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**Playford Health Precinct**  
A vision in the making

# Executive summary

## Playford Health Precinct – the vision

### Leveraging the Lyell McEwin Hospital

The City of Playford recognises that there is a unique opportunity to develop the area surrounding the Lyell McEwin Hospital (LMH) into an integrated world-class health precinct – to be known as the Playford Health Precinct. Based around the LMH – one of Adelaide’s major tertiary public hospitals, and the centrepiece of metropolitan Adelaide’s northern health network – the vision for this precinct is to build upon the \$336 million investment made by the South Australian Government in the LMH over the last 15 years.

Located at the heart of Adelaide’s northern suburbs, the Playford Health Precinct is uniquely placed for development and expansion.

### A new model for economic growth

Future investment at the LMH site has the potential to generate further economic growth, creating new jobs and skilled employment opportunities in the health, aged-care, and social assistance sectors for residents of Adelaide’s northern suburbs.

The City of Playford, along with Adelaide’s other northern most areas - City of Salisbury, City of Tea Tree Gully, and Town of Gawler - are home to 360,000 people or about 21 per cent of South Australia’s population. This area is projected to grow to 454,000 people by 2036. This region has recently undergone significant economic structural change with the demise of the automotive manufacturing industry in Australia. Where manufacturing once dominated the economic landscape, industries such as defence, health, retail, and education now provide a breadth of diversity in Adelaide’s north.

Based on the Innovation Districts model that has proved successful both overseas and interstate, the Playford Health Precinct represents a place for leading-edge health and medical institutions, education and training institutions, and private companies to come together, cluster and connect.

The Playford Health Precinct is an opportunity to continue the northern suburbs economic transition, and to expand the breadth of the area’s industrial diversity.

### Health gateway

Geographically, the Playford Health Precinct is strategically situated to serve as a health gateway to the regional population well beyond Adelaide’s northern suburbs.

Situated along key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia, the Playford Health Precinct and the LMH is the nearest full-service tertiary public hospital for an additional 160,000 people living across country South Australia.

These areas include:

- Port Pirie in the north
- Kadina-Moonta-Wallaroo on the Yorke Peninsula
- the Riverland towns of Berri, Loxton and Renmark
- the Barossa and Clare Valley wine and tourism regions.

Currently, these areas have limited public health and hospital services, as well as a complete absence of adequate private hospital services.

The Playford Health Precinct sits as a health gateway, strategically placed to take advantage of the increasing health needs of a large and growing regional population.

### A future leader in health services

Local and national trends mean that the future of health services is rapidly evolving and that there are numerous potential opportunities to integrate medical services and health care with education, research, as well as commercial development.

There is an opportunity for the Playford Health Precinct to be recognised as a leader in the treatment and delivery of health services by developing a specialist focus concentrated around:

- **Chronic diseases associated with socioeconomic disadvantage** – diabetes, obesity, and cardiovascular disease
- **Acute care services** – urgent medical and surgical treatment and short-term care
- **Conditions and illnesses associated with ageing** – gerontology and geriatric medicine
- **Longer term health care and recovery services** – aged and disability care
- **Allied health and social assistance services.**

The Playford Health Precinct is well positioned to embrace shifting local and national trends, and to develop into an integrated world-class health precinct.

### What needs to be done?

Continued government commitment and investment in the LMH has the potential to sustain and grow private-sector and non-government interest and investment around the health precinct.

Leveraging the State Government’s recent \$336 million investment to expand the LMH, there are opportunities for:

- **Expanded and improved health, medical and care services** – including private hospital services, allied health and additional aged and disability care services.
- **University education, training and research facilities**
- **Improved retail, hospitality, accommodation and transport offerings.**

### Developing the vision

This document represents an important step in the journey to establishing the Playford Health Precinct.

For the precinct to succeed, however, more work is needed. While the City of Playford is providing the vision and acting as a catalyst for the precinct, it cannot achieve this alone. It will likely require close collaboration and support from the South Australian and Commonwealth Governments, engagement from university institutions, and, most importantly, private-sector investment.

Realising the full potential of the precinct ecosystem will require dedication, strong leadership, as well as appropriate planning and coordination. This needs to be built around:

- a strong evidence base gained from detailed and rigorous economic analyses
- an appropriate governance structure to build collaborative relationships and to take a coordinated view of the development and investment in the site.

The City of Playford is committed to acting as a catalyst to facilitate public and private investment to achieve this goal. Playford is looking to bring together key stakeholders and interested parties to help support and facilitate the development of the precinct.

Together, in a precinct environment, the sum of these parts will make for something much greater.

# Scale of the opportunity

## The value proposition of the site

### Northern Adelaide

#### Population

- Home to 21% of SA's population (360,000 people)
- Growing rapidly**
  - Experienced the largest population growth in SA (added 24,000 people between 2011 & 2016)
  - Projected to grow to 454,000 by 2036
- Youthful**
  - One-third of the population is aged 0-24 years
- Future ageing**
  - Population is expected to age faster than the state average (30% of residents expected to be aged 55+ in 2036)

#### Health services

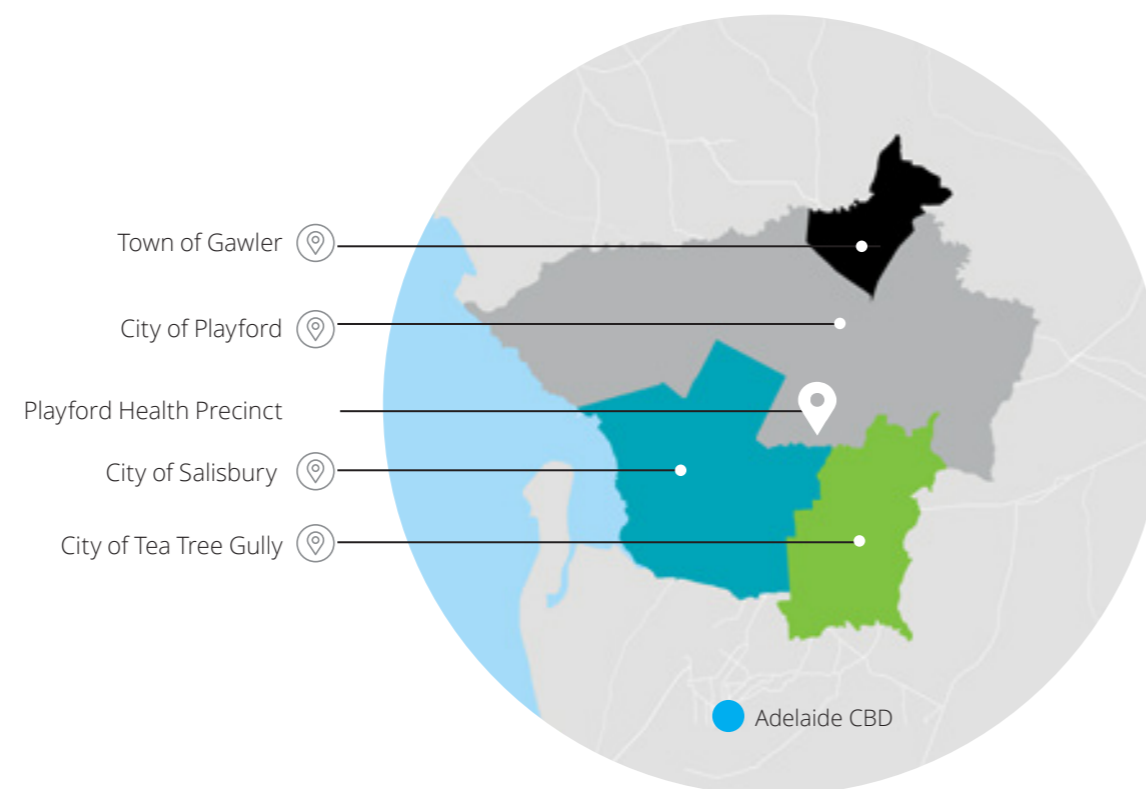
- Home to one of SA's largest public hospitals, the Lyell McEwin
- Limited availability of health services locally**
  - 39% of residents travel outside the region for health services
- Limited private hospital services**
  - One small private hospital locally (<50 beds)
  - 42% of residents have private health cover

#### Economic growth

- Home to 14,500 health jobs (15% of employment)
- Diverse economy**
  - 8,750 additional jobs created in health, education, retail and defence industries between 2011 & 2016
- Proximity to SA's Defence industry**
  - 6,400 people work at Edinburgh Defence Precinct (61% live in region)
- Future investment**
  - There is \$394m of planned investments into the City of Playford over the next 15-years

#### Health and social indicators

- Health outcomes**
  - 17% of adults smoke
  - 33% of adults are obese
  - 64% of adults are at risk of developing a chronic disease
- Incidence of welfare dependency**
  - 11% of people hold a Health Care Card
  - 7% of people are on a Disability Support Pension



