



ECONOMIC IMPACT REPORT

CHARLES STURT UNIVERSITY


2 MAY 2018



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Economic Impact Report Prepared for Charles Sturt University

2 May, 2018.

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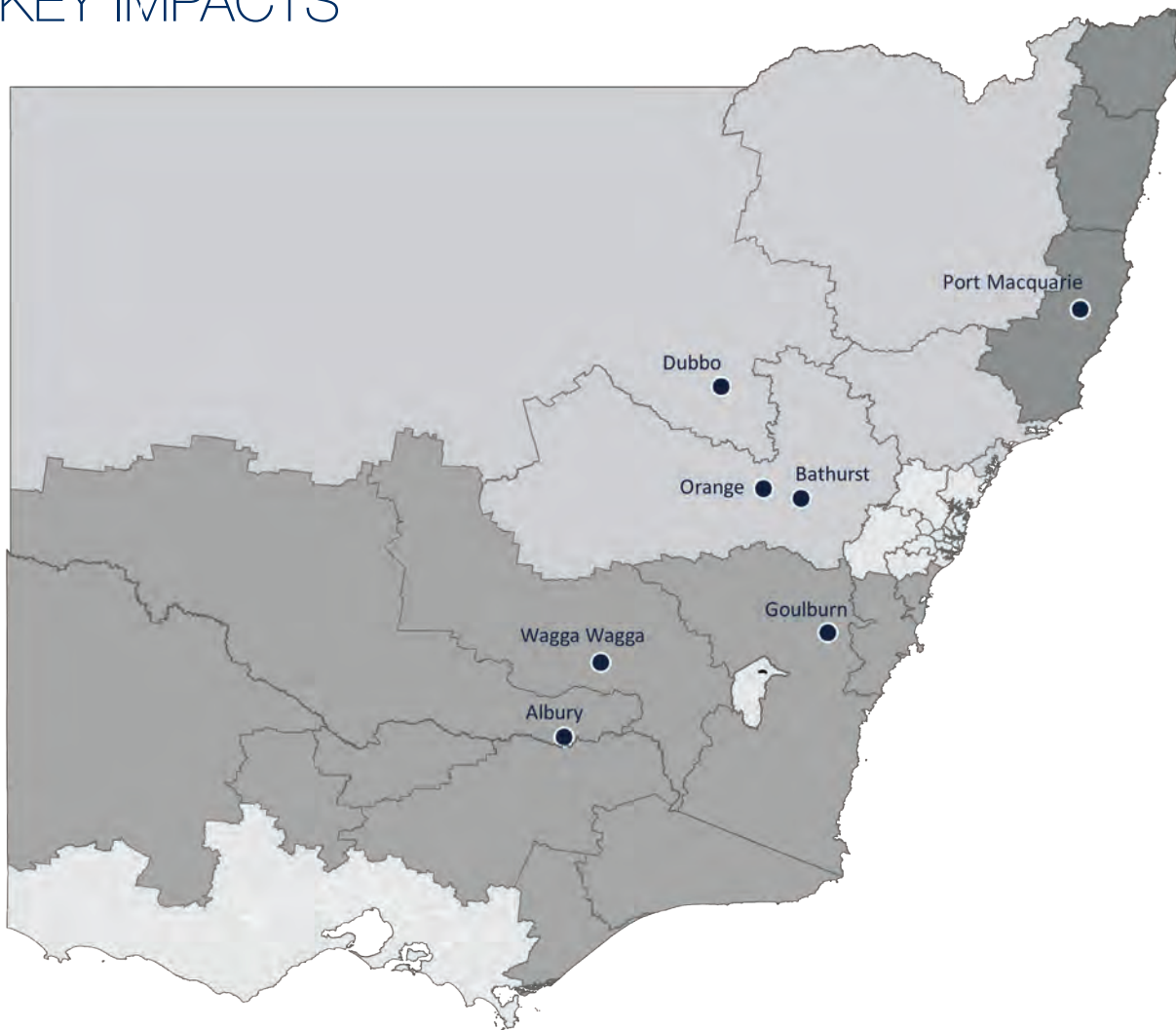
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Photo source: news.csu.edu.au

KEY IMPACTS



	GRP \$m	Employment FTE	Income \$m
Central Region	213.4	1938	151.8
Bathurst Regional LGA	170.4	1517	120.1
Dubbo Regional LGA	8.4	107	8.1
Orange LGA	41.6	390	28.3
Northern Region	17.7	104	8.2
Port Macquarie-Hastings LGA	19.4	115	9.0
Southern Region	388.0	3317	272.4
Albury LGA	93.2	844	66.8
Goulburn Mulwaree LGA	26.3	156	12.3
Wagga Wagga LGA	280.7	2371	198.3
Australian Capital Territory	12.0	99	10.4
Sydney Region	96.8	432	37.3

INTRODUCTION

Charles Sturt University (CSU) is a multi-campus university located in the New South Wales regional centres of Albury, Bathurst, Dubbo, Goulburn, Orange, Port Macquarie and Wagga Wagga. CSU also has a presence in the metropolitan centres of Canberra, Sydney, Melbourne and Wangaratta in regional Victoria.

CSU commissioned the Western Research Institute (WRI) to undertake an analysis of their economic impact for 2016. A similar study was conducted in 2011 and 2015 by WRI. The aim of the study was to estimate the economic impact of the operations of CSU and the expenditure of non-local students on the regions of the university's main New South Wales campuses.

The economic effects of CSU on the local and regional economies of its campuses was measured in terms of Gross Regional Product (GRP), household income and full-time equivalent employment (FTE). The impacts were based on the analysis of data for 2016 regarding:

- CSU campus operations, including expenditure and employment.
- CSU student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies.
- CSU capital expenditure, including all expenditure on CSU assets.
- Additional expenditure, comprised of the combined operational and capital expenditure made by CSU campuses from outside a given region, in that region.

The economic impact for 2016 was estimated for the following main campuses and the broader regions within which they are located. Table 1 details the modelling region for each of the CSU campuses and Table 2 provides information on the statistical geography used to create the broader regions modelled in this report.

Table 1. Campus Region Geography

CSU campus/activity	Geographical Region
Port Macquarie	Port Macquarie-Hastings LGA
Bathurst	Bathurst LGA
Dubbo	Dubbo Regional LGA
Orange	Orange LGA
Albury	Albury LGA
Goulburn	Goulburn Mulwaree LGA
Wagga Wagga	Wagga Wagga LGA
Australian Capital Territory	Australian Capital Territory

Sydney Region

Aggregation of the following Statistical Area 4 (SA4) regions in the Sydney basin:

- | | | |
|---|--|------------------------|
| <ul style="list-style-type: none"> • Central Coast • Sydney - Baulkham Hills and Hawkesbury • Sydney - Blacktown • Sydney - City and Inner South • Sydney - Eastern Suburbs • Sydney - Inner South West • Sydney - Inner West • Sydney - North Sydney and Hornsby | <ul style="list-style-type: none"> • Sydney - Northern Beaches • Sydney - Outer South West • Sydney - Outer West and Blue Mountains • Sydney - Parramatta • Sydney - Ryde • Sydney - South West • Sydney - Sutherland | <p>New South Wales</p> |
|---|--|------------------------|

Table 2. Broad Region Geography

Broad Region	Statistical Area Level	State within which the broader region is located
Central	Newcastle and Lake Macquarie SA4	New South Wales
	Hunter Valley excluding Newcastle SA4	
	New England and North West SA4	
	Far West and Orana SA4	
	Central West SA4	
Northern	Mid North Coast SA4	New South Wales
	Coffs Harbour – Grafton SA4	
	Richmond – Tweed SA4	
Southern	Illawarra SA4	New South Wales and Victoria
	Southern Highlands and Shoalhaven SA4	
	Capital Region SA4	
	Riverina SA4	
	Murray SA4	
	North West SA4	
	Bendigo SA4	
	Hume SA4	
	Shepparton SA4	
	Wellington SA3	
	Gippsland - East SA3	

CSU ECONOMIC IMPACTS

The economic impact of CSU was calculated for 2016, based on the analysis of a number of different aspects of CSU's operations and related expenditure. These included:

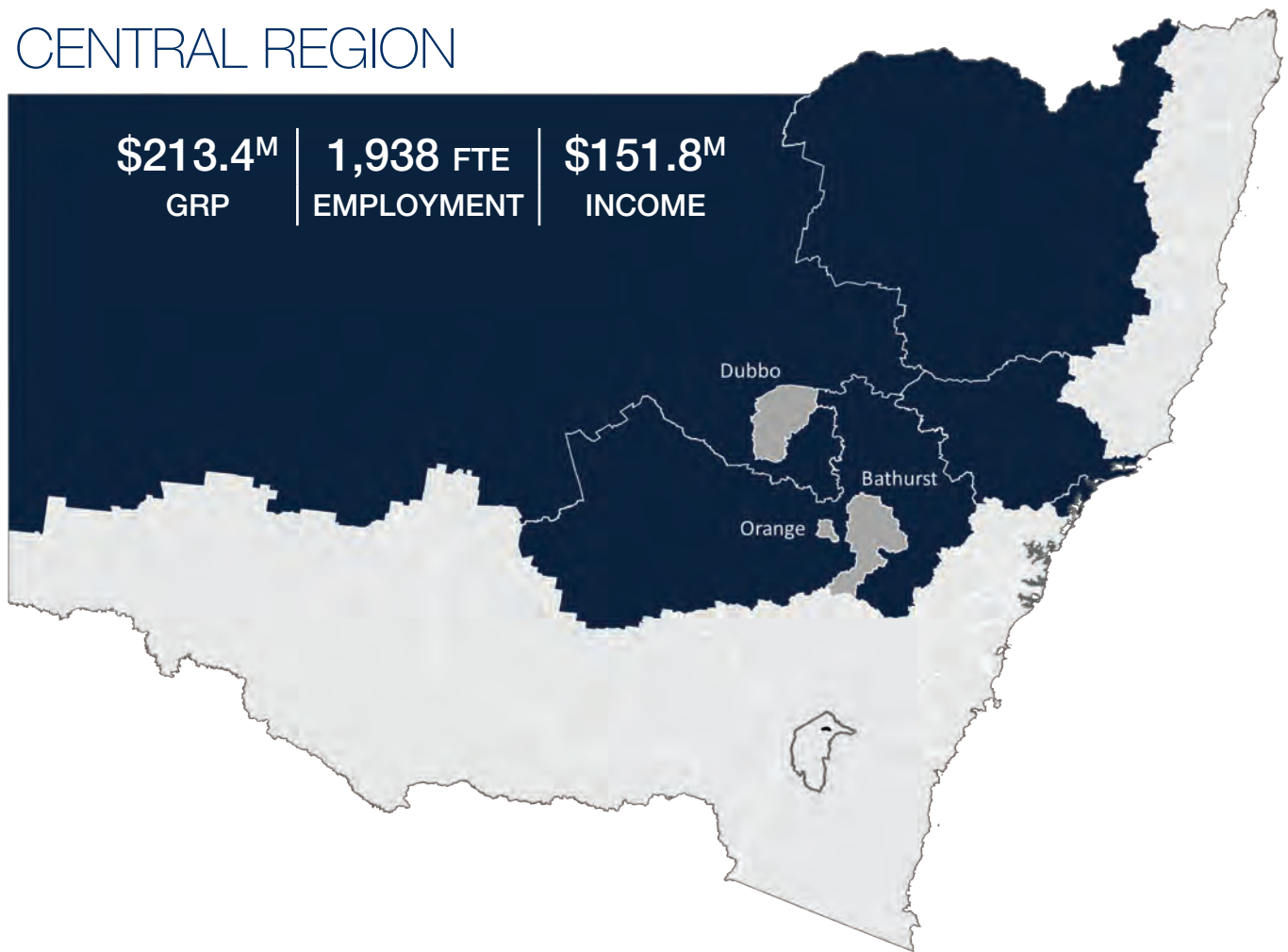
- CSU operations – CSU provided WRI with detailed information about the University's operating expenditure and income, including staff wages and the number of Full Time Equivalent (FTE) employees.
- CSU capital expenditure – CSU provided information on capital expenditure for each LGA and elsewhere in New South Wales.
- CSU student expenditure – including non-local student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies. Non-local is defined as those who have a home address outside their study region and are studying internally. Estimates of student expenditure were derived from CSU enrolment data and expenditure estimates taken from the ABS Household Expenditure Survey.

