



# **Economic Impact Assessment**

**Planning Proposal  
24 Hunter Street  
Horseshoe Bend  
Maitland NSW**

**Catholic Diocese of Maitland - Newcastle**

**December 2022**

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**12 December 2022**



## Abbreviations

ABS	Australian Bureau of Statistics
ANZSCO	Australian and New Zealand Standard Classification of Occupations
ASC	All Saints College
CBD	Central Business District
CDMN	Catholic Diocese of Maitland-Newcastle
DPE	Department of Planning and Environment (NSW)
EIA	Economic Impact Assessment
ELC	Early Learning Centre
FTE	Full Time Equivalent
GVA	Gross Value Added
I/O	Input/Output
LGA	Local Government Area
MCC	Maitland City Council
MPC	Multipurpose Centre
PC	Productivity Commission
SIA	Social Impact Assessment



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## 1 Purpose of report

This report presents