### Greater North

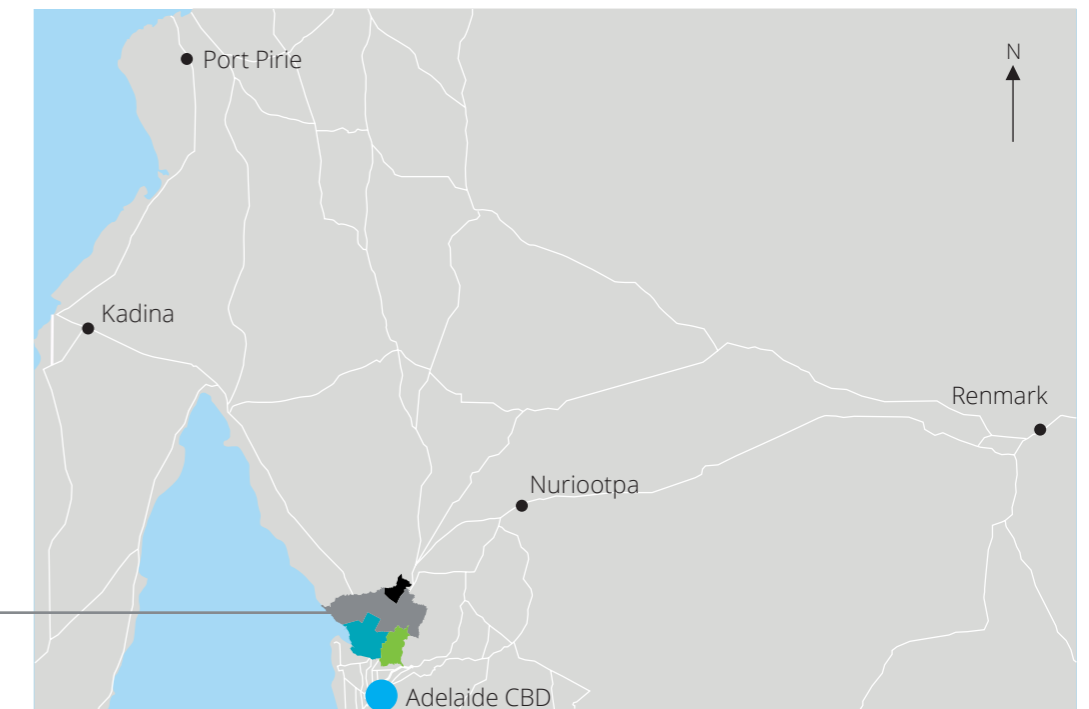
#### Population

- Home to another 162,000 people (10% of SA's pop.)
- Greying population**
  - The region is popular with older people and retirees
- Modest travel times**
  - Within 2.3 hours drive of the Playford Health Precinct (adequate travel time from many regional towns)

#### Health Gateway

- Limited private health services**
  - No private hospital services, despite 34% of people having private health cover
- Health outcomes**
  - 19% of adults smoke
  - 37% of adults are obese
  - 67% of adults are at risk of developing a chronic disease
  - 17% of adults drink to excess

Figure 1: Key regions that a Playford Health Precinct could service



**Context**

**A unique opportunity**

The City of Playford recognises that there is a unique opportunity to develop the area surrounding the Lyell McEwin Hospital (LMH) into an integrated world-class health precinct – to be known as the [Playford Health Precinct](#).

Located at the heart of Adelaide’s northern suburbs – some 20-30 kilometres from Adelaide’s CBD – the Playford Health Precinct is uniquely placed for development and expansion. The strength of the health services delivered at the LMH, combined with its proximity to a large and growing population, as well as its relatively central position within the urban landscape, are all contributing factors that enhance the value proposition of the Playford Health Precinct.

There is a unique opportunity for the Playford Health Precinct to be recognised as a leader in the treatment and delivery of health services.



**Playford’s commitment**

The City of Playford is committed to acting as a catalyst to facilitate public and private investment to achieve its vision, and is looking to bring together key stakeholders and interested parties to help support and facilitate the development of the precinct.

**Building on a track-record of investment**

The vision for this precinct is to build upon the continued success of the existing LMH, which has seen more than \$336 million in government investment over the last 15 years to expand its facilities and health offerings. Continued government commitment and investment in the LMH has the potential to sustain and grow private-sector and non-government interest and investment around the health precinct.

**Proximity to South Australia’s defence industry**

Located some 7 kilometres from the Edinburgh Defence Precinct, the epicentre of South Australia’s growing defence industry. The close proximity of the health precinct presents opportunities for knowledge spillovers involving specialist health research focusing on defence, and to provide health and medical services specific to these workers and their families.

**Positioned as a ‘health gateway’**

Geographically, the health precinct sits as a health gateway, strategically situated to serve the increasing health needs of a large regional population. The health precinct sits along key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia. Currently, these areas have limited public health and hospital services, as well as a complete absence of adequate private hospital services.

**The next step in a long and industrious history**

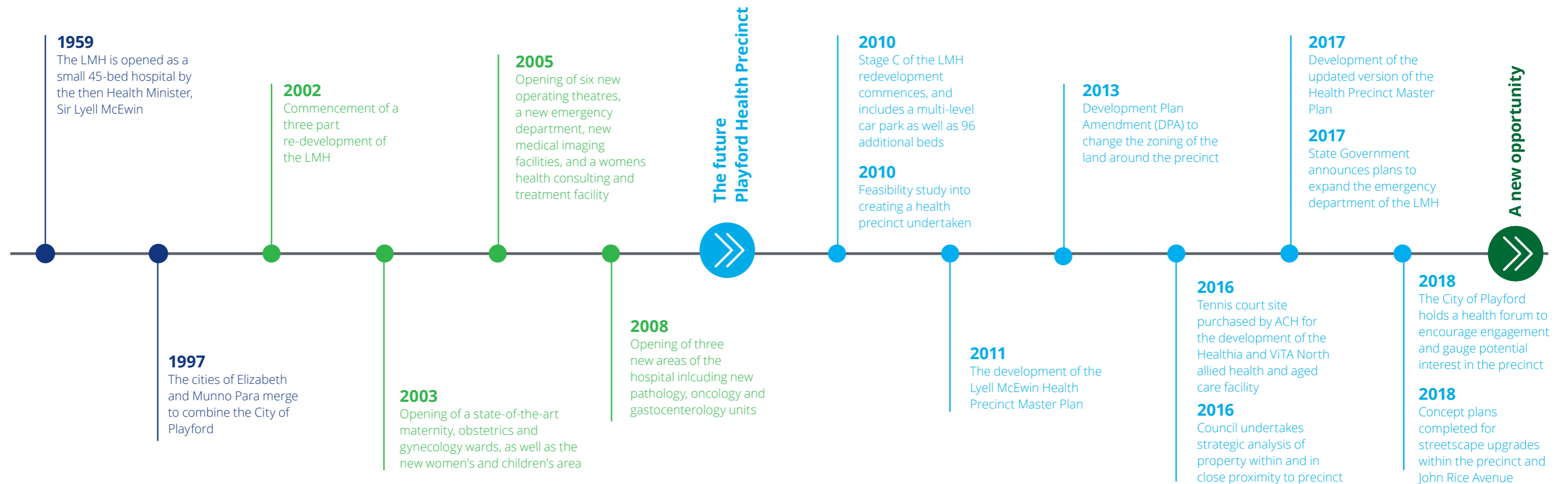
Playford, along with Adelaide’s other northern most areas – the City of Salisbury, the City of Tea Tree Gully, and the Town of Gawler – have a proud and industrious history built on the hard work of generations of migrants. At the forefront of Australia’s golden age of manufacturing following World War II, these areas were defined for many years by the automotive manufacturing industry. Manufacturing sustained the economic welfare of the region for three generations, and provided good jobs for many new Australians.

Since 2006, however, the economic composition of Adelaide’s northern suburbs has undergone significant structural change. Following the decline of Australia’s automotive manufacturing industry, the area is now in a period of economic renewal.

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## A short history of the Lyell McEwin Hospital



LMH in 1961



LMH in 1968





LMH in 1970



LMH in 2018



-  The Lyell McEwin Hospital
-  ACH Group Healthia and ViTA North aged care and allied health development
-  Residential land retained for long term hospital expansion
-  Edinburgh Defence Precinct
-  Elizabeth Vale Shopping Centre
-  Industrial land zoned for future health facilities
-  Fluid Solar building

# The Playford Health Precinct

## Current and future economic uses

### About

Located in the heart of Adelaide's northern suburbs, the Playford Health Precinct involves the clustering and expansion of the health and medical facilities currently located around the LMH. Anticipated to cover 198,000m<sup>2</sup> of the surrounding area, it will also encompass allied health services and retail services, as well as drive the urban revitalisation of the area.

1. The current LMH site
2. The Elizabeth Vale Shopping Centre – a 17,000m<sup>2</sup> retail precinct
3. The Fluid Solar building – housing offices and consulting rooms
4. The former Bicentennial tennis court site – this site was recently sold by the City of Playford to the ACH Group to develop an \$80 million aged-care and allied health facility
5. Rezoned land – current privately held residential land rezoned for commercial development
6. Residential land - currently privately held (33 allotments) retained for long term hospital expansion
7. Vacant land – two 'greenfield' sites, currently owned by the City of Playford, intended for future development related to health and hospital services or tertiary education
8. Industrial land – potential area for future development related to health and medical education and research, or health and medical manufacturing



# The Lyell McEwin Hospital

Located approximately 24 kilometres north of Adelaide's CBD and 4 kilometres from the Elizabeth city centre, the Lyell McEwin, or 'Lyell Mac' as it is affectionately known by locals, is one of three major public tertiary hospitals located across metropolitan Adelaide.

Founded as a small country hospital in 1959, the LMH is now a global health facility providing services to over 65,000 patients a year.<sup>1</sup>

#### A full-service hospital

The LMH provides a 24/7 emergency department as well as twenty-four hours a day access to orthopaedic surgery. The hospital also hosts a number of locally focused clinical research programs aimed at tackling chronic diseases prevalent in the local community. These include research in areas such as aged care, diabetes, heart disease and speech therapy. It is also the premier maternity hospital for the north of Adelaide.

#### A generator of local employment

The LMH is a major employer of residents from Adelaide's northern suburbs.