The direct economic effects of CSU and the flow-on effects on upstream industries were measured in terms of:

- Gross Regional Product – equal to gross output minus intermediate inputs. GRP, also known as 'Value added', is the difference between the costs of production (excluding the compensation of employees, gross operating surplus, taxes and imports) and the value of sales turnover.
- Household income – which measures the benefit received by regional households from economic activity. It typically refers to compensation of employees but can also include income in return for productive activity such as the gross mixed income of unincorporated enterprises, gross operating surplus on dwellings owned by the person, and property income receivable and transfers receivable such as social assistance benefits and non-life insurance claims.
- FTE employment - a measure of the workload of an employed person in a given location that makes workloads comparable across different types of employment (part-time and full-time including both permanent and casual employees). An FTE is the hours worked by one employee on a full-time basis.

It should be noted that some economic impact data presented in tables may not add up, due to rounding.

CENTRAL REGION



About Central Region

The Central Region has been created from an aggregation of SA4 regions of the Australian Statistical Geography Standard (ASGS), including:

- Central West SA4
- Far West and Orana SA4
- Hunter Valley excluding Newcastle SA4
- New England and North West SA4
- Newcastle and Lake Macquarie SA4

There are three CSU campuses within this region, namely:

- Bathurst campus
- Dubbo campus
- Orange campus

CENTRAL REGION

This section of the report examines the economic impact of a number of different aspects of CSU expenditure in the Central Region. These include; campus operations, including expenditure and employment; student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies; capital expenditure, including all expenditure on CSU assets; additional expenditure, comprised of the combined operational; and capital expenditure made by CSU campuses from outside a given region, in that region.

- Overall, CSU contributed 0.3% of GRP, 0.5% of household income and 0.4% of FTE employment in the Central Region in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade and Accommodation and food services.

\$213.4^M GRP | **1,938 FTE** EMPLOYMENT | **\$151.8^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	97.3	1,237	99.7
Flow on	116.1	701	52.1
Total	213.4	1,938	151.8

Note: Data presented may not add up due to rounding

Campus operations

\$197.5^M GRP | **1,817 FTE** EMPLOYMENT | **\$143.7^M** INCOME

- Overall, the operations of Central Region campuses contributed 0.3% of GRP, 0.5% of household income and 0.4% of FTE employment in the Central Region when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of Central Region campuses in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services.

Detailed impacts of the operations of Central Region campuses on the Central Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	91.0	1,178	96.3
Flow on	106.5	639	47.3
Total	197.5	1,817	143.7

Note: Data presented may not add up due to rounding

Student impacts

\$13.3^M GRP | **103 FTE** EMPLOYMENT | **\$6.9^M** INCOME

Of the 3,333 students studying internally at Central Region campuses, 1,607 were classified as non-local to the Central Region.

- Overall, student impacts contributed 0.02% of GRP, 0.02% of household income and 0.02% of FTE employment in the Central Region when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance and Arts and recreation services.

Detailed impacts of students on the Central Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	5.5	53	3.0
Flow on	7.8	50	3.9
Total	13.3	103	6.9

Note: Data presented may not add up due to rounding

Capital expenditure

\$2.6 ^M GRP	18 FTE EMPLOYMENT	\$1.2 ^M INCOME
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- Overall, capital expenditure by Central Region campuses contributed 0.004% of GRP, 0.004% of household income and 0.004% of FTE employment in the Central Region when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction, Manufacturing, and Professional, scientific and technical services

Detailed impacts of capital expenditure by Central Region campuses on the Central Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.8	6	0.4
Flow on	1.8	12	0.8
Total	2.6	18	1.2

Note: Data presented may not add up due to rounding

Additional expenditure

\$8.0 ^M GRP	56 FTE EMPLOYMENT	\$4.2 ^M INCOME
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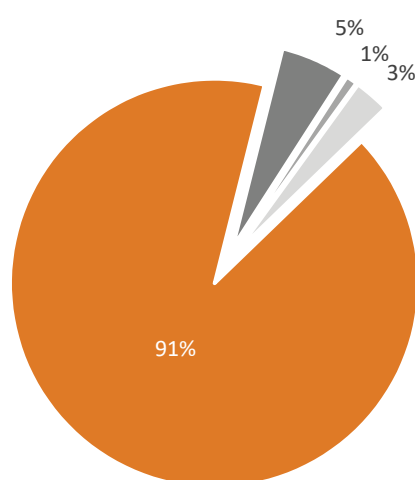
- Overall, the combined operational and capital expenditure of non-Central Region CSU campuses, made in the Central Region, contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Central Region when flow-on effects are taken into account.
- The main industry sectors impacted by non-Central Region campus expenditure in the Central Region, in terms of FTE employment were Education and training, Professional, scientific and technical services and Accommodation and food services.

Detailed impacts of additional expenditure on the Central Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	3.0	23	1.8
Flow on	5.0	33	2.3
Total	8.0	56	4.2

Note: Data presented may not add up due to rounding

CENTRAL REGION IN FOCUS



- Campus Operations
- Student Expenditure
- Capital Expenditure
- Additional Expenditure

Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Central Region at 91.1% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 5.2% of the overall FTE impact.

Student impacts

- 11,372 students were enrolled in Central Region campuses in 2016, of which 8,039 students studied by distance.
- 3,333 students studied internally in Central Region campuses in 2016, of which 1,726 (52%) were local.
- The economic impact of expenditure by internal local students attending Central Region campuses (expenditure which has not been included in the above economic impacts) has been estimated at \$24.8M in GRP, \$11.6m in household income and 175 FTE jobs to Central Region economies.

BATHURST LGA

Economic impact modelling of CSU expenditure in the Bathurst LGA has estimated that:

- Overall, CSU contributed 7.1% of GRP, 10.2% of household income and 9.3% of FTE employment in the Bathurst LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade and Accommodation and food services.

\$170.4^M GRP | **1,517 FTE** EMPLOYMENT | **\$120.1^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	82.7	978	80.4
Flow on	87.7	539	39.7
Total	170.4	1,517	120.1

Note: Data presented may not add up due to rounding

Campus operations

\$147.8^M GRP | **1,348 FTE** EMPLOYMENT | **\$109.4^M** INCOME

- Overall, the operations of the Bathurst campus contributed 6.2% of GRP, 9.3% of household income and 8.3% of FTE employment in the Bathurst LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Bathurst campus in terms of FTE employment were Health care and social assistance, Retail trade and Accommodation and food services

Detailed impacts of the operations of Bathurst campus on the Bathurst LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	72.3	885	75.3
Flow on	75.5	463	34.1
Total	147.8	1,348	109.4

Note: Data presented may not add up due to rounding

Student impact

\$21.1^M GRP | **160 FTE** EMPLOYMENT | **\$10.1^M** INCOME

Of the 2,577 students studying internally at the Bathurst campus, 2,129 were classified as non-local to the Bathurst LGA.

- Overall, student impacts contributed 0.9% of GRP, 0.8% of household income and 1.0% of FTE employment in the Bathurst LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Bathurst LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	9.9	90	5.0
Flow on	11.3	70	5.2
Total	21.1	160	10.1

Note: Data presented may not add up due to rounding

Capital expenditure

\$1.4^M GRP | 9 FTE EMPLOYMENT | \$0.6^M INCOME

- Overall, capital expenditure by the Bathurst campus contributed 0.1% of GRP, 0.1% of household income and 0.1% of FTE employment in the Bathurst LGA when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction, Information media and telecommunications, and Manufacturing.

Detailed impacts of capital expenditure by the Bathurst campus on the Bathurst LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.5	3	0.2
Flow on	0.9	6	0.4
Total	1.4	9	0.6

Note: Data presented may not add up due to rounding

Additional expenditure

\$4.1^M GRP | 28 FTE EMPLOYMENT | \$2.1^M INCOME

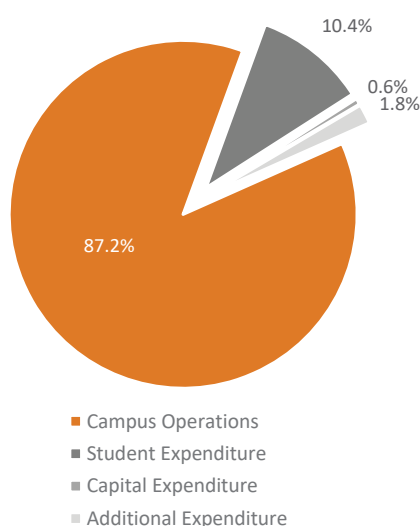
- Overall, the combined operational and capital expenditure of other CSU campuses in the Bathurst LGA contributed 0.2% of GRP, 0.2% of household income and 0.2% of FTE employment in the Bathurst LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Construction, Accommodation and food services, and Education and training.

Detailed impacts of additional expenditure on the Bathurst LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.6	12	0.9
Flow on	2.5	16	1.2
Total	4.1	28	2.1

Note: Data presented may not add up due to rounding

BATHURST LGA IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Bathurst LGA at 87.2% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 10.4% of the overall FTE impact.

Student impacts

- 10,142 students were enrolled at the Bathurst campus in 2016, of which 7,565 students studied by distance.
- 2,577 students studied internally at Bathurst campus in 2016, of which 448 (17%) were local.
- The economic impact of expenditure by internal local students attending the Bathurst campus (expenditure which has not been included in the above economic impacts) has been estimated at \$5.7M in GRP, \$2.6M in household income and 42 FTE jobs in the Bathurst economy

DUBBO REGIONAL LGA

Economic impact modelling of CSU expenditure in the Dubbo Regional LGA has estimated that:

- Overall, CSU contributed 0.3% of GRP, 0.6% of household income and 0.5% of FTE employment in the Dubbo Regional LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services.

\$8.4 GRP | **107 FTE** EMPLOYMENT | **\$8.1^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	2.2	68	5.3
Flow on	6.2	38	2.8
Total	8.4	107	8.1

Note: Data presented may not add up due to rounding

Campus operations

\$7.2^M GRP | **98 FTE** EMPLOYMENT | **\$7.5^M** INCOME

- Overall, the operations of the Dubbo campus contributed 0.2% of GRP, 0.5% of household income and 0.5% of FTE employment in the Dubbo Regional LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Dubbo campus in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services

Detailed impacts of the operations of the Dubbo campus on the Dubbo LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.7	64	5.0
Flow on	5.5	34	2.5
Total	7.2	98	7.5

Note: Data presented may not add up due to rounding

Student impacts

\$0.9^M GRP | **6 FTE** EMPLOYMENT | **\$0.4^M** INCOME

Of the 202 students studying internally at the Dubbo campus, 72 were classified as non-local to the Dubbo Regional LGA.

