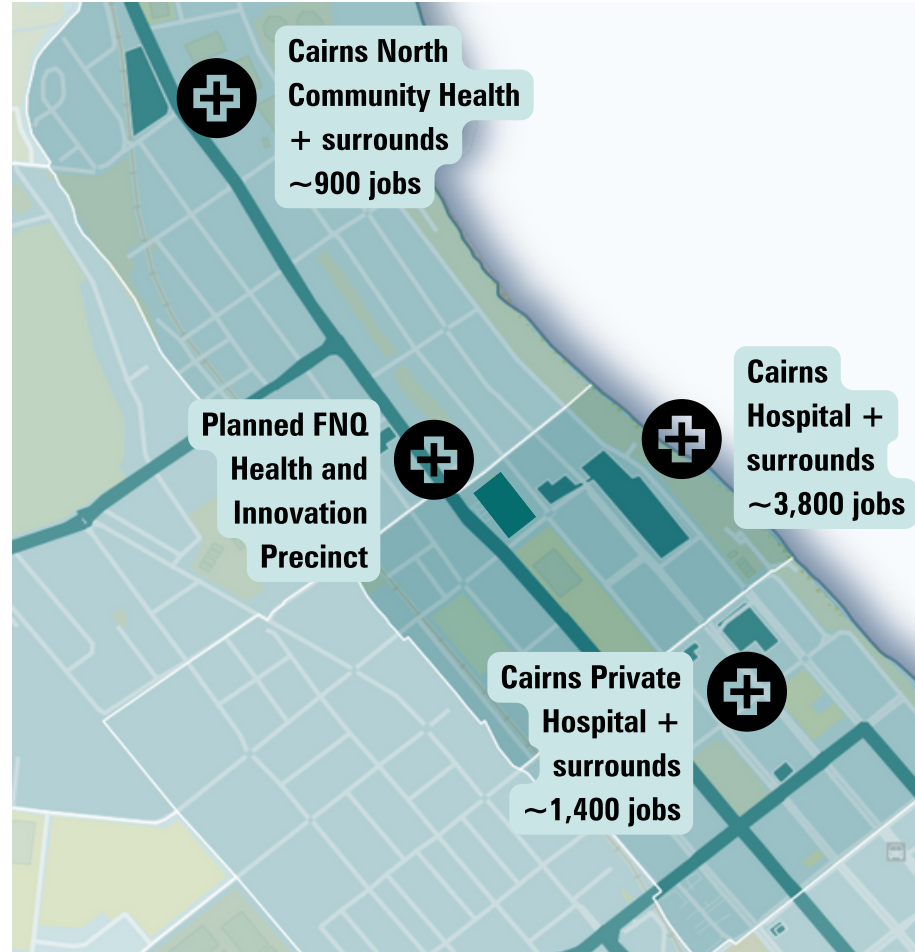
#### Top Study Fields

- General Nursing
- General Medicine
- Business and Management
- Children's Services

Sources: ABS Census of Population and Housing, 2022



# Main employment precincts



## Estimated Industry Jobs, 2021



# Key employers

- Bolton Clarke Farnorha
- BUPA Aged Care Cairns
- Cairns Hospital - the largest major referral hospital in Far North Queensland
- Cairns North Community Health
- Cairns Private Hospital - part of Ramsey Health Care
- Far North Queensland Hospital Foundation
- HCA Home Cairns - Aged Care & NDIS Provider
- Mercy Health - Mercy Place Cairns Aged Care
- Spinal Life Healthy Living Centre

Sources: ABS Census of Population and Housing, 2022

# PROJECTS & TRENDS SHAPING THE FUTURE



## Major expansion of Cairns Hospital

The QLD Government has budgeted \$250M for the delivery of 141 new beds at Cairns Hospital by 2026. This is in addition to the \$24.7M expansion of the Hospital's Emergency Department already under construction.



## New Cairns Mental Health Unit

Construction work is underway for a new \$70M, 53-bed Cairns mental health unit as part of an ongoing expansion of Cairns Hospital. The facility is set to be operational early in 2024.



## FNQ Health and Innovation Precinct

As part of Cairns Hospital becoming a university hospital, progress is underway to establish an innovation precinct next to the hospital that will house the Cairns Health & Innovation Centre, and the Cairns Tropical Enterprise Centre.



## Cairns Tropical Enterprise Centre

James Cook University has received \$60M in funding to establish a technology-led facility featuring a clinical school, research, and innovation activities. This will create a multi-disciplinary centre for applied technology and enterprise with a focus on health.

# SWOT Analysis

## STRENGTHS

- Large-scale and expanding major public and private hospitals with supporting suburban health centres
- Strong education facilities with established pathways to careers in health
- Lifestyle attractors spurring growth in older residents with health needs and also attractive to skilled labour
- Established research expertise in tropical health issues
- Strong networks and demonstrated advantage in disability services



## WEAKNESSES

- Distance to other major population bases can limit market growth
- Existing capacity constraints at Cairns Hospital
- Employment in residential care below state average
- Low or negative growth in young children in the region has seen employment in childcare plateau



## THREATS

- Labour constraints to potentially continue for sometime, especially for a sector overly reliant on a migrant work base
- Aged care reforms will require providers to be more accountable and see increased need for qualified workforce



## OPPORTUNITIES

- Major expansion of Cairns Hospital will generate new employment and complementary allied health demand
- Planned health and innovation precinct can improve applied science and research as well as boosting commercialisation of new health related enterprises
- JCU's Cairns Medical School to enable students to complete the entirety of their medical degree in Cairns
- Improved NBN and 5G technology allows for expansion of digital health services





For more economic data on the  
Cairns Region, visit [economy.id](http://economy.id)