In 2016, 3,100 people worked in and around the LMH site, of which 2,100 lived within the northern suburbs.<sup>2</sup>



#### Investing in world-class facilities

Over the last 17 years, the LMH has seen more than \$336 million in government investment and has undergone three stages of major redevelopment and rezoning programs<sup>3</sup>, transforming it into a world-class facility, with increased hospital beds, operating theatres and an expanded range of specialist services. The final round of upgrades increased the number of beds at the facility by 96, introduced a women and children's hub and incorporated a helipad into the sites facilities.

A further \$52.5 million expansion of the LMH's emergency department is planned.<sup>4</sup>

#### Growing demand for health services

Since its redevelopment and expansion, the LMH has seen continual growth in inpatient admissions. Emergency service admissions, in particular, increased from 17,000 in 2011 to 23,000 in 2016. In total, the hospital recorded over 47,000 inpatients in 2016, up from around 42,000 in 2011.<sup>5</sup>

#### A centre of future economic growth

The LMH sits at the centre of a shifting health landscape driven by the socio-economic profile of the northern suburbs. The hospital is ideally placed to play a pivotal role in shaping the economic future of the surrounding region.

Future investment at the LMH site has the potential to generate further economic growth, creating new jobs and skilled employment opportunities in the health, aged-care, and social assistance sectors for the residents of Adelaide's northern suburbs.



# Northern Adelaide today


## Trends in population

Adelaide's northern suburbs comprise the local government areas of:

- City of Playford
- City of Salisbury
- City of Tea Tree Gully
- Town of Gawler

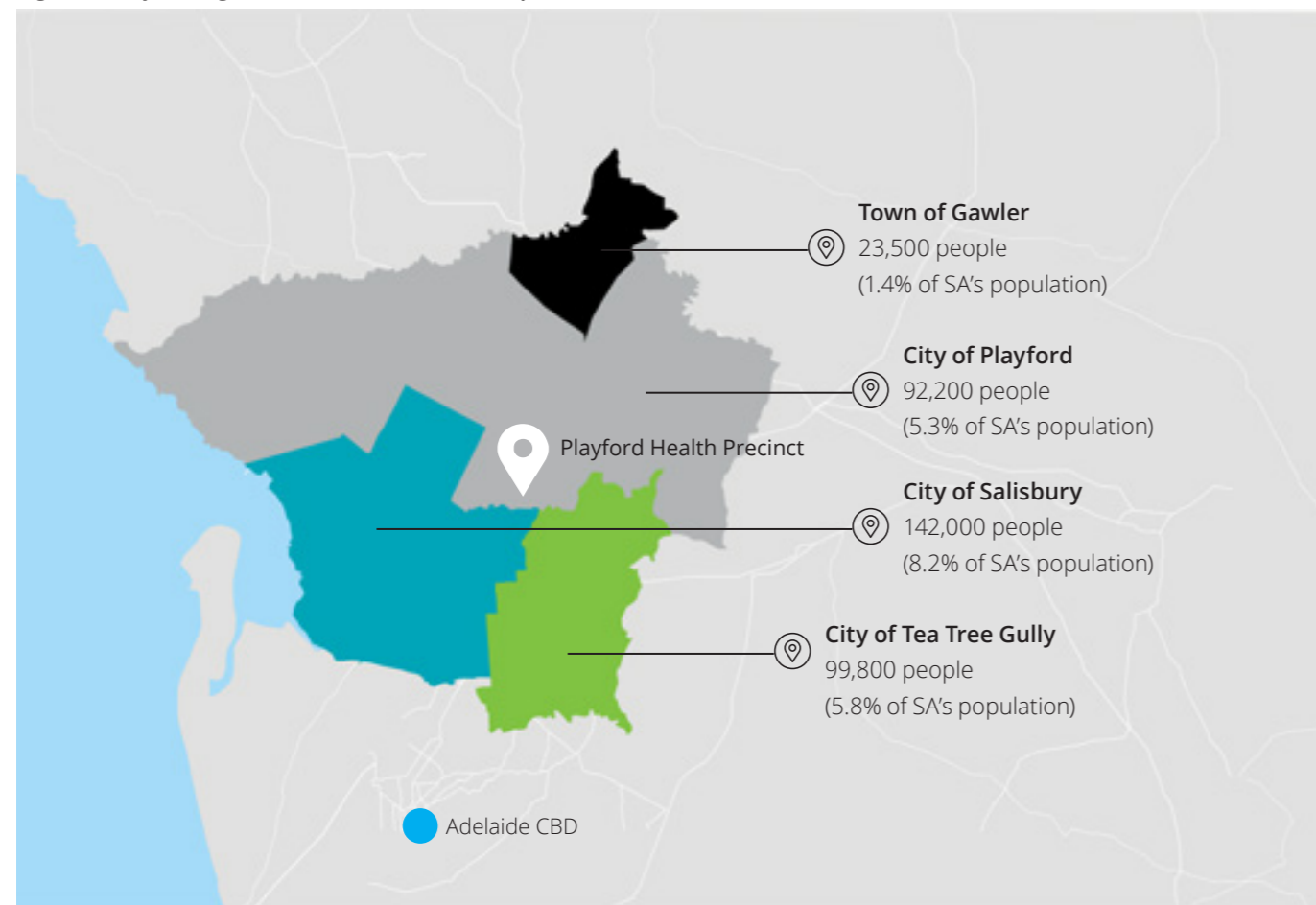
Together, these areas take in a diverse demographic cross-section of South Australia's population – ranging from prosperous and comfortable middle-class households, at one end of the spectrum, to poor socioeconomic and severely disadvantaged households, at the other.

However, the demographics of the northern suburbs are changing rapidly as it's population grows and the local economy undergoes a period of transition and renewal.



Today, Adelaide's northern suburbs are home to some **360,000** people, representing **21 per cent** of the state's population.<sup>6</sup>

Figure 2: Key local government areas that comprise Adelaide's northern suburbs



Source: ABS<sup>7</sup>

### A growing population

Adelaide's northern suburbs are among the fastest growing population areas in South Australia. In recent years, more people have chosen to call Adelaide's northern suburbs home than any other area in South Australia. From 2011 to 2016, an additional 24,000 residents chose to live in the area.<sup>8</sup>

Looking forward, rapid population growth in Adelaide's north is forecast to continue and to outpace the state more broadly – illustrated in Chart 1.



### A young population

An increase in the youthfulness of the area has accompanied the population boom. Adelaide's northern suburbs now have a higher proportion of young people (aged 0-24 years) than South Australia more broadly, as well as a lower share of older people and those most likely to be retired (aged 65 years or more) – illustrated in Chart 2.

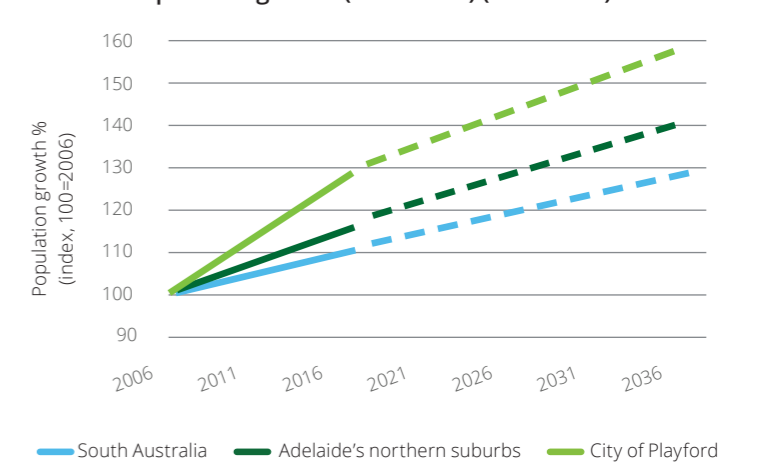


### Ageing quickly

While the northern suburbs are expected to continue to grow, its population is also expected to age at a faster rate than the state as a whole. Based on current trends, the gap between young and old in the area is anticipated to narrow over the next 20-30 years, as the number of people aged 55 years and above grow to equal people aged 0-24 years – illustrated in Chart 3.

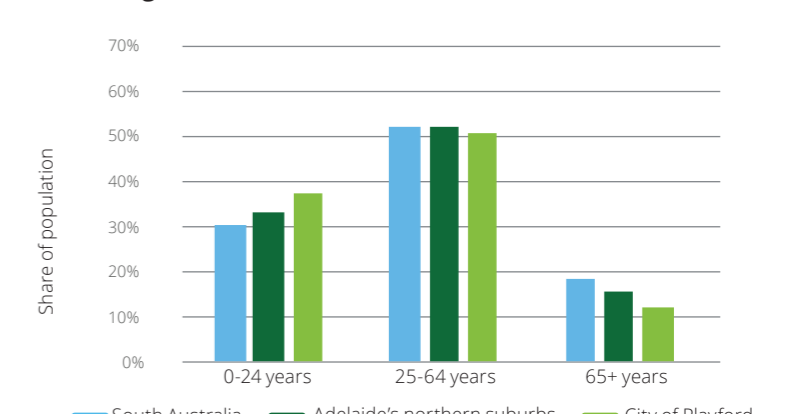


Chart 1: Population growth (indexed %) (2006-2036)



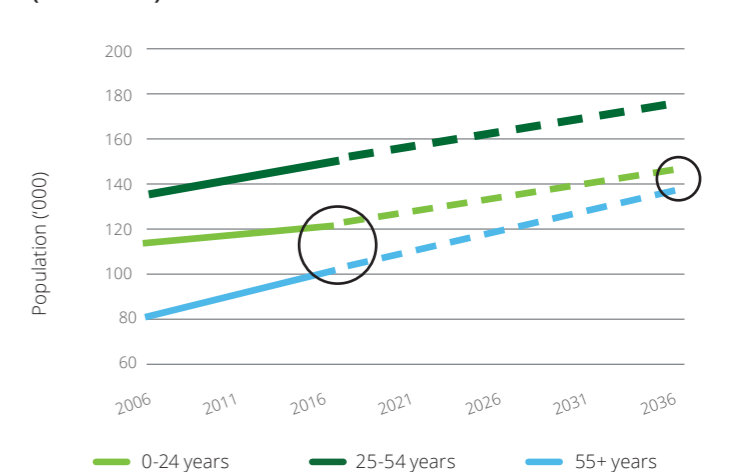
Source: Deloitte Access Economics<sup>9</sup>

Chart 2: Age distribution (2016)



Source: ABS<sup>10</sup>

Chart 3: Population size by age cohort (indexed %) (2006-2036)



Source: Deloitte Access Economics<sup>11</sup>

# Northern Adelaide today

## An economy in transition

Once the beating heart of Australia's manufacturing sector, the economic landscape of Adelaide's northern suburbs for decades was determined by the automotive manufacturing industry. Since 2006, however, the economic composition of the northern suburbs, particularly the cities of Playford and Salisbury, have undergone significant structural change following the decline of manufacturing in Australia.