- Overall, student impacts contributed 0.03% of GRP, 0.03% of household income and 0.03% of FTE employment in the Dubbo Regional LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Dubbo Regional LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.4	3	0.2
Flow on	0.5	3	0.2
Total	0.9	6	0.4

Note: Data presented may not add up due to rounding

Capital expenditure

\$0.4 ^M GRP	3 FTE EMPLOYMENT	\$0.2 ^M INCOME
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- Overall, capital expenditure by the Dubbo campus contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Dubbo Regional LGA when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction, Manufacturing and Health care and social assistance.

Detailed impacts of capital expenditure by the Dubbo campus on the Dubbo Regional LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.1	1	0.0
Flow on	0.3	2	0.1
Total	0.4	3	0.2

Note: Data presented may not add up due to rounding

Additional expenditure

\$0.3 ^M GRP	2 FTE EMPLOYMENT	\$0.2 ^M INCOME
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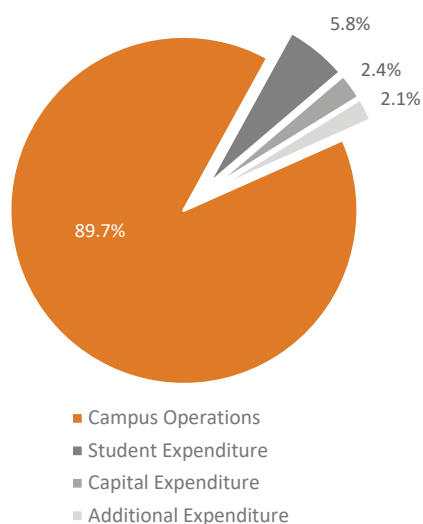
- Overall, the combined operational and capital expenditure of other CSU campuses in the Dubbo Regional LGA contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Dubbo Regional LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Accommodation and food services, Manufacturing and Education and training.

Detailed impacts of additional expenditure on the Dubbo Regional LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.1	1	0.1
Flow on	0.2	1	0.1
Total	0.3	2	0.2

Note: Data presented may not add up due to rounding

DUBBO REGIONAL LGA IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Dubbo Regional LGA at 89.7% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 5.8% of the overall FTE impact.

Student impacts

- 283 students were enrolled at the Dubbo campus in 2016, of which 81 students studied by distance.
- 202 students studied internally at the Dubbo campus in 2016, of which 130 (64%) were local.
- The economic impact of expenditure by internal local students attending the Dubbo campus (expenditure which has not been included in the above economic impacts) has been estimated at \$1.7M in GRP, \$0.8M in household income and 12 FTE jobs in the Dubbo economy.

ORANGE LGA

Economic impact modelling of CSU expenditure in the Orange LGA has estimated that:

- Overall, CSU contributed 1.6% of GRP, 2.1% of household income and 2.2% of FTE employment in the Orange LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade and Accommodation and food services.

\$41.6^M GRP | **390 FTE** EMPLOYMENT | **\$28.3^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	18.9	247	17.0
Flow on	22.7	143	11.3
Total	41.6	390	28.3

Note: Data presented may not add up due to rounding

Campus operations

\$36.9^M GRP | **355 FTE** EMPLOYMENT | **\$25.9^M** INCOME

- Overall, the operations of the Orange campus contributed 1.4% of GRP, 1.9% of household income and 2.0% of FTE employment in the Orange LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Orange campus in terms of FTE employment were Health care and social assistance, Retail trade and Accommodation and food services.

Detailed impacts of the operations of the Orange campus on the Orange LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	16.9	229	16.0
Flow on	20.0	126	9.9
Total	36.9	355	25.9

Note: Data presented may not add up due to rounding

Student impacts

\$4.7^M GRP | **35 FTE** EMPLOYMENT | **\$2.4^M** INCOME

Of the 554 students studying internally at the Orange campus, 512 were classified as non-local to the Orange LGA.

- Overall, student impacts contributed 0.2% of GRP, 0.2% of household income and 0.2% of FTE employment in the Orange LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Orange LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.9	18	1.0
Flow on	2.7	17	1.3
Total	4.7	35	2.4

Note: Data presented may not add up due to rounding

Capital expenditure

No capital expenditure was reported by the Orange campus in 2016.

Additional expenditure

\$3.0 ^M GRP	21 FTE EMPLOYMENT	\$1.7 ^M INCOME
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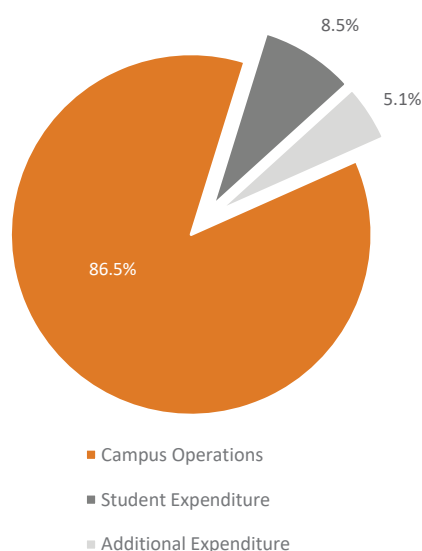
- Overall, the combined operational and capital expenditure of other CSU campuses in the Orange LGA contributed 0.1% of GRP, 0.1% of household income and 0.1% of FTE employment in the Orange LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Education and training, Professional, scientific and technical services, Health care and social assistance.

Detailed impacts of additional expenditure on the Orange LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.2	9	0.8
Flow on	1.9	12	0.9
Total	3.0	21	1.7

Note: Data presented may not add up due to rounding

ORANGE LGA IN FOCUS



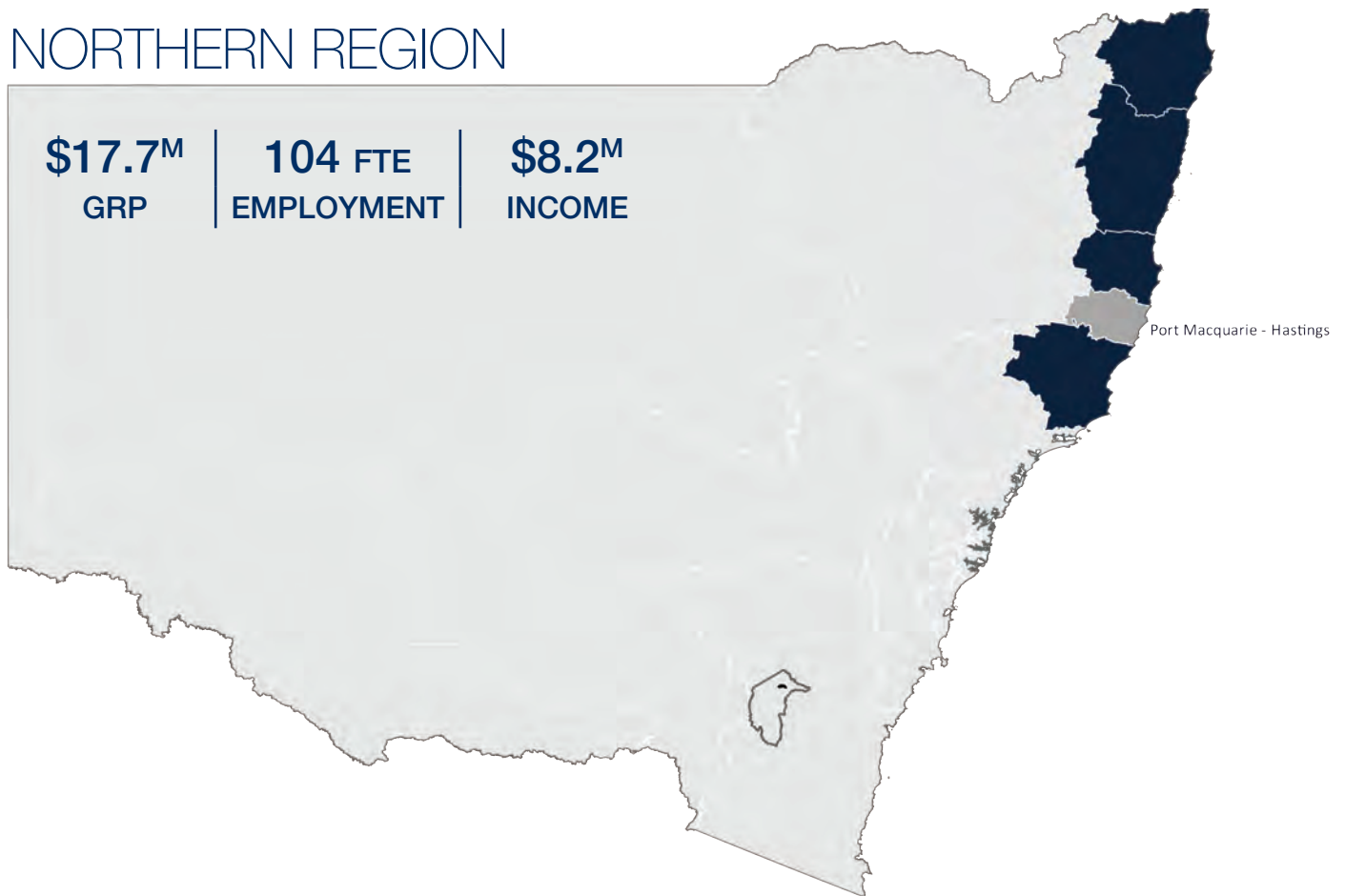
Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Orange LGA at 86.5% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 8.5% of the overall FTE impact.

Student impacts

- 947 students were enrolled at the Orange campus in 2016, of which 393 students studied by distance.
- 554 students studied internally at the Orange campus in 2016, of which 42 (8%) were local.
- The economic impact of expenditure by internal local students attending the Orange campus (expenditure which has not been included in the above economic impacts) has been estimated at \$0.6M in GRP, \$0.3M in household income and 4 FTE jobs in the Orange LGA economy.

NORTHERN REGION



ABOUT NORTHERN REGION

The Northern Region has been created from an aggregation of Statistical Area Level 4 of the ASGS, including:

- Mid North Coast SA4
- Coffs Harbour–Grafton SA4
- Richmond–Tweed SA4

The Port Macquarie campus is the only CSU campus within the Northern Region. Of note, the Port Macquarie CSU campus has been found to have larger impacts in the local LGA than in the wider Northern Region in which it resides. This is because only non-local student expenditure has been included in the calculation of economic impacts. Northern Region student expenditure is smaller as more students are considered 'local' and therefore their expenditure is not included in calculating economic impacts for that geographic region.

NORTHERN REGION

This section of the report examines the economic impact of a number of different aspects of CSU expenditure in the Northern Region. These include; campus operations, including expenditure and employment; student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies; capital expenditure, including all expenditure on CSU assets; and, additional expenditure, comprised of the combined operational and capital expenditure made by CSU campuses from outside a given region, in that region.

- Overall, CSU contributed 0.1% of GRP, 0.1% of household income and 0.1% of FTE employment in the Northern Region in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Retail trade, Health care and social assistance, and Accommodation and food services.

Campus operations

\$15.9^M GRP | **91 FTE** EMPLOYMENT | **\$7.5^M** INCOME

- Overall, the operations of Northern Region, Port Macquarie campus contributed 0.06% of GRP, 0.06% of household income and 0.05% of FTE employment in the Northern Region when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of Northern Region, Port Macquarie campus in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services

Detailed impacts of the operations of Northern Region, Port Macquarie campus on the Northern Region is provided below.

	Value Added \$m	Employment FTE	Income \$m
Initial	10.5	60	5.3
Flow on	5.4	31	2.2
Total	15.9	91	7.5

Note: Data presented may not add up due to rounding

\$17.7^M
GRP

104 FTE
EMPLOYMENT

\$8.2^M
INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	11.4	68	5.7
Flow on	6.3	37	2.6
Total	17.7	104	8.2

Note: Data presented may not add up due to rounding

Student impacts

\$1.8^M GRP | **13 FTE** EMPLOYMENT | **\$0.8^M** INCOME

Of the 513 students studying internally at the Northern Region, Port Macquarie campus, 145 were classified as non-local to the Northern Region.

- Overall, student impacts contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Northern Region when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Northern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.9	8	0.4
Flow on	0.9	6	0.4
Total	1.8	13	0.8

Note: Data presented may not add up due to rounding

Capital expenditure

Capital expenditure of less than \$500 was recorded by the Port Macquarie Campus in the Northern Region in 2016.

Additional expenditure

\$0.7^M
GRP

5 FTE
EMPLOYMENT

\$0.5^M
INCOME

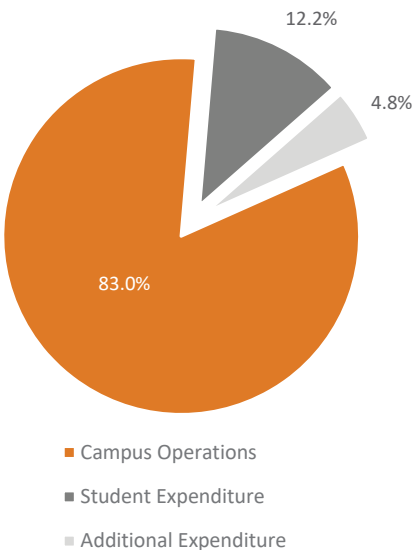
- Overall, the combined operational and capital expenditure of non-Northern Region CSU campuses, made in the Northern Region, contributed 0.003% of GRP, 0.004% of household income and 0.003% of FTE employment in the Northern Region when flow-on effects are taken into account.
- The main industry sectors impacted by non-Northern Region campus expenditure in the Northern Region, in terms of FTE employment were Accommodation and food services and Rental, hiring and real estate services.

Detailed impacts of additional expenditure on the Northern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.3	3	0.2
Flow on	0.4	2	0.3
Total	0.7	5	0.5

Note: Data presented may not add up due to rounding

NORTHERN REGION IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Northern Region at 83.0% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 12.2% of the overall FTE impact.

Student impacts

- 566 students were enrolled in Northern Region campuses in 2016, of which 53 students studied by distance.
- 513 students studied internally in Northern Region campuses in 2016, of which 368 (72%) were local.
- The economic impact of expenditure by internal local students attending the Northern Region, Port Macquarie campus (expenditure which has not been included in the above economic impacts) has been estimated at \$4.6M in GRP, \$2.0M in household income and 34 FTE jobs to Northern Region economies.

PORT MACQUARIE-HASTINGS LGA

Economic impact modelling of CSU expenditure in the Port Macquarie-Hastings LGA has estimated that:

- Overall, CSU contributed 0.5% of GRP 0.5% of household income and 0.5% of FTE employment in the Port Macquarie-Hastings LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Retail trade, Health care and social assistance, Accommodation and food services.

\$19.4^M
GRP

115 FTE
EMPLOYMENT

\$9.0^M
INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	12.3	74	6.1
Flow on	7.1	40	2.9
Total	19.4	115	9.0

Note: Data presented may not add up due to rounding

Campus operations

\$15.9^M
GRP

91 FTE
EMPLOYMENT

\$7.5^M
INCOME

- Overall, the operations of the Port Macquarie campus contributed 0.4% of GRP, 0.4% of household income and 0.4% of FTE employment in the Port Macquarie-Hastings LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Port Macquarie campus in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services.

Detailed impacts of the operations of the Port Macquarie campus on the Port Macquarie-Hastings LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	10.5	60	5.3
Flow on	5.4	31	2.2
Total	15.9	91	7.5

Note: Data presented may not add up due to rounding

Student impacts

\$3.5^M
GRP

24 FTE
EMPLOYMENT

\$1.5^M
INCOME

Of the 513 students studying internally at the Port Macquarie campus, 271 were classified as non-local to the Port Macquarie-Hastings LGA.

- Overall, student impacts contributed 0.1% of GRP, 0.1% of household income and 0.1% of FTE employment in the Port Macquarie-Hastings LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Port Macquarie-Hastings LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.7	14	0.8
Flow on	1.7	10	0.7
Total	3.5	24	1.5

Note: Data presented may not add up due to rounding

Capital expenditure

No capital expenditure recorded by the Port Macquarie Campus in the Port Macquarie-Hastings LGA in 2016.

Additional expenditure

\$0.4^M
GRP

3 FTE
EMPLOYMENT

\$0.2^M
INCOME

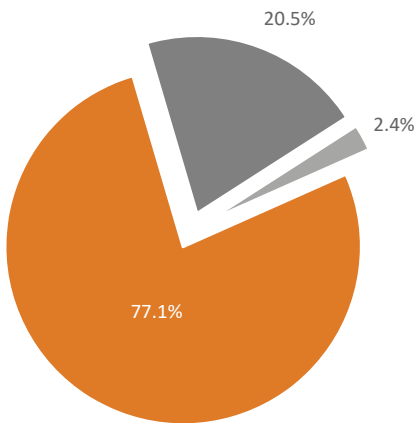
- Overall, the combined operational and capital expenditure of other CSU campuses in the Port Macquarie-Hastings LGA contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Port Macquarie-Hastings LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Accommodation and food services and Rental, hiring and real estate services.

Detailed impacts of additional expenditure on the Port Macquarie-Hastings LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.2	2	0.1
Flow on	0.2	1	0.1
Total	0.4	3	0.2

Note: Data presented may not add up due to rounding

PORT MACQUARIE-HASTINGS LGA IN FOCUS



- Campus Operations
- Student Expenditure
- Additional Expenditure

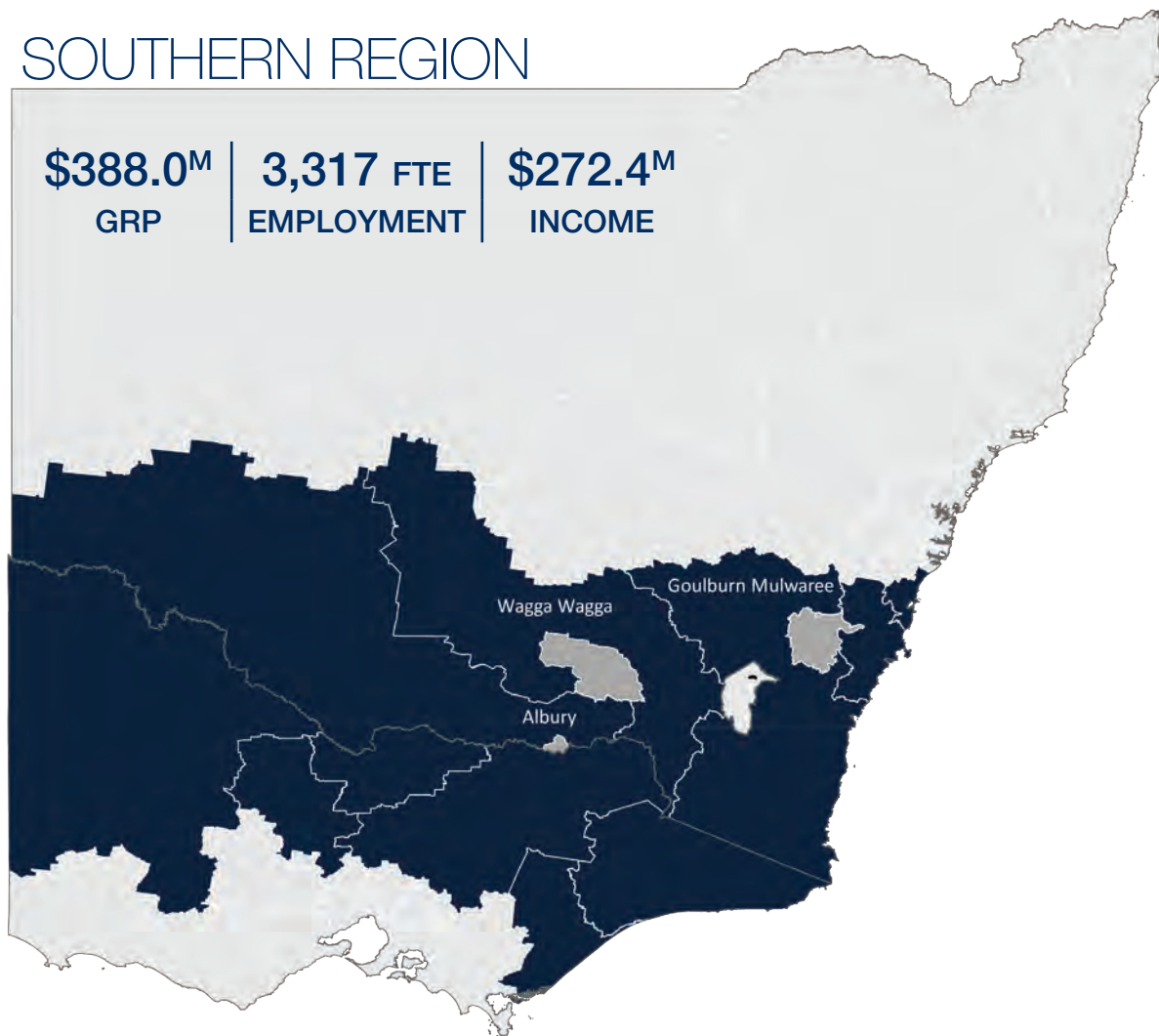
Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Port Macquarie-Hastings LGA at 77.1% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 20.5% of the overall FTE impact.

Student impacts

- 566 students were enrolled at the Port Macquarie campus in 2016, of which 53 students studied by distance.
- 513 students studied internally at the Port Macquarie campus in 2016, of which 242 (47%) were local.
- The economic impact of expenditure by internal local students attending the Port Macquarie campus (expenditure which has not been included in the above economic impacts) has been estimated at \$3.0M in GRP, \$1.3M in household income and 21 FTE jobs in the Port Macquarie-Hastings LGA economy.

SOUTHERN REGION



ABOUT SOUTHERN REGION

The Southern Region has been created from an aggregation of SA4 and SA3 regions of the ASGS, including:

- Illawarra SA4
- Southern Highlands and Shoalhaven SA4
- Capital Region SA4
- Riverina SA4
- Murray SA4
- North West SA4
- Bendigo SA4
- Hume SA4
- Shepparton SA4
- Wellington SA3
- Gippsland-East SA3

There are three CSU campuses within this region, namely:

- Albury campus
- Goulburn campus
- Wagga Wagga campus

SOUTHERN REGION

This section of the report examines the economic impact of a number of different aspects of CSU expenditure in the Southern Region. These include; campus operations, including expenditure and employment; student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies; capital expenditure, including all expenditure on CSU assets; and additional expenditure, comprised of the combined operational and capital expenditure made by CSU campuses from outside a given region, in that region.

- Overall, CSU contributed 0.4% of GRP, 0.7% of household income and 0.6% of FTE employment in the Southern Region in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Education and training, and Retail trade.