### Economic diversification

While the decline of manufacturing jobs from the northern suburbs dealt a blow to the region, much of this loss has since been made up for by the growth of other industries, specifically:

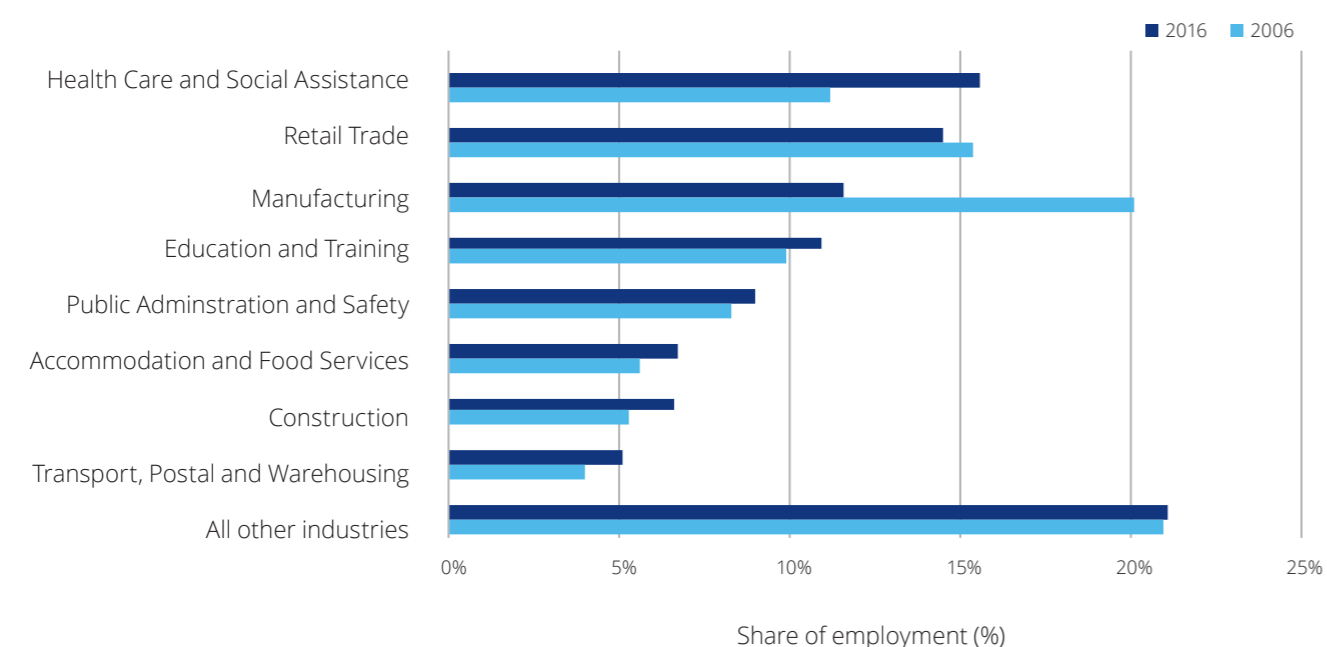
- Health care and social assistance
- Education and training
- Construction
- Accommodation and food services
- Public administration and safety
- Transport, postal and warehousing.

Combined, these industries approximately added an additional 8,750 jobs to the northern suburbs economies between 2006 and 2016 – more than compensating for the net loss of 5,500 manufacturing jobs.<sup>12</sup>

Where manufacturing used to dominate the economic landscape of Adelaide's north, industries such as health, retail, education, and defence now provide a breadth of economic diversity.

This is not to say that manufacturing is no longer important. On the contrary, it continues to remain a key industry in Adelaide's north accounting for 14 per cent of employment – illustrated in Chart 4.

Chart 4: Share of employment by industry: Adelaide's northern suburbs, 2006 and 2016



Source: ABS<sup>13</sup>

## Working locally

While the economic transition of Adelaide's northern suburbs presents a number of challenges, it is important to note that the demand for skills by businesses and employers at and around the LMH are currently met largely at the local level. Figure 3 shows that the majority of people who work in and around the LMH live within the boundaries of Adelaide's northern suburbs.

In 2016, the average distance travelled by those working at the LMH site was 15.3 kilometres.<sup>14</sup>

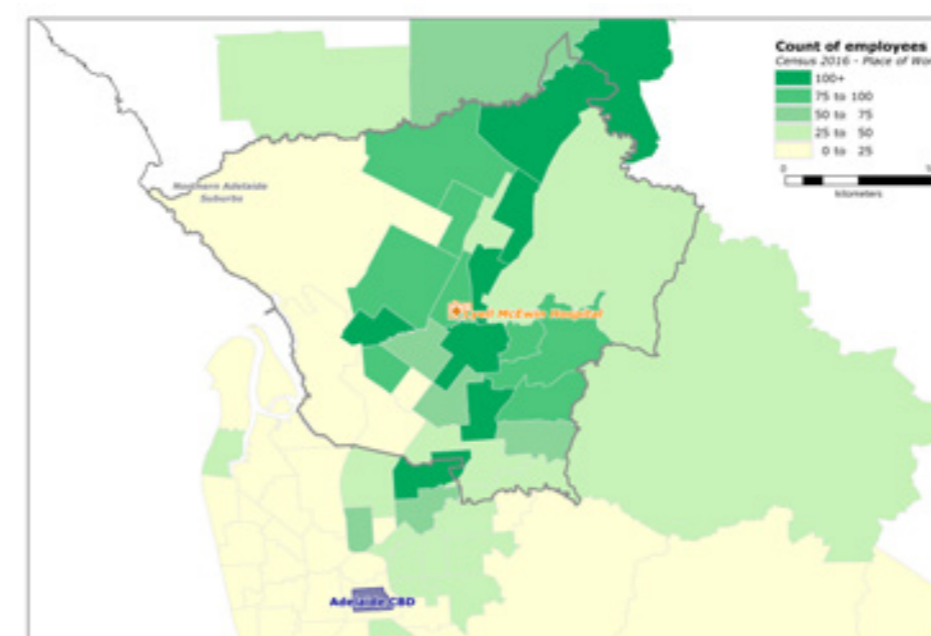
### Transportation barriers

Despite the close proximity of many workers at the LMH to their homes, 96 per cent indicated that they travelled to work by car.<sup>15</sup> This equates to about 2,400 cars travelling to the site on a daily basis, and highlights that there are serious transport and connectivity issues that need to be addressed as the precinct develops.

Playford is currently working with the South Australian Department of Transport and Infrastructure to develop of a bus 'super stop' at the LMH.

There has been considerable success around other precincts in relation to their integration with public transport networks – both road and rail. This integration will be crucial to the growth and attractiveness of a precinct.

Figure 3: Where workers live



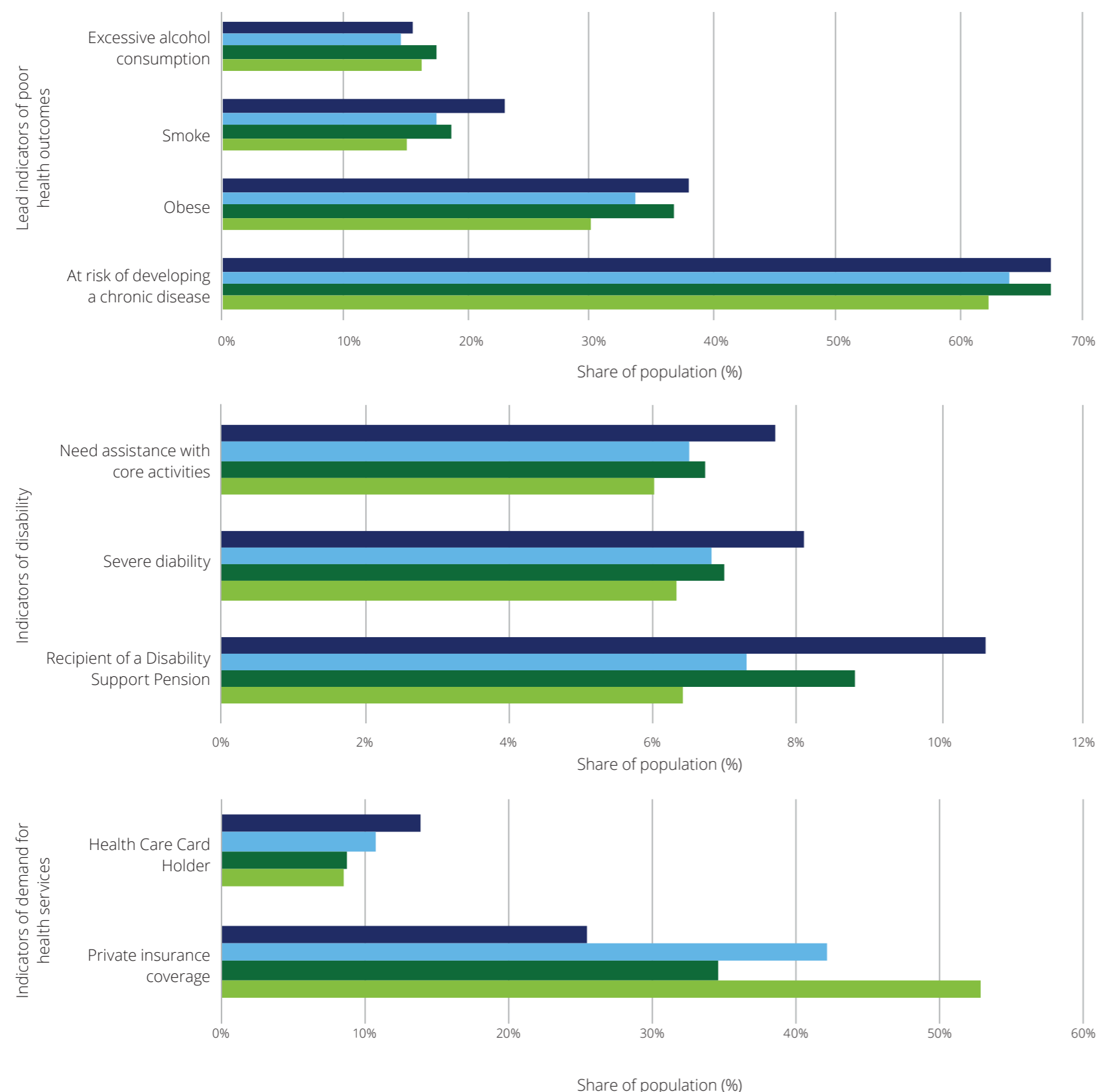
Source: Deloitte Access Economics, ABS<sup>16</sup>

# Northern Adelaide today

## Health and socioeconomic indicators

Chart 5: Selected health measures

■ City of Playford ■ Adelaide's northern suburbs ■ Greater northern region ■ South Australia



Adelaide's northern suburbs, particularly Playford, perform poorly on a range of health and socioeconomic indicators when compared against South Australia more broadly – as illustrated in Chart 5.

Combined, these factors present a risk to the social and economic future of Adelaide's northern suburbs, but also provide a strong indicator of the need for the provision of quality health services in the north.

Poor health outcomes coupled with poor social outcomes entail a higher burden for the provision of health care services, particularly publicly funded services, right across the spectrum – from prevention, to treatment, and palliation.

### Health challenges

Adelaide's northern suburbs are home to a disproportionate number of adults who **smoke** and are **obese**. Both of these are lead indicators for cancer and heart disease. A disproportionate share of residents are also at an increased risk of developing a **chronic disease**.

In addition to indicating poor health outcomes of the resident population, these also indicate high levels of socio-economic disadvantage.

### A spectrum of disadvantage

According to the ABS SEIFA index of relative socioeconomic advantage, Playford ranks in the bottom decile.<sup>19, 20</sup> By contrast, the neighbouring local government areas – Salisbury, Gawler and Tea Tree Gully – rank in the third, fourth and ninth deciles, respectively.

Typically, people who live in areas with poorer socioeconomic conditions tend to have worse health outcomes than people from less disadvantaged areas.<sup>21</sup>

### In need of assistance

A high proportion of adults with a severe disability, as well as those in need of assistance undertaking daily activities, also live in Adelaide's northern suburbs. The share of residents holding a Commonwealth Government Health Care Card or receiving a Disability Support Pension is also higher than the state average.

### Demand for private health services

While private health coverage in certain parts of Adelaide's northern suburbs are exceptionally low, on the whole, a sizeable minority of adults have private health insurance – approximately 42 per cent. We explore the implications of this later.

Source: ABS<sup>17</sup>, PHIDU<sup>18</sup>

# Health gateway to South Australia's greater northern region



Pandalowie Bay on the Yorke peninsula.<sup>22</sup>



Sevenhill Cellars in the Clare Valley.<sup>23</sup>



Big Bend, Murray River.<sup>24</sup>

Table 1: Top 10 regional centres

Population centre	Population size	% of SA pop.
Port Pirie	13,743	8.5%
Nuriootpa	5,685	3.5%
Renmark	4,638	2.9%
Kadina	4,583	2.8%
Tanunda	4,325	2.7%
Moonta	4,175	2.6%
Berri	4,086	2.5%
Walleroo	3,988	2.5%
Loxton	3,843	2.4%
<b>Greater northern region</b>	<b>162,258</b>	<b>9.7%</b>

Source: ABS<sup>25</sup>

## SA's greater northern region

Home to about 162,000 people (10 per cent of the state's population), this vast area stretches across South Australia's northern agricultural regions and takes in major population centres, including:

- Port Pirie to the north
- Kadina-Moonta-Walleroo to the north-west on the Yorke Peninsula
- the north-east riverland towns of Berri, Loxton and Renmark.

It also includes major townships in the prosperous Barossa and Clare Valley wine and tourism regions. The location and sizes of the townships are further explored on the next page.

## Home to a greying population

Adelaide's greater northern region is particularly popular with older people and retirees. While the population growth of this area is considerably slower than in Adelaide's northern suburbs, these regional areas are ageing at a faster rate because population centres, such as Kadina and Wallaroo on the Yorke Peninsula, are attracting older retirees.

An increasing number of people who choose to live in regional SA are at the stage in life when access to health services becomes increasingly important.

## Health gateway

The Playford Health Precinct sits along the key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia. For the 162,000 people living in the region, the LMH is the nearest full-service tertiary public hospital.

Geographically, the Playford Health Precinct is strategically situated to serve as a health gateway to a regional population well beyond Adelaide's northern suburbs.

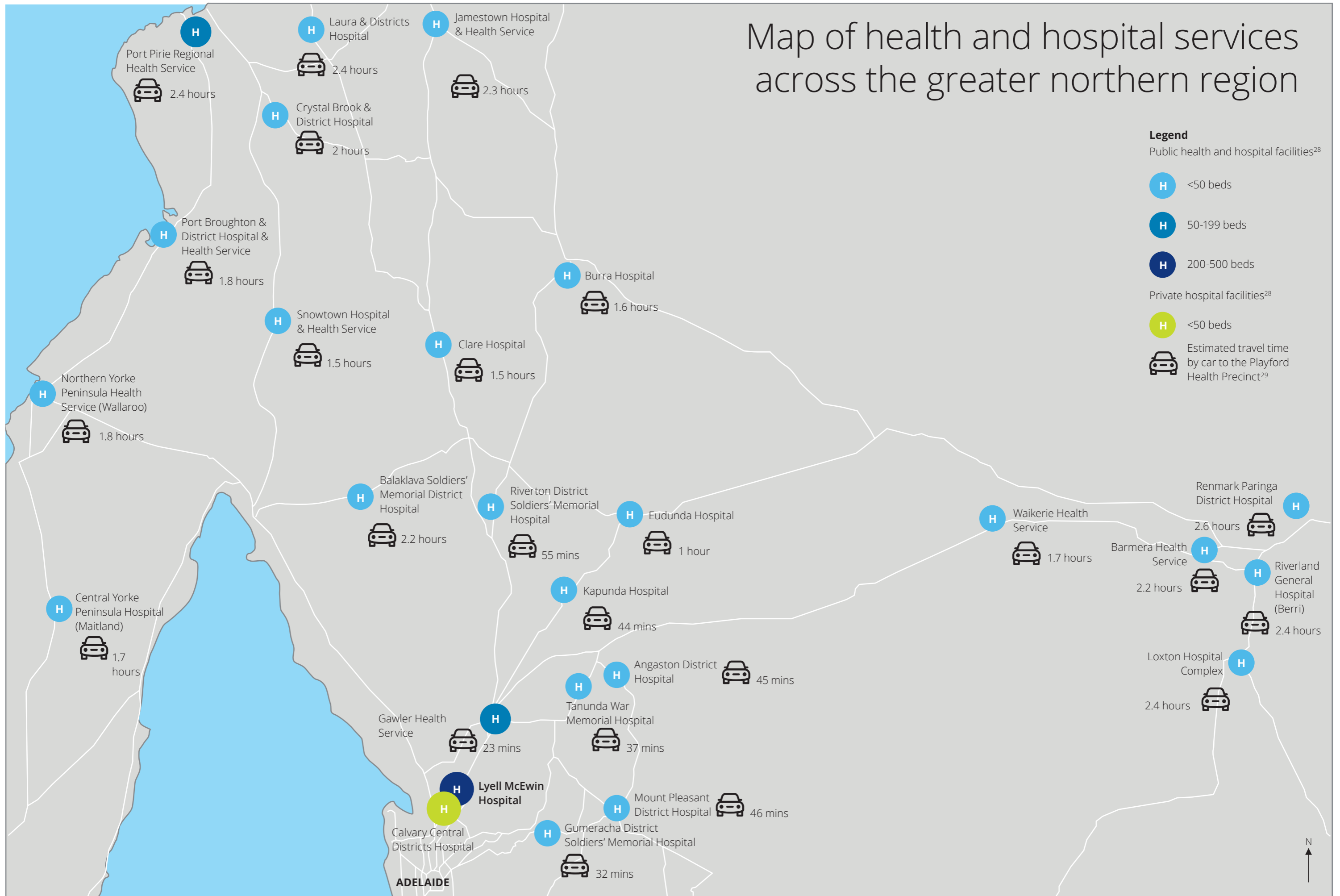
## Limited local health services

Although there are many health services and hospital services dotted across the greater northern region, these are all small public facilities that offer a very limited number of services. The majority of the health facilities across the region have fewer than 50 beds, and offer limited emergency services and no significant surgical services.<sup>26</sup>