\$388.0^M | **3,317 FTE** | **\$272.4^M**
GRP | EMPLOYMENT | INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	171.2	1,922	162.3
Flow on	216.7	1,394	110.1
Total	388.0	3,317	272.4

Note: Data presented may not add up due to rounding

Campus operations

\$353.6^M | **3,072 FTE** | **\$254.5^M**
GRP | EMPLOYMENT | INCOME

- Overall, the operations of Southern Region campuses contributed 0.4% of GRP, 0.7% of household income and 0.5% of FTE employment in the Southern Region when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of Southern Region campuses in terms of FTE employment were Health care and social assistance, Education and training, and Retail trade.

Detailed impacts of the operations of Southern Region campuses on the Southern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	157.7	1,807	154.9
Flow on	195.9	1,265	99.6
Total	353.6	3,072	254.5

Note: Data presented may not add up due to rounding

Student impacts

\$28.5^M | **204 FTE** | **\$15.3^M**
GRP | EMPLOYMENT | INCOME

Of the 5,349 students studying internally at Southern Region campuses, 2,541 were classified as non-local to the Southern Region.

- Overall, student impacts contributed 0.03% of GRP, 0.04% of household income and 0.03% of FTE employment in the Southern Region when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Southern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	11.8	101	6.6
Flow on	16.7	103	8.7
Total	28.5	204	15.3

Note: Data presented may not add up due to rounding

Capital expenditure

\$5.9^M GRP | 41 FTE EMPLOYMENT | \$2.6^M INCOME

- Overall, capital expenditure by Southern Region campuses contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Southern Region when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction, Manufacturing, and Professional, scientific and technical services

Detailed impacts of capital expenditure by Southern Region campuses on the Southern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.7	14	0.8
Flow on	4.2	27	1.8
Total	5.9	41	2.6

Note: Data presented may not add up due to rounding

Additional expenditure

\$25.7^M GRP | 167 FTE EMPLOYMENT | \$13.0^M INCOME

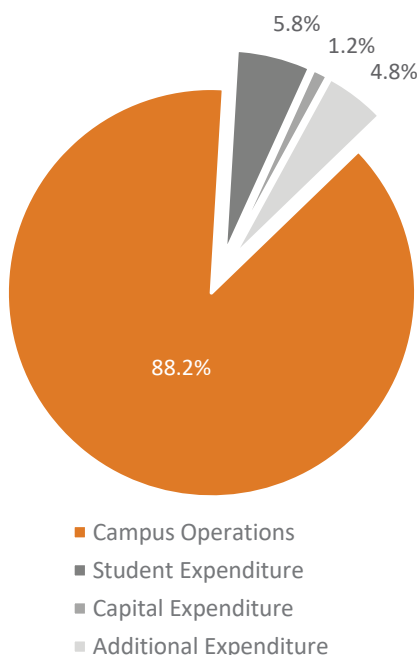
- Overall, the combined operational and capital expenditure of non-Southern Region CSU campuses, made in the Southern Region, contributed 0.03% of GRP, 0.03% of household income and 0.03% of FTE employment in the Southern Region when flow-on effects are taken into account.
- The main industry sectors impacted by non-Southern Region campus expenditure in the Southern Region, in terms of FTE employment were Construction, Manufacturing, and Wholesale trade.

Detailed impacts of additional expenditure on the Southern Region are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	8.5	65	4.9
Flow on	17.3	103	8.1
Total	25.7	167	13.0

Note: Data presented may not add up due to rounding

SOUTHERN REGION IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Southern Region at 88.2% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 5.8% of the overall FTE impact.

Student impacts

- 20,189 students were enrolled in Southern Region campuses in 2016, of which 14,840 students studied by distance.
- 5,349 students studied internally in Southern Region campuses in 2016, of which 2,808 (52%) were local.
- The economic impact of expenditure by internal local students attending Southern Region campuses (expenditure which has not been included in the above economic impacts) has been estimated at \$42.8M in GRP, \$22.5M in household income and 297 FTE jobs to Southern Region economies.

ALBURY LGA

Economic impact modelling of CSU expenditure in the Albury LGA has estimated that:

- Overall, CSU contributed 2.8% of GRP, 4.1% of household income and 3.7% of FTE employment in the Albury LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade, and Education and training.

\$93.2^M GRP | **844 FTE** EMPLOYMENT | **\$66.8^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	38.5	487	40.9
Flow on	54.7	357	25.9
Total	93.2	844	66.8

Note: Data presented may not add up due to rounding

Campus operations

\$79.7^M GRP | **745 FTE** EMPLOYMENT | **\$60.4^M** INCOME

- Overall, the operations of the Albury campus contributed 2.4% of GRP, 3.7% of household income and 3.2% of FTE employment in the Albury LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Albury campus in terms of FTE employment were Health care and social assistance, Retail trade, and Education and training.

Detailed impacts of the operations of Albury campus on the Albury LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	32.9	438	38.1
Flow on	46.8	307	22.2
Total	79.7	745	60.4

Note: Data presented may not add up due to rounding

Student impacts

\$12.4^M GRP | **91 FTE** EMPLOYMENT | **\$5.9^M** INCOME

Of the 1,497 students studying internally at the Albury campus, 983 were classified as non-local to the Albury LGA.

- Overall, student impacts contributed 0.4% of GRP, 0.4% of household income and 0.4% of FTE employment in the Albury LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Albury LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	5.3	47	2.6
Flow on	7.1	45	3.3
Total	12.4	91	5.9

Note: Data presented may not add up due to rounding

Capital expenditure

\$1.1 ^M GRP	8 FTE EMPLOYMENT	\$0.5 ^M INCOME
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- Overall, capital expenditure by the Albury campus contributed 0.03% of GRP, 0.03% of household income and 0.04% of FTE employment in the Albury LGA when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction, Manufacturing, and Health care and social assistance.

Detailed impacts of capital expenditure by the Albury campus on the Albury LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.3	2	0.1
Flow on	0.9	6	0.4
Total	1.1	8	0.5

Note: Data presented may not add up due to rounding

Additional expenditure

\$14.4 ^M GRP	104 FTE EMPLOYMENT	\$7.2 ^M INCOME
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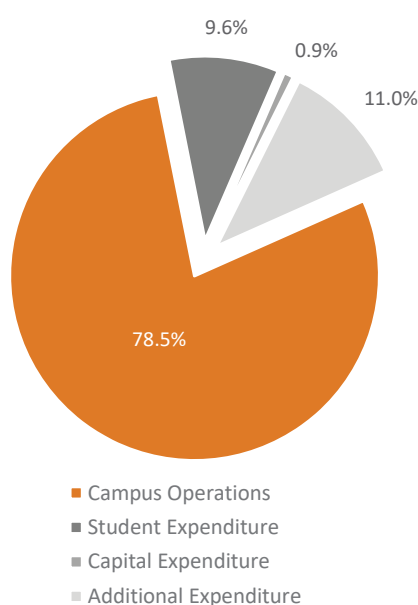
- Overall, the combined operational and capital expenditure of other CSU campuses in the Albury LGA contributed 0.4% of GRP, 0.4% of household income and 0.5% of FTE employment in the Albury LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Construction, Health care and social assistance, and Manufacturing.

Detailed impacts of additional expenditure on the Albury LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	3.8	34	2.1
Flow on	10.6	70	5.1
Total	14.4	104	7.2

Note: Data presented may not add up due to rounding

ALBURY LGA IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Albury LGA at 78.5% of the overall employment impacts.
- Additional (non-Albury campus) expenditure, the second largest contributor to FTE employment, made up 11.0% of the overall FTE impact.

Student impacts

- 3,593 students were enrolled at the Albury campus in 2016, of which 2,096 students studied by distance.
- 1,497 students studied internally at the Albury campus in 2016, of which 514 (34%) were local.
- The economic impact of expenditure by internal local students attending the Albury campus (expenditure which has not been included in the above economic impacts) has been estimated at \$7.1M in GRP, \$3.4M in household income and 52 FTE jobs in the Albury LGA economy.

GOULBURN MULWAREE LGA

Economic impact modelling of CSU expenditure in the Goulburn Mulwaree LGA has estimated that:

- Overall, CSU contributed 1.6% of GRP, 1.4% of household income and 1.4% of FTE employment in the Goulburn Mulwaree LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Retail trade, Health care and social assistance, and Accommodation and food services.

\$26.3^M GRP | **156 FTE** EMPLOYMENT | **\$12.3^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	16.3	96	7.4
Flow on	10.0	60	4.9
Total	26.3	156	12.3

Note: Data presented may not add up due to rounding

Campus operations

\$16.8^M GRP | **90 FTE** EMPLOYMENT | **\$7.5^M** INCOME

- Overall, the operations of the Goulburn campus contributed 1.0% of GRP, 0.9% of household income and 0.8% of FTE employment in the Goulburn Mulwaree LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Goulburn campus in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services.

Detailed impacts of the operations of Goulburn campus on the Goulburn Mulwaree LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	11.9	60	5.1
Flow on	5.0	30	2.4
Total	16.8	90	7.5

Note: Data presented may not add up due to rounding

Student impacts

\$9.5^M GRP | **66 FTE** EMPLOYMENT | **\$4.8^M** INCOME

Of the 730 students studying internally at Goulburn campus, 725 were classified as non-local to the Goulburn Mulwaree LGA.

- Overall, student impacts contributed 0.6% of GRP, 0.6% of household income and 0.6% of FTE employment in the Goulburn Mulwaree LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Goulburn Mulwaree LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	4.4	36	2.3
Flow on	5.1	30	2.5
Total	9.5	66	4.8

Note: Data presented may not add up due to rounding

Capital expenditure

No capital expenditure recorded by the Goulburn Campus in the Goulburn Mulwaree LGA in 2016.

Additional expenditure

\$0.1 ^M GRP	0.5 FTE EMPLOYMENT	\$0.04 ^M INCOME
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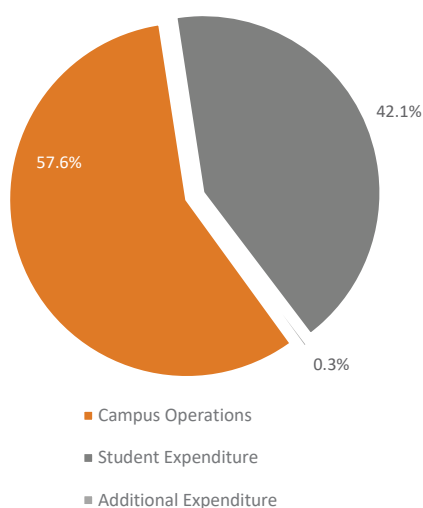
- Overall, the combined operational and capital expenditure of other CSU campuses in the Goulburn Mulwaree LGA provided minimal economic impacts.

Detailed impacts of additional expenditure on the Goulburn Mulwaree LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.0	0.3	0.0
Flow on	0.0	0.2	0.0
Total	0.1	0.5	0.04

Note: Data presented may not add up due to rounding

GOULBURN MULWAREE LGA IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Goulburn Mulwaree LGA at 57.6% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 42.1% of the overall FTE impact.

Student impacts

- 3,420 students were enrolled at the Goulburn campus in 2016, of which 2,690 students studied by distance.
- 730 students studied internally at the Goulburn campus in 2016, of which 5 (1%) were local.
- The economic impact of expenditure by the five internal local students attending the Goulburn campus was minimal.

WAGGA WAGGA LGA

Economic impact modelling of CSU expenditure in the Wagga Wagga LGA has estimated that:

- Overall, CSU contributed 6.6% of GRP, 8.5% of household income and 8.3% of FTE employment in the Wagga Wagga LGA in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services.