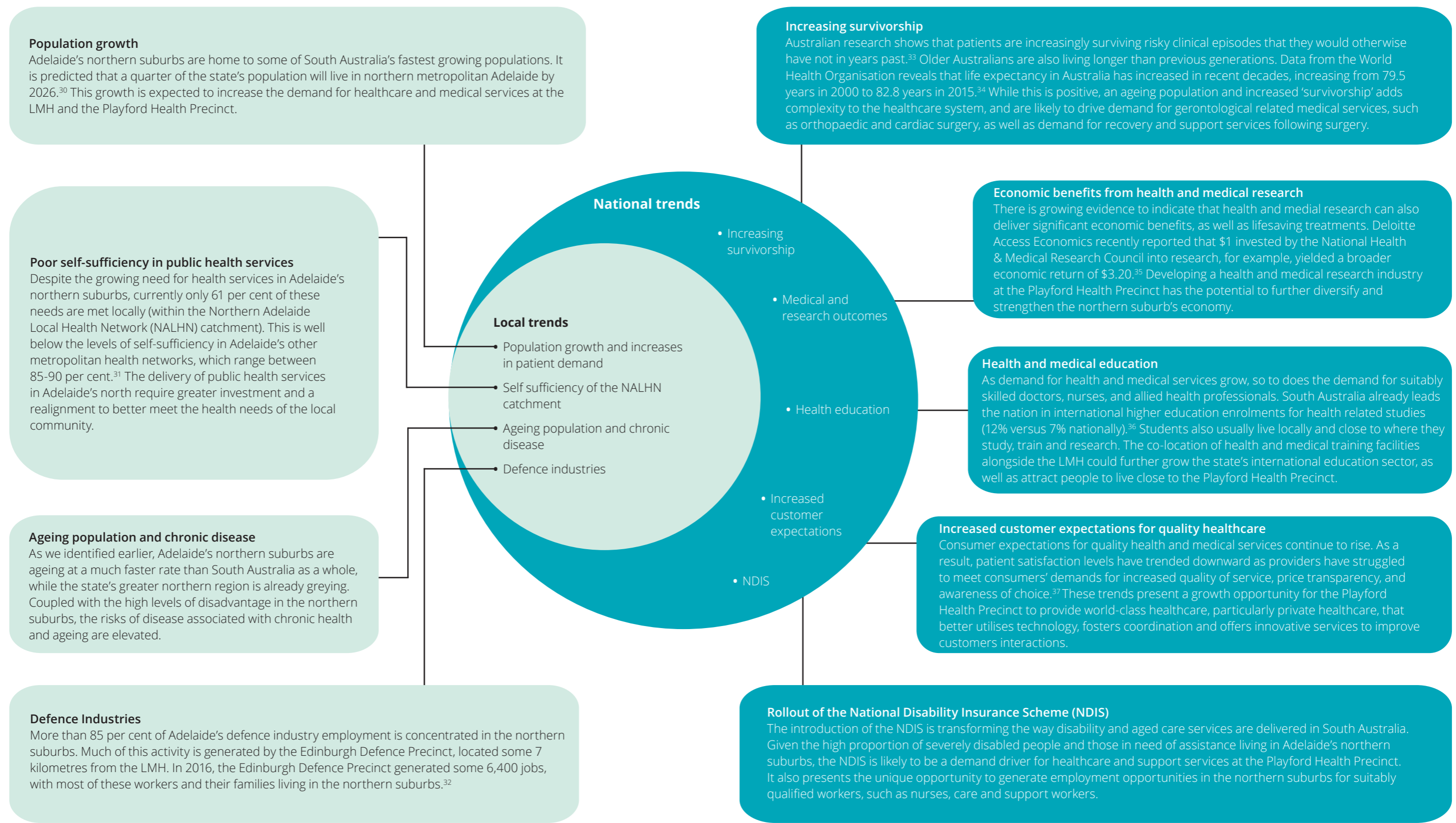
There is also a complete absence of private hospital services in the region.

The estimated maximum drive travel time to the LMH from the furthest location in the region, Renmark, is 2 hours and 33 minutes.<sup>27</sup>

# Map of health and hospital services across the greater northern region



# Drivers of growth for health services



# Opportunities for change

## Building a precinct eco system

### A new model for economic growth

The concept of a precinct acting as driver of local economic development was posited in the 2014 Brookings Institute paper, *The Rise of Innovation Districts*.<sup>38</sup> This paper considered precincts, or Innovation Districts, as geographically compact areas where leading-edge anchor institutions and companies cluster and connect.

Innovation Districts are integrated environments that create a mutually beneficial eco system to increase the likelihood of knowledge spillovers, new product development and innovation, which drive economic growth.

Innovation Districts represent an intentional effort for the establishment of new products and services, the bringing together of new technologies, as well as market-based solutions through the convergence of numerous, sometimes disparate, sectors and specialisations.

Innovation Districts emphasise geographic compactness, accessible and walkable spaces, and a digitally connected urban environment that combines commercial, retail and residential to generate complementary economic activity.

### Embracing a changing environment to develop a world-class health precinct

Local and national trends mean that the future of health services are rapidly evolving. There are numerous potential opportunities to integrate medical services and health care with education, research, and commercial development.

Further opportunities exist around the site to leverage the past success of the LMH and the more than \$336 million in government investment the hospital has received over the last 15 years, and also to leverage future investments, such as the soon to be established ACH facility and the \$52.5 million expansion of the LMH's emergency department. There is potential for private and non-government businesses and industries to benefit from the continued investment and commitment by government to sustain and grow the economic activity around the hospital.

As the demand drivers around the site grow, there are an increasing number of prospective opportunities for:

- Expanded hospital services – especially private hospital services
- Expanded and improved health, medical and care services – particularly relating to the treatment of chronic disease and conditions associated with ageing
- University education, training and research facilities – particularly relating to allied health, aged and disability care, as well as Defence health.

### Vision of the Playford Health Precinct eco system

- Existing precinct drivers
- Current development
- Future opportunities



Diagram is provided for conceptual purposes only and includes selected anchor institutions, networks and local drivers for the Playford Health Precinct eco system

# Hospital services

## Building a reputation as a leader in the treatment of chronic diseases, acute care and geriatric medicine

Based on the health and medical services already provided at the precinct, combined with current and expected health needs of those living within the precinct catchment, there is an opportunity for the Playford Health Precinct to develop a specialist focus and to build a reputation as a leader in the treatment and delivery of certain health services. These could include:

- Chronic diseases associated with socioeconomic disadvantage – diabetes, obesity, and cardiovascular disease
- Acute care services – urgent medical and surgical treatment and short-term care
- Conditions and illnesses associated with ageing – gerontology and geriatric medicine
- Longer term health care and recovery services – aged and disability care
- Allied health and social assistance services.

### Private hospitals

There are limited private hospital facilities servicing the populations of Adelaide's northern suburbs. As a result, residents are forced to travel long distances to utilise private health facilities around Adelaide's CBD. Not only does this adversely affect those living in Playford, Salisbury and Tea Tree Gully, but also those living in regional areas such as the Barossa and Clare Valleys, as well as those choosing retirement hotspots, such as Kadina and Moonta on the Yorke Peninsula, or Berri along the Murray River.

Despite 42 per cent of the population in Adelaide's northern suburbs having private health coverage, there is only one small-scale private hospital facility within close proximity to the LMH. Further, there are no private hospital facilities located across the greater northern region.

The development of a private hospital at the Playford Health Precinct could leverage off the adjacent LMH by establishing specialist centres focusing on the delivery of medical and care services complementary to those already delivered at the LMH. These services could include:

- Cardiothoracic surgery
- Ear, nose and throat surgery
- General surgery
- Maternity services
- Orthopaedic surgery
- Paediatric surgery
- Vascular surgery.

This relationship between private and public hospital services at the Playford Health Precinct could reduce the pressure on the LMH and free up resources, which are only likely to increase as the population and health demands grow.

A private hospital at the Playford Health Precinct could also complement and help to improve services at the LMH by attracting a greater number and range of medical specialists and professionals.

### The Lyell McEwin Hospital (LMH)

As reported earlier, the LMH has seen significant investment over the last decade. There is an opportunity for the Playford Health Precinct to further capitalise on this investment and leverage the State Government's commitment to the LMH by concentrating future development at the precinct around the treatment of, for example:

- chronic illnesses
- acute care
- geriatric medicine.





# Aged care, allied health and other health services

## Servicing local health needs

### Aged care

As already identified, a rapidly ageing population in Adelaide's northern suburbs is likely to place increasing pressure on health services in the region. This will likely increase the demand for:

- acute medical and recovery services
- specialist medical gerontology services
- residential aged care facilities.

Already, the development of the ACH Healthia and ViTA North aged-care and allied health facility at the precinct is a significant step. The planned capacity of this facility, however, accounts for a fraction of what is likely to be required in the future.

Establishing a cluster of health and care services targeting an ageing population could also provide the 'critical mass' necessary to help attract training providers specialising in aged-care and the development of education facilities at the precinct.

### Allied health

The recent launch and rollout of the NDIS is expected to increase the demand for allied health workers with specialist skills, such as:

- physiotherapists
- speech pathologists
- occupational therapists
- social workers.

In addition, the new scheme is also expected to generate demand for workers in support roles – such as, nursing and direct care workers, as well as administrative workers with knowledge of clinical health services.<sup>39</sup> Growing this workforce to meet anticipated demand will require expanding education and training facilities.

Further, the population of Playford has a much higher proportion of those with a severe disability than the state average. This presents an opportunity for the precinct to capture the demand for these services due to the high incidence of disability in the northern suburbs.

There is an opportunity for the Playford Health Precinct to meet the increasing demand for both allied health services and workers.

### Defence Health

The proximity of the Edinburgh Defence Precinct to the Playford Health Precinct presents a unique opportunity to cater to the specialist health needs of the large defence workforce, serving Australian Defence Force (ADF) personnel and their families, as well as those transitioning out of the ADF and veterans. This could include niche services such as:

- Specialist general practice medicine and allied health services
- Mental health and specialist psychological services in the treatment of depression or post-traumatic stress
- Treatment and rehabilitation services for physical trauma.

There is also scope for these services to be integrated with institutes for defence health research at the precinct. These research institutes could focus on understanding and developing better health treatments, particularly in mental health, for defence personnel and veterans of conflict. This could involve the development of digital technologies, such as virtual reality, or innovations involving the advanced manufacture of artificial body parts and prostheses. The roll-out of GigCity, for example, is likely to enhance these sort of developments.

### Other health business

There is potential for the precinct to go beyond education and research and participate more actively in the development, commercialisation and manufacture of health innovations.

The precinct could serve as a 'test bed' for the trial of new health and medical technologies as part of the commercialisation process.

There is also the potential for a range of other health services at the precinct, including:

- Dental services
- Radiology services
- Specialist consulting rooms
- Audiology services
- Counselling services.

Further, the precinct could attract auxiliary services whose business it is to support the activities of health and hospital services, including:

- Pharmaceutical services
- Pathology services
- Optometry services
- Natural therapy services
- Health and medical equipment suppliers.



# Education, training and research

## Growing a greater university presence and creating a medical research community

While there are tertiary education institutions located around Adelaide's northern suburbs, the presence of these facilities is limited and none have a health or medical focus. Further, the northern suburbs have some of the lowest per capita densities of university education in South Australia.<sup>40</sup>

The Playford Health Precinct has the potential to grow the presence of university level education in Adelaide's north, as well as broaden the courses and qualifications offered. This could include both TAFE and vocational education as well as university institutions. Co-locating one or more tertiary education institutions at the health precinct would create a complementary mix of students, researchers, academic leaders, medical professionals and industry.

The co-location of university education and research facilities alongside hospital and healthcare facilities could help to promote innovation and creativity within the health precinct, as well as provide the sorts of high-skill education opportunities to those living in Adelaide's north that are likely to drive future economic growth and fuel employment demand.

### Tertiary education and training

The Playford Health Precinct presents opportunities to integrate the delivery of medical and healthcare services with education and training, and research concentrated around the precinct's potential specialist health areas, including:

- Acute and aged care
- Chronic diseases
- Allied health
- Social assistance and disability care.

In partnership with the health precinct, research institutes could assist in training medical students and improve the skills base of the local workforce.

There is potential to train students at the Playford Health Precinct and contribute to creating a skilled workforce in the northern suburbs.

### International education

Demand from overseas students wanting to study at Australian universities is expected to continue to increase.<sup>41</sup> To capitalise on international education and attract overseas students to live and study at the precinct, there are opportunities to establish high quality teaching and research facilities at the precinct. These include:

- Digitally enabled teaching and conference spaces
- State-of-the-art simulation facilities for practical learning, particularly in acute, aged and disability care
- Well-equipped laboratories suitable for clinical research and testing.

In addition, international education also presents an opportunity for a range of accommodation facilities, sporting and recreation facilities, as well as a range of culturally diverse retail and food outlets that are likely to appeal to overseas students to be established at the precinct.

Growth in international education presents an opportunity to develop university education and training facilities at the health precinct, as well as attract students from overseas to study in one of the precinct's potential specialist health areas.

### Health and medical research

As we reported earlier, health and medical research can be a significant driver of economic growth. Several fields of health research – such as, those related to ageing, gerontology and geriatric medicine – are increasing in significance and are the same areas of health that align with the Playford Health Precinct's strengths.

Co-locating health research with clinical facilities and teaching activities has the potential to result in knowledge spillovers and generate innovation.

Growing the research profile at the precinct also has the potential to create a focus for new private sector investment that further attracts skilled workers to the area.





# Playford's commitment

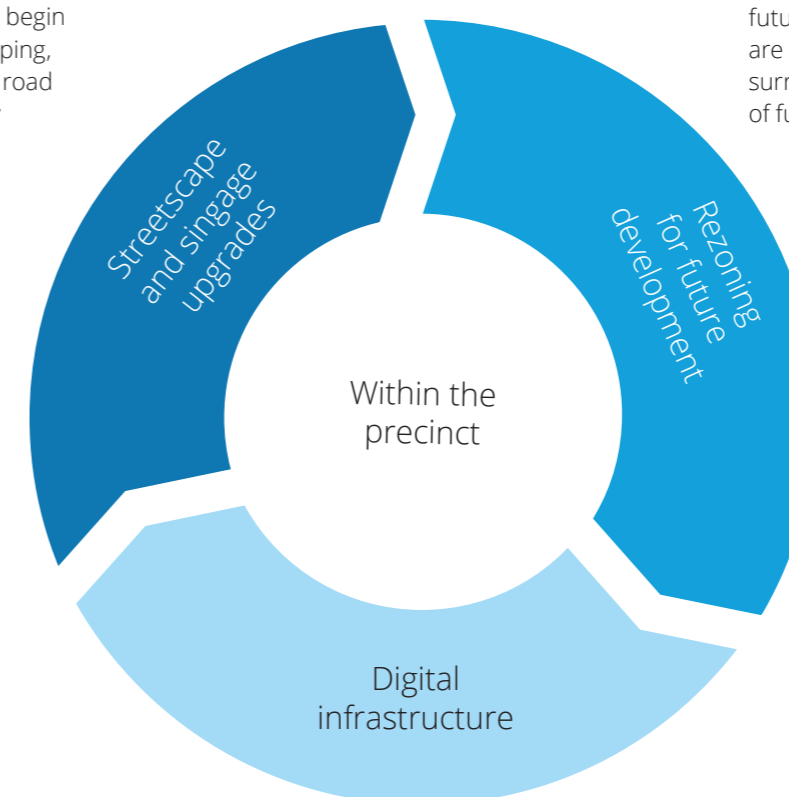


An expanded Playford Health Precinct has the potential to reinvigorate the surrounding areas and create an environment where doctors, health researchers and students choose to live, not just work.

A clear urban structure and coordinated layout will make living and working around the Playford Health Precinct increasingly attractive. In the future, this will likely make it easier for workers, visitors, as well as potential students and residents to access the precinct's many facilities. At a street level, there are opportunities for activation at the precinct to further enhance the appeal of the urban space, as well as better connect the precinct to its surrounds.

To support and complement the expansion of the area surrounding the LMH, Playford is committing \$144,000 to upgrade streetscapes and signage as part of its Asset Management Plan. These upgrades are expected to begin in 2018 and include new landscaping, footpaths, streetlights, curb and road seal replacement, and smart city infrastructure.<sup>42</sup>

The City of Playford rezoned 9.5 hectares of residential and council land surrounding the LMH site, in 2013, for the purpose of future commercial development. There are also plans to rezone additional land surrounding the precinct for the purpose of future expansion.<sup>44</sup>



The council is exploring the option of expanding its dark fibre optic network cable into the health precinct to help promote investment, connectivity and research capabilities at the site. The Dark Fibre network currently links the Playford CBD to operations at Davoren Park, offering new tenancies internet speeds of up to 10 gigabits.<sup>43</sup>

# Delivering on a precinct vision

The creation of a thriving and inclusive precinct eco system requires buy-in from both public and private sector partners and stakeholders. While the City of Playford is providing the vision for the Playford Health Precinct and acting as a catalyst for change, it cannot (nor should be expected to) build an eco system alone.

## Governance

A collaborative precinct governance and leadership model that engages influential representatives from community, business and community development sectors is a proven method for making things happen.

An engaged Precinct Management Alliance (PMA) will create a neutral, open and inclusive forum for stakeholders to share ideas, develop policy and projects that advance the precinct. A good PMA would be a continuation and expansion of existing stakeholders in the precinct to include prospective commercial stakeholders and community interests.

## Securing Government support

Government involvement and leadership across all levels of government is required. The key role of government in the development of the precinct is to facilitate and support private sector development and to deliver the public infrastructure necessary to attract investment.

## Investment attraction

New models of partnership between the public and private sectors need to be established. Strong private sector involvement in a PMA is an important part of this. However, to strengthen collaboration, the public-sector needs to ensure that opportunities for private sector investment exist. This could involve:

- Public sector involvement in the delivery of public projects
- Joint public-private funding of new research and health promotion programs.

## Planning and regulatory levers

Future planning frameworks established for the City of Playford need to emphasise the high priority of the Playford Health Precinct and encourage uses consistent with the vision.

A unified voice for the health precinct across all planning and investment decisions by the City of Playford will signal the importance of the precinct and council's commitment to state and commonwealth governments, as well as potential private-sector investors.

## Monitoring progress

What gets measured, improves.