\$280.7^M GRP | **2,371 FTE** EMPLOYMENT | **\$198.3^M** INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	124.3	1,406	118.0
Flow on	156.4	965	80.3
Total	280.7	2,371	198.3

Note: Data presented may not add up due to rounding

Campus operations

\$253.2^M GRP | **2,174 FTE** EMPLOYMENT | **\$183.5^M** INCOME

- Overall, the operations of the Wagga Wagga campus contributed 6.0% of GRP, 7.9% of household income and 7.6% of FTE employment in the Wagga Wagga LGA when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of the Wagga Wagga campus in terms of FTE employment were Health care and social assistance, Retail trade, and Accommodation and food services

Detailed impacts of the operations of the Wagga Wagga campus on the Wagga Wagga LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	112.9	1,309	111.7
Flow on	140.2	865	71.8
Total	253.2	2,174	183.5

Note: Data presented may not add up due to rounding

Student impacts

\$27.1^M GRP | **194 FTE** EMPLOYMENT | **\$14.6^M** INCOME

Of the 3,122 students studying internally at the Wagga Wagga campus, 2,453 were classified as non-local to the Wagga Wagga LGA.

- Overall, student impacts contributed 0.6% of GRP, 0.6% of household income and 0.7% of FTE employment in the Wagga Wagga LGA when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Arts and recreation services.

Detailed impacts of students on the Wagga Wagga LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	11.2	96	6.3
Flow on	15.9	98	8.3
Total	27.1	194	14.6

Note: Data presented may not add up due to rounding

Capital expenditure

\$0.5 ^M GRP	3 FTE EMPLOYMENT	\$0.3 ^M INCOME
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- Overall, capital expenditure by the Wagga Wagga campus contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the Wagga Wagga LGA when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Manufacturing, Construction, Health care and social assistance.

Detailed impacts of capital expenditure by the Wagga Wagga campus on the Wagga Wagga LGA are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.1	1	0.1
Flow on	0.3	2	0.2
Total	0.5	3	0.3

Note: Data presented may not add up due to rounding

Additional expenditure

\$13.0 ^M GRP	82 FTE EMPLOYMENT	\$7.3 ^M INCOME
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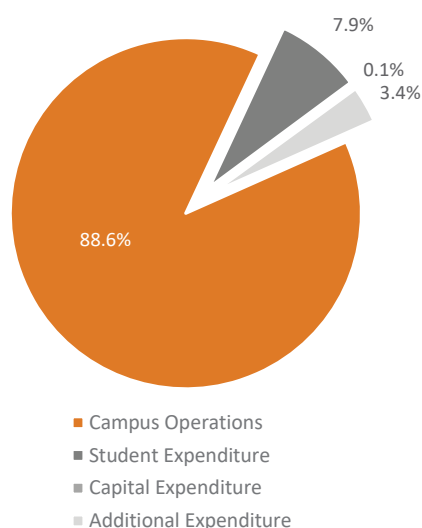
- Overall, the combined operational and capital expenditure of other CSU campuses in the Wagga Wagga LGA contributed 0.3% of GRP, 0.3% of household income and 0.3% of FTE employment in the Wagga Wagga LGA when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Education and training, Health care and social assistance, and Manufacturing.

Detailed impacts of additional expenditure on the Wagga Wagga LGA are provided below

	GRP \$m	Employment FTE	Income \$m
Initial	5.2	34	3.3
Flow on	7.7	48	4.0
Total	13.0	82	7.3

Note: Data presented may not add up due to rounding

WAGGA WAGGA LGA IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the Wagga Wagga LGA at 88.6% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 7.9% of the overall FTE impact.

Student impacts

- 13,176 students were enrolled at the Wagga Wagga campus in 2016, of which 10,054 students studied by distance.
- 3,122 students studied internally at the Wagga Wagga campus in 2016, of which 669 (21%) were local.
- The economic impact of expenditure by internal local students attending the Wagga Wagga campus (expenditure which has not been included in the above economic impacts) has been estimated at \$9.6M in GRP, \$5.0M in household income and 67 FTE jobs in the Wagga Wagga LGA economy.

AUSTRALIAN CAPITAL TERRITORY



ABOUT THE AUSTRALIAN CAPITAL TERRITORY

CSU's facilities in the Australian Capital Territory (ACT) are comprised of:

- Canberra Study Centre
- Canberra Institute of Technology

AUSTRALIAN CAPITAL TERRITORY

This section of the report examines the economic impact of a number of different aspects of CSU expenditure in the ACT. These include; campus operations, including expenditure and employment; student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies; capital expenditure, including all expenditure on CSU assets; and additional expenditure, comprised of the combined operational and capital expenditure made by CSU campuses from outside a given region, in that region.

- Overall, CSU contributed 0.03% of GRP, 0.05% of household income and 0.05% of FTE employment in the ACT in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Retail trade, Health care and social assistance, and Professional, scientific and technical services.

\$12.0^M
GRP

99 FTE
EMPLOYMENT

\$10.4^M
INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	2.1	47	5.2
Flow on	9.9	52	5.2
Total	12.0	99	10.4

Note: Data presented may not add up due to rounding

Campus operations

\$7.6^M
GRP

74 FTE
EMPLOYMENT

\$8.1^M
INCOME

- Overall, the operations of ACT campuses contributed 0.02% of GRP, 0.04% of household income and 0.03% of FTE employment in the ACT when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of ACT campuses in terms of FTE employment were Accommodation and food services, Health care and social assistance, and Education and training.

Detailed impacts of the operations of ACT campuses on the ACT economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.5	37	4.4
Flow on	7.1	37	3.7
Total	7.6	74	8.1

Note: Data presented may not add up due to rounding

Student impacts

\$3.7^M
GRP

21 FTE
EMPLOYMENT

\$1.9^M
INCOME

Of the 214 students studying internally at ACT campuses, 142 were classified as non-local to the ACT.

- Overall, student impacts contributed 0.01% of GRP, 0.01% of household income and 0.01% of FTE employment in the ACT when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Professional, scientific and technical services.

Detailed impacts of students on the ACT economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	1.4	9	0.7
Flow on	2.3	12	1.2
Total	3.7	21	1.9

Note: Data presented may not add up due to rounding

Capital expenditure

\$0.7^M GRP | 4 FTE EMPLOYMENT | \$0.4^M INCOME

- Overall, capital expenditure by ACT campuses contributed 0.002% of GRP, 0.002% of household income and 0.002% of FTE employment in the ACT economy when flow-on effects are taken into account.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction and Professional, scientific and technical services

Detailed impacts of capital expenditure by ACT campuses on the ACT economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.1	1	0.1
Flow on	0.5	3	0.3
Total	0.7	4	0.4

Note: Data presented may not add up due to rounding

Additional expenditure

\$12.4^M GRP | 67 FTE EMPLOYMENT | \$7.3^M INCOME

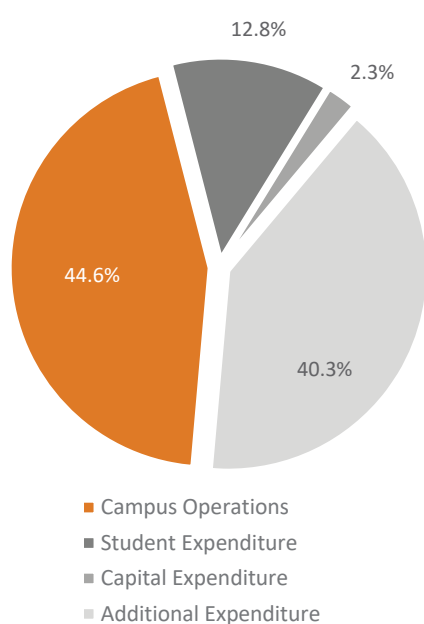
- Overall, the combined operational and capital expenditure of non-ACT CSU campuses, made in the ACT, contributed 0.03% of GRP, 0.03% of household income and 0.03% of FTE employment in the ACT when flow-on effects are taken into account.
- The main industry sectors impacted by non-ACT campus expenditure in terms of FTE employment were Education and training, Professional, scientific and technical services, and Accommodation and food services.

Detailed impacts of additional expenditure on the ACT economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	3.8	21	2.8
Flow on	8.6	46	4.5
Total	12.4	67	7.3

Note: Data presented may not add up due to rounding

ACT IN FOCUS



Employment impacts

- Campus operations generated the largest contribution to FTE employment in the ACT at 44.6% of the overall employment impacts.
- Additional (non-ACT campus) expenditure, the second largest contributor to FTE employment, made up 40.3% of the overall FTE impact.

Student impacts

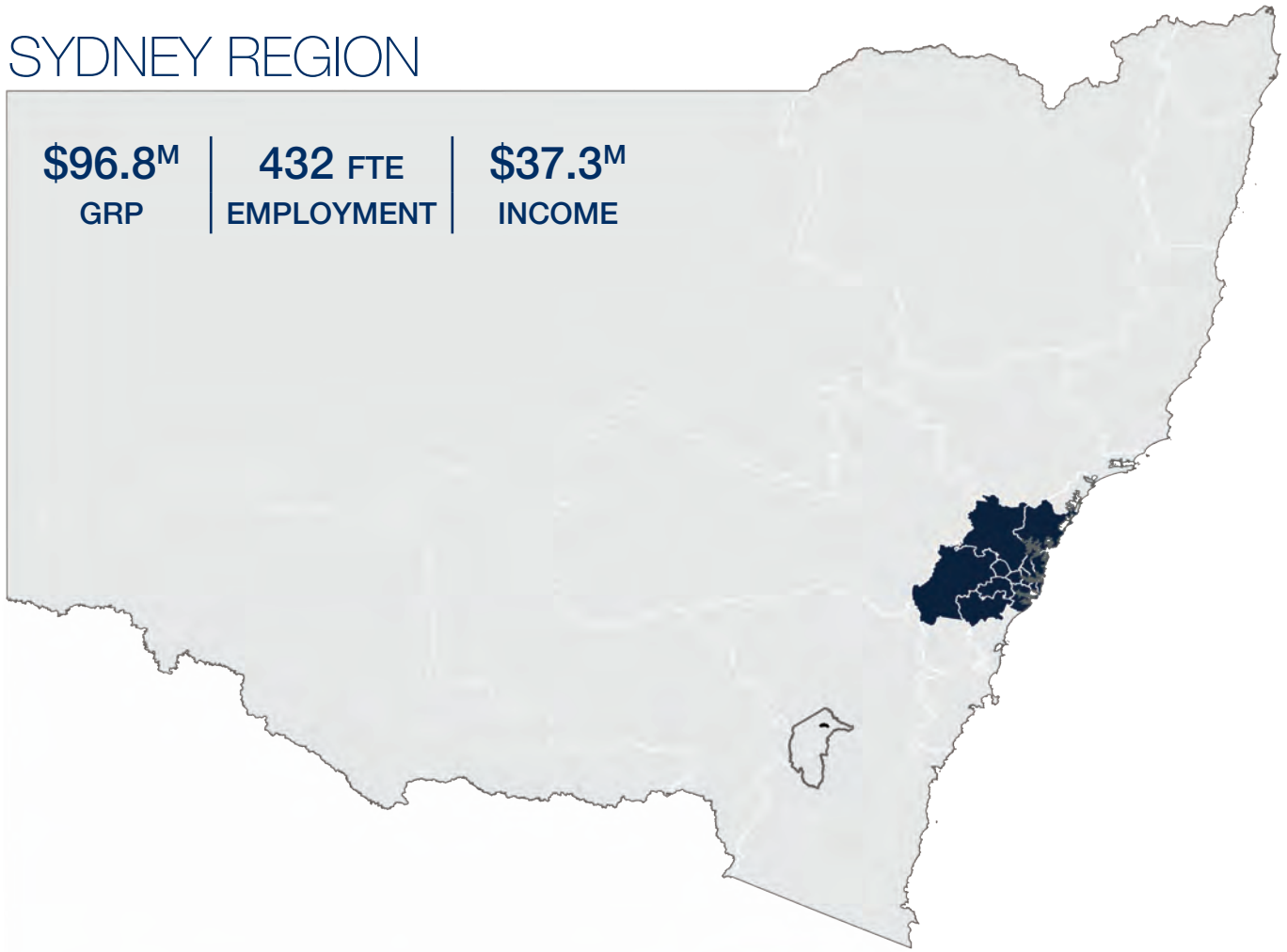
- 630 students were enrolled at the ACT campuses in 2016, of which 416 students studied by distance.
- 214 students studied internally at ACT campuses in 2016, of which 72 (34%) were local.
- The economic impact of expenditure by internal local students attending ACT campuses (expenditure which has not been included in the above economic impacts) has been estimated at \$1.9M in GRP, \$1.0M in household income and 11 FTE jobs in the ACT economy.

SYDNEY REGION

\$96.8^M
GRP

432 FTE
EMPLOYMENT

\$37.3^M
INCOME



ABOUT THE SYDNEY REGION

The Sydney Region has been created from an aggregation of SA4 regions of the ASGS, including:

- Central Coast
- Sydney-Baulkham Hills and Hawkesbury
- Sydney-Blacktown
- Sydney-City and Inner South
- Sydney-Eastern Suburbs
- Sydney-Inner South West
- Sydney-Inner West
- Sydney-North Sydney and Hornsby
- Sydney-Northern Beaches
- Sydney-Outer South West
- Sydney-Outer West and Blue Mountains
- Sydney-Parramatta

CSU's facilities in the Sydney region comprise:

- CSU Study Centre Sydney
- Centre for Islamic Studies and Civilisation
- United Theological College
- Australian Federal Policy Department (Manly)
- Northern Sydney Institute

SYDNEY REGION

This section of the report examines the economic impact of a number of different aspects of CSU expenditure in the Sydney Region. These include; campus operations, including expenditure and employment; student impacts, including student expenditure and the expenditure of friends and families attending the region for student graduation ceremonies; capital expenditure, including all expenditure on CSU assets; and additional expenditure, comprised of the combined operational and capital expenditure made by CSU campuses from outside a given region, in that region.

- Overall, CSU contributed 0.03% of GRP, 0.02% of household income and 0.02% of FTE employment in the Sydney Region in 2016 when flow-on effects are taken into account.
- The main industry sectors impacted by CSU in terms of FTE employment were Retail trade, Health care and social assistance, and Professional, scientific and technical services.

\$96.8^M
GRP

432 FTE
EMPLOYMENT

\$37.3^M
INCOME

	GRP \$m	Employment FTE	Income \$m
Initial	53.9	220	16.5
Flow on	42.9	212	20.8
Total	96.8	432	37.3

Note: Data presented may not add up due to rounding

Campus operations

\$35.6^M
GRP

68 FTE
EMPLOYMENT

\$6.3^M
INCOME

- Overall, the operations of Sydney Region campuses contributed 0.01% of GRP, 0.003% of household income and 0.003% of FTE employment in the Sydney Region when flow-on effects are taken into account.
- The main industry sectors impacted by the operations of Sydney Region campuses in terms of FTE employment were Education and training, Professional, scientific and technical services, and Retail trade.

Detailed impacts of the operations of Sydney campuses on the Sydney Region economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	29.9	36	3.3
Flow on	5.8	32	3.0
Total	35.6	68	6.3

Note: Data presented may not add up due to rounding

Student impacts

\$60.8^M
GRP

362 FTE
EMPLOYMENT

\$30.7^M
INCOME

Of the 3,005 students studying internally at Sydney campuses, 2,730 were classified as non-local to the Sydney Region.

- Overall, student impacts contributed 0.02% of GRP, 0.02% of household income and 0.02% of FTE employment in the Sydney Region when flow-on effects are taken into account.
- The main industry sectors impacted by student expenditure in terms of FTE employment were Retail trade, Health care and social assistance, and Professional, scientific and technical services

Detailed impacts of students on the Sydney Region economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	23.9	184	13.1
Flow on	36.9	179	17.6
Total	60.8	362	30.7

Note: Data presented may not add up due to rounding

Capital expenditure

\$0.4 ^M GRP	2 FTE EMPLOYMENT	\$0.2 ^M INCOME
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- Capital expenditure by Sydney Region campuses had minimal impacts on the Sydney Region economy.
- The main industry sectors impacted by capital expenditure in terms of FTE employment were Construction and Professional, scientific and technical services.

Detailed impacts of capital expenditure by Sydney Region campuses on the Sydney Region economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	0.1	1	0.0
Flow on	0.3	2	0.1
Total	0.4	2	0.2

Note: Data presented may not add up due to rounding

Additional expenditure

\$210.7 ^M GRP	1,229 FTE EMPLOYMENT	\$125.4 ^M INCOME
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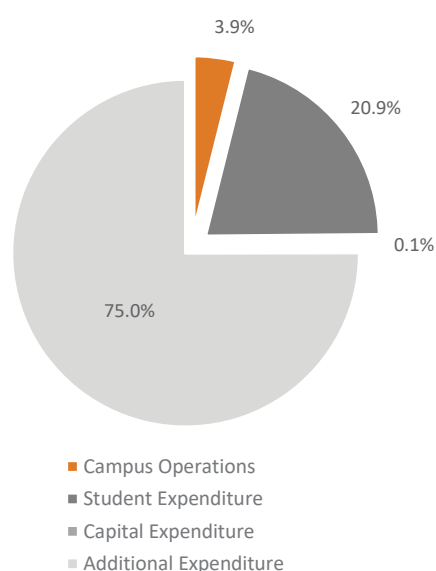
- Overall, the combined operational and capital expenditure of non-Sydney Region CSU campuses, made in the Sydney Region, contributed 0.1% of GRP, 0.1% of household income and 0.1% of FTE employment in the Sydney Region when flow-on effects are taken into account.
- The main industry sectors impacted by other campus operations in terms of FTE employment were Education and training, Professional, scientific and technical services, and Financial and insurance services.

Detailed impacts of additional expenditure on the Sydney Region economy are provided below.

	GRP \$m	Employment FTE	Income \$m
Initial	82.6	675	65.2
Flow on	128.0	624	60.3
Total	210.7	1,299	125.4

Note: Data presented may not add up due to rounding

SYDNEY REGION IN FOCUS



Employment impacts

- Additional (non-Sydney Region campus) expenditure, generated the largest contribution to FTE employment in the Sydney Region at 75.0% of the overall employment impacts.
- Student expenditure, the second largest contributor to FTE employment, made up 20.9% of the overall FTE impact.

Student impacts

- 4,812 students were enrolled at Sydney Region campuses in 2016, of which 1,807 students studied by distance.
- 3,005 students studied internally at Sydney Region campuses in 2016, of which 275 (9%) were local.
- The economic impact of expenditure by internal local students attending Sydney Region campuses (expenditure which has not been included in the above economic impacts) has been estimated at \$5.9M in GRP, \$3.0M in household income and 36 FTE jobs in the Sydney Region economy.



METHODOLOGY

Input-output analysis was used in this study to determine the economic impact of CSU. Input-output analysis provides a detailed picture of the structure of a regional economy at a point in time and can be used to estimate the contribution or impact of a particular sector of the economy or individual organisation including flow-on or multiplier effects.

Geographic scope

CSU's economic impact was assessed for each LGA in which the major campuses are located and for each of the three major regions: Central, Northern and Southern. Additionally, economic impacts were produced for the Australian Capital Territory (ACT) and the Sydney Region. The Sydney Region has been created from an aggregation of Sydney Statistical Areas at Level 4 (SA4) of the Australian Statistical Geography Standard. A total of 12 impacts were estimated incorporating both regional and metropolitan impacts.

Table 3. Campus Region Geography

CSU campus/activity	Geographical Region
Port Macquarie	Port Macquarie-Hastings LGA
Bathurst	Bathurst LGA
Dubbo	Dubbo Regional LGA
Orange	Orange LGA
Albury	Albury LGA
Goulburn	Goulburn Mulwaree LGA
Wagga Wagga	Wagga Wagga LGA
Australian Capital Territory	Australian Capital Territory
Sydney Region Aggregation of the following Statistical Area 4 (SA4) regions in the Sydney basin:	
<ul style="list-style-type: none"> Central Coast Sydney - Baulkham Hills and Hawkesbury Sydney - Blacktown Sydney - City and Inner South Sydney - Eastern Suburbs Sydney - Inner South West Sydney - Inner West 	<ul style="list-style-type: none"> Sydney - North Sydney and Hornsby Sydney - Northern Beaches Sydney - Outer South West Sydney - Outer West and Blue Mountains Sydney - Parramatta Sydney - Ryde Sydney - South West Sydney - Sutherland
	New South Wales

Central, Northern and Southern regions have been created from an aggregation of Statistical Area Levels 3 and 4 of the Australian Statistical Geography Standard.

Table 4. Broad Region Geography

Broad Region	Statistical Area Level	State within which the broader region is located
Central	Newcastle and Lake Macquarie SA4	New South Wales
	Hunter Valley excluding Newcastle SA4	
	New England and North West SA4	
	Far West and Orana SA4	
	Central West SA4	
Northern	Mid North Coast SA4	New South Wales
	Coffs Harbour – Grafton SA4	
	Richmond – Tweed SA4	
Southern	Illawarra SA4	New South Wales and Victoria
	Southern Highlands and Shoalhaven SA4	
	Capital Region SA4	
	Riverina SA4	
	Murray SA4	
	North West SA4	
	Bendigo SA4	
	Hume SA4	
	Shepparton SA4	
	Wellington SA3	
	Gippsland - East SA3	

Constructing the tables

The input-output tables for this project were derived from the Australian Bureau of Statistics (ABS) 2013-14 national input-output table updated to 2015-16 using the National Accounts and Labour Force Survey data for that year. The Australian table was then used to generate tables for New South Wales, Victoria and the ACT using the Generation of Regional Input-Output Tables (GRIT) technique. This incorporated data from:

- 2016 Census
- 2015-16 National State Accounts (ABS Cat No 5220.0)
- Australian Demographic Statistics (ABS Cat No 3101.0)
- Quarterly data on employment by industry sector (ABS cat. no. 6291.0.55.003).

The GRIT technique derives regional input-output tables from the national input-output table using location quotients and superior data at various stages in the construction of the tables. The GRIT procedure was developed by Associate Professor Guy West and Professor Rod Jensen of the University of Queensland and is the most widely used method of constructing regional input-output tables in Australia¹.

The impact of expenditure made in each broader region has been measured using a multi-region table constructed to reflect the campus regions and the balance of the broader region. This provides greater accuracy in the measurement

1 Miller, R. E., Blair, P. D. Input-Output Analysis: Foundations and Extensions. New York, Cambridge University Press, pp. 373-374

of the impacts incurred in this broader region.

Data collection and analysis

CSU's Operations

CSU provided WRI with detailed information about CSU's expenditure, location of expenditure, employment and revenues. Operational data was used to construct a new sector row and column in the input-output table representing the operations of the respective CSU campus. This was then subtracted from the Education sector to maintain the integrity of the table and remove double-counting. The economic impacts of CSU campus operations were then estimated using the industry significance method (as discussed below).