Establishing targets for the precinct and setting goals will be crucial to the development of the Playford Health Precinct, and another reason in support of the establishment of a PMA.

## Next steps

This document is an important step along the journey in the establishment of the Playford Health Precinct. However, it does not take the place of nor fulfill the requirements of the rigorous economic analyses required by prospective stakeholders, particularly the State and Commonwealth Governments, before making serious and firm commitments.

These types of studies include:

- cost-benefit analyses
- economic feasibility studies
- economic impact and contribution studies.

Furthermore, business cases for the involvement for each prospective stakeholder would need to be made. These should align with the singular unified vision of the precinct. Ensuring this process is undertaken and evaluated should form part of the PMA's mandate.





# Case studies from around Australia

In Australia, the economic benefits of precincts are being recognised, and numerous precinct developments focusing on health, education, science and innovation have been established by state and local governments. Deloitte has extensive experience in examining a variety of precinct developments across Australia, and quantifying their contributions to the local and state economies.

These include:

- The Westmead Innovation Precinct in Western Sydney
- The Prince Charles Hospital Campus in Brisbane
- The Campbelltown Health and Education Precinct in Western Sydney.

These precincts are featured as case studies to provide examples of what precincts can look like, as well as the economic benefits that they are delivering to their local communities.



## Westmead Innovation Precinct, Western Sydney

Located in the heart of Western Sydney, about 25 kilometres from Sydney's CBD, Westmead has grown from humble beginnings to become Australia's largest health services precinct. Situated in an area with a rapidly growing population and unique health challenges, the precinct now employs 18,000 people and provides essential health services to almost 10 per cent of Australia's population.<sup>45</sup> In addition, the precinct provides education services to over 3,400 students from pre-schoolers to PhD candidates.<sup>46</sup>

Originally home to a dusty showground on the outskirts of Sydney, today Westmead is a national and international leader in health delivery, research, education and commercialisation. The precinct is home to a range of complementary institutions, with major tenants of the precinct including the University of Sydney, Western Sydney University, the Children's Hospital, Westmead Hospital and Children's Medical Research Institute. The focus of Westmead is on integrating both research and education with clinical care. The precinct has a distinct position within the research areas of cell biology, cancer genomics, bioinformatics and diagnostic sciences. In addition, the paediatric capabilities of the precinct are world class.

Westmead's composition and growth has allowed it to capture increasing demand for medical care, education and commercially integrated research, driven by the meteoric growth of Western Sydney's population and growing demand from Asia. Alongside this, it is playing a pivotal role in the economic transformation of the Western Sydney area, helping to tackle the range of social and economic challenges faced by Western Sydney.

In 2016, Westmead contributed over \$1.9 billion, or 1.6 per cent, to Western Sydney's local economy.<sup>47</sup> Furthermore, Westmead continues to be a destination for public and private investment. In the last four years alone, over \$1.5 billion was committed by government and universities to upgrade the precinct, with \$950 million of this contributing toward a facility capable of accommodating 9,000 students.<sup>48</sup> In the near future, upgrades to commercial amenity are anticipated to accompany university expansion, with \$3.4 billion worth of capital currently mobilising within the precinct.<sup>49</sup>

### Lessons for Playford

- A model for how a successful innovation and health precinct can be developed and governed
- The economic impact that precincts can bring to a local economy
- How a precinct can attract public and private investment



# Case studies from around Australia

## Prince Charles Hospital Campus, Brisbane

The Prince Charles Hospital Campus (TPCH) is situated on a 35 hectare site, ten kilometres from the Brisbane CBD.<sup>50</sup> Surrounded by parklands and recreational facilities, the site is home to a full service public hospital, which provides secondary and tertiary care, and is co-located with the privately operated Holy Spirit Northside Hospital. TPCH campus is one part of the Metro North Hospital and Health Service – one of the largest health services in Australia, with a catchment of over 900,000 people.<sup>51</sup>

TPCH is a global leader in clinical and translational research programs, with a particular focus on cardiac thoracic surgery and orthopaedic and critical care, with other areas of research including stem-cell therapy, additive manufacturing and robotics.

TPCH has achieved international recognition for facilitating the research of Dr Daniel Timms, who designed the world's first bionic heart. Currently, TPCH has proposals underway for the development of a specialist endoscopy service and new heart and lung institute.

TPCH campus offers a prime example of the benefits which can potentially flow from the effective integration of education, training, research, clinical delivery and the commercialisation of products and services. These benefits include knowledge spillovers and innovative solutions driven by scaled resources through institutional collaboration. It is also a great example of the tremendous opportunities for investment and growth, which flow from housing a range of complementary

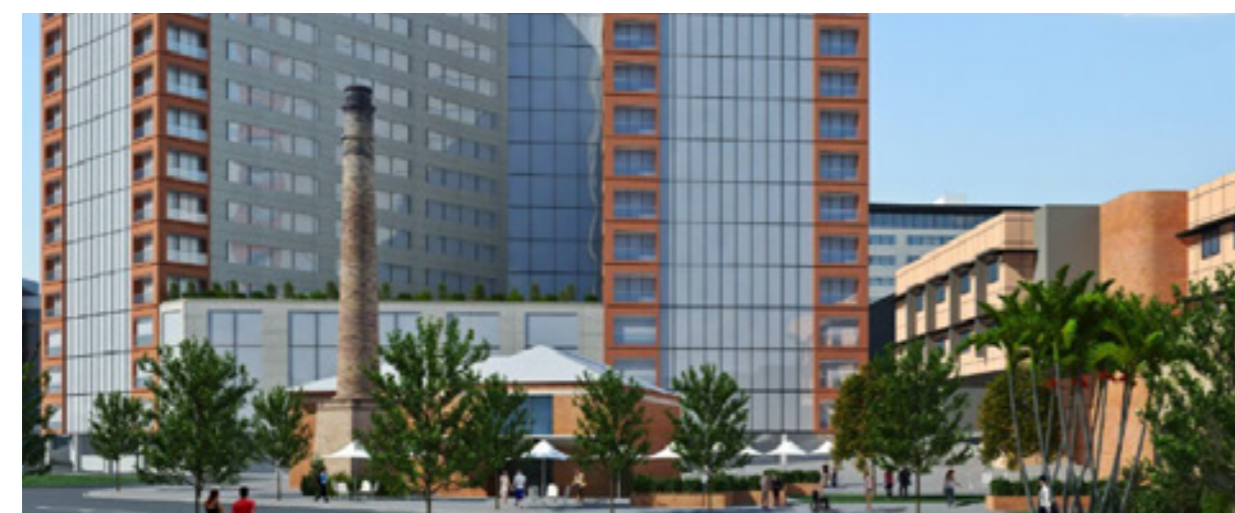
leading health and research institutions on the same site. In recognition of these opportunities, TPCH is making a concerted effort towards investment attraction in order to further upgrade and transform the hospital site into a world class research and innovation and education facility.

With the help of Deloitte, TPCH has made a strong case for investment at the site, identifying a number of economic drivers, including:

- Exceptional historical returns on investment for health research
- The comparative advantage of investing in a Research sector which already has a strong base and an international reputation
- Pre-existing comparative advantage in the International Education and Training sector
- A high and increasing demand for healthcare in the Asia-Pacific region, which is geographically close to TPCH
- The ability to build on past investments in the healthcare industry, which have built world class research institutes and scientific capabilities
- A unique IP policy – under which intellectual property generated through research is retained by the partners who develop it
- Extensive land available which will allow for developments of up to 12 stories high.

### Lessons for Playford

- How a precinct can find success through specialised and focused health and medical services



## Campbelltown Health and Education Precinct, Western Sydney

The Campbelltown Health Precinct is located at the heart of the regional city of Campbelltown in south-western Sydney. Of the five Health and Education precincts that make up Western Sydney's regional health network, the Campbelltown precinct is the largest, at approximately 400 hectares. Campbelltown Hospital is part of the South Western Sydney Local Health District, an area with a catchment of around 966,000 people.<sup>52</sup>

Major Infrastructure in the zone, such as Western Sydney University and Campbelltown Hospital have been there since the 70's, but in recent decades the precinct has grown in size and moved into areas such as manufacturing and research.

Campbelltown is one of the nation's fastest growing population centres and is expected to grow by another 48 per cent over the next two decades to 1.59 million people.<sup>53</sup> This population boom is great news for Campbelltown, but it is accompanied by more than a few socioeconomic challenges.

With low SEIFA scores and poor health outcomes compared to rest of New South Wales, Campbelltown is also one of the most disadvantaged regions in the state.<sup>54</sup> To add to this, Campbelltown also has a higher concentration of social housing residencies, as well as residents with disabilities than the rest of the state. The combination of these factors present a serious challenge for Campbelltown, but they also present a significant opportunity

to pivot its economic trajectory in a positive direction.

In early 2017, the Campbelltown City Council engaged Deloitte Access Economics to collaborate with strategic stakeholders to establish a vision and framework for the Campbelltown Health and Economic Precinct.<sup>55</sup> As part of this vision, social and economic factors were identified as key drivers for the development of a world leading Health and Innovation Precinct within the Campbelltown CBD.

In addition to addressing population health issues, implementing this vision will also allow Campbelltown to leverage its unique endowments in ways that address local challenges around access to employment opportunities. Campbelltown is in the early stages of implementing this vision. Underpinning Campbelltown's vision are strategic goals to:

- Become a national leader in medical science education
- Grow the research and services presence in children's, maternal and indigenous health
- Build on existing comparative advantage in gastro motility, paediatrics, Chinese and maternal medicine.

### Lessons for Playford

- How a precinct can be established in a disadvantaged area and be seen as a new model for economic growth locally





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