Income

Income data was provided by CSU. Income sourced from outside the LGA or broader region was used to determine the exports into the region.

Wages and salaries

CSU supplied information on the number of FTE employees and associated wages and salaries for the year 2016 for each of the campuses.

Remaining operational expenditure

CSU supplied information regarding operational expenditure during 2016 by accounting code and the location where the purchase was made for each campus. Local expenditure was defined as that made in the immediate local area, for example, only those purchases where the expenditure was made in Albury LGA were classified as local for the Albury LGA table, with the balance being treated as imports to the region.

Expenditure data provided by CSU was allocated to one of 19 industry sectors in the model using information from:

- CSU's accounting department or based on the accounting code description
- ABS Australian and New Zealand Standard Industrial Classification (ANZSIC 2006)
- The Australian National Accounts Input Output Product Details.

Capital Expenditure

CSU supplied information regarding capital expenditure during 2016 by accounting code and the location where the purchase was made for each campus. WRI has estimated the economic impacts of capital expenditure using the final demand impact method (as discussed below). In any given year, these results are influenced by the magnitude of capital expenditure.

Student Expenditure

The following process was followed in order to model student expenditure:

1. CSU provided data regarding home address on enrolment and mode of study (internal, distance and non-award) during the semester for all students attending each of the campuses for the 2016 calendar year.
2. Only internal students whose home address on enrolment was outside the study area were classified as "non-local" for the purpose of assessing the impact of their expenditure. The definition of "non-local" for a particular

LGA includes all internal students who had a home address outside of the LGA. Therefore, for each campus, the number of “non-local” students in the LGA would be greater than the number of “non-local” students in the broader region.

The inclusion of expenditure by “non-local” internal students only as a net increase, is based on the premise that, had CSU not existed, local students would still have remained in the local area and studied elsewhere or found employment. It is, however, possible that students who originated in the area surrounding a CSU campus, and who are currently studying at that campus, might have left the region to study in the absence of CSU. This would result in a loss of expenditure from the region. The conservative assessment of the total impact of CSU only includes expenditure by “non-local” students. However, an indication of the difference between total expenditure by “non-local” students and all students attending CSU campuses internally is provided in the relevant sections of this report.

3. Students whose home address was in an adjacent LGA were classified as non-local to the campus and therefore their expenditure modelled. However, due to their residential proximity to the campus, it was assumed that these students would have no expenditure on housing costs, household furnishings and services or domestic fuel and power within the study area. Furthermore, the expenditure of students from adjacent LGAs on food and beverage, transport and recreation was also reduced, when compared with those living in accommodation within the study area.
4. Information relating to student expenditure was derived from a number of sources including the 2015-16 ABS Household Expenditure Survey (ABS Cat No. 6530.0). That data provides average expenditure per household by various categories for New South Wales as a whole, average by quintile for New South Wales in aggregate and average for New South Wales – Capital City and New South Wales – Rest of State. The average weekly expenditure for New South Wales – Rest of State was adjusted to reflect the overall State distribution for the second gross household income quintile and subsequently adjusted to equate to average expenditure per person. With regard to the assessment for the Greater Sydney region, the assessment was based on a similar adjustment for New South Wales – Capital City. Similarly, for the Canberra impact, this was adjusted to reflect the published data for the Australian Capital Territory. The total annual expenditure calculated was checked for reasonableness against the Federal Government’s website for students intending to study in Australia for 2016-17.
5. It was assumed that those living in on-campus accommodation had no expenditure on household goods or utilities. In addition, accommodation rental payments by students living on-campus were excluded to avoid double-counting, as these payments are already included in CSU revenues. As a substantial proportion of the residential packages available at CSU include a catering component, the expenditure on food and beverage for those living on-campus was also reduced, when compared with those living in off-campus accommodation.
6. Only students who lived overseas on enrolment have been assumed to make a net increase to expenditure on health insurance, as it is compulsory for overseas students to take up health insurance coverage for the duration of their stay.
7. CSU also provided information relating to the number of students undertaking block mode enrolments at each campus along with the average duration of the study period. Only those students from outside the immediate local area were included when assessing student expenditure derived from block mode enrolments and expenditure by broad category was adjusted to reflect reduced average weekly spend in some categories.
8. WRI has estimated the economic impacts of student expenditure using the final demand impact method (as discussed below).

Expenditure associated with graduation ceremony visitation

CSU provided information regarding the number of students attending graduation ceremonies at each campus. It was assumed that the origin of guests attending graduation ceremonies was distributed in the same proportion as the home residence of students on enrolment and an average number of guests per individual of 3 was assumed.

Based on home LGA, an assessment was made regarding the likelihood of guests having an overnight stay or making a day trip. Those coming from an adjacent LGA were assumed to be making a daytrip. Those from further afield were assumed to be staying overnight (utilising an average of 1.5 nights per guest). Information relating to tourist expenditure (average domestic day and overnight tourist expenditure) in the respective LGA was derived from Destination NSW's LGA profiles as at September 2016.² This expenditure was allocated to expenditure categories based on Tourism Research Australia's regional profiles³. This was then used to estimate the likely additional expenditure in the relevant LGA or broader region generated by guests attending graduation ceremonies.

This expenditure is likely to be under-estimated as it does not include expenditure made by family attending orientation on commencement.

Economic Impact Analysis

Input-output analysis provides a detailed picture of the structure of a regional economy at a point in time. This is used to estimate the contribution or impact of a particular sector of the economy, or activity within the economy, including flow-on effects.

The economic impact of CSU has been reported as a sum of:

- Initial impacts: defined as the value of the immediate impact on the respective LGA or broader region as a result of CSU's operations, capital expenditure and non-local student expenditure; and
- Flow-on impacts: defined as the value of changes in the regional economy in the course of an additional round of spending after the initial impact occurred.

The impact of CSU was estimated in terms of:

- GRP – equal to gross output minus intermediate inputs. GRP, also known as 'Value added', is the difference between the costs of production (excluding the compensation of employees, gross operating surplus, taxes and imports) and the value of sales turnover. GRP sums the value added components of production through the supply chain, while initial expenditure includes multiple counting of expenditure through the supply chain. GRP is the most reliable measure of the actual value of production. It is the equivalent measure used in the National Accounts to calculate Gross Domestic Product.
- Income, measuring the benefit received by regional households from economic activity. It typically refers to compensation of employees but can also include income in return for productive activity such as the gross mixed income of unincorporated enterprises, gross operating surplus on dwellings owned by persons, and property income receivable and transfers receivable such as social assistance benefits and non-life insurance claims.
- Full-time equivalent employment, a measure of the workload of an employed person in a given location that makes workloads comparable across different types of employment (part-time and full time).

² Destination NSW, LGA Profile for Albury, Bathurst, Dubbo, Goulburn, Orange, Port Macquarie, Sydney and Wagga Wagga.

³ Tourism Research Australia, Regional Tourism Profiles 2016.

Industry Significance

Input-output tables are frequently used to provide estimates of the significance of a particular industry or organisation in terms of its contribution to the economy. This is done by examining the effects of the organisation shutting down and ceasing all economic activities. This method provides an estimate of the level of economic activity that can be attributed to that particular organisation, in this case CSU. The industry significance approach was used to model the operations of CSU.

When modelling the operations of CSU on the respective LGA or broader region the initial impact of FTE employment and associated wages and salaries were allocated to the region of employment. For example, the initial impact of employees at the Bathurst campus was allocated to Bathurst, irrespective of their residential address.

Final Demand Impacts

The final demand impact analysis calculates the impacts (measured by output, value added, household income and employment) across all sectors in response to changes in industry final demands.

The final demand approach was used to model capital expenditure, student expenditure and the expenditure by visitors attending graduation.

Reporting economic impacts

CSU's overall impact on the LGA or broader region incorporates the following the impacts:

- Local campus operations
- Non-local student expenditure and the estimated expenditure generated by family and friends from outside the local area attending graduation ceremonies
- Capital expenditure made by the local campus
- Additional economic impacts generated by the operations of other CSU campuses in the local region.

General assumptions and limitations

It should be noted that this assessment of the economic impact of CSU has been undertaken utilising conservative assumptions, including the following:

- No allowance has been made for additional economic impacts derived from visits to the region by family members, particularly those of overseas students. This would be expected to impact on the hospitality, transport and retail sectors in particular.
- No allowance has been made for expenditure by visiting academics which would also generate additional economic impacts.
- No allowance has been made for the present value of benefits derived from education provided to students by CSU. This includes the higher earnings of university graduates compared to non-graduates over their lifetimes and the economic benefits to society of having these graduates in the workforce.
- No allowance has been made for the present value of economic and other benefits from research and knowledge generation undertaken at CSU and from knowledge transfer through collaboration with industry and governments.
- No allowance has been made for the contribution of the CSU to the social and cultural base of the regional community.

WESTERN RESEARCH INSTITUTE

WRI is a regional development research organisation located in Bathurst, New South Wales. WRI holds a wealth of knowledge on employment, business development and investment issues affecting regional Australia. It has worked with Commonwealth, State and Local Governments and industry groups on numerous investment and development programs in regional areas. WRI has strong credentials in business and commercial market consulting and applied economic modelling including input-output analysis, shift-share, agribusiness and regional socio-economic surveys and analysis.

Ms Kathy Woolley - Chief Executive Officer

BCom (Econ with merit - OWO), GAICD, AGSM, CertIV

Training and Assessment.

Kathy joined the WRI team in February 2018 having previously worked on a variety of boards and in a number of senior management roles across sectors including media, health, education, regional development, government, event management, research and sales. For a number of years Kathy also ran a consultancy specialising in services for not for profit entities, focusing on best practice techniques in management and governance. With formal qualifications in change management, company directorship, economics and training, and well-developed skills in human resources, information technology, finance and economic development, Kathy offers a unique skill set to assist with most business needs.

This is the second time Kathy has worked for WRI, previously fulfilling the role of Business Development Manager. A position as a research officer for a similar organisation in the Illawarra rounds off the experience in economic modelling and research.

Mr Alistair MacLennan – Senior Research Consultant

BA Political Economy, First Class Honours (UNE)

Having served in a variety of parliamentary, public service and private sector roles, Alistair brings a wealth of research experience to WRI. Alistair has well developed skills in data analysis, economics and business, and has a wide understanding of government. In addition, Alistair also has experience in policy development in the energy sector, where he engaged with industry, government agencies and NGOs to inform policy. Alistair's experience in engaging with clients, stakeholders and the public assists WRI to fully understand its client's needs and provide tailored research. Alistair is currently furthering his skills, studying accountancy with CPA Australia.

Mr Chris Mullen - Research Officer

BEcon UNE


Chris is an Economics graduate from the University of New England, currently undertaking a Master of Economics course. Chris has a great interest and passion for macro and microeconomics, policy analysis, and development economics. Throughout his degree, Chris has gained skills in benefit-cost analysis, business statistics, and economic modelling. Having grown up on a property on the mid-north coast, Chris has a strong understanding of life in regional Australia and the issues rural communities face.

Ms Dale Curran – Executive Officer


BA ANU

Dale is responsible for all administrative processes at WRI including executive support, finance, management of the board of Directors and maintenance of policies. She has worked in a variety of roles at WRI, including Fieldwork Supervisor and Research Assistant, and has worked on several community and business surveys. In addition to her administrative role, Dale has oversight of marketing, PR and communications activities, and brings a high level of skill to the design of WRI's reports.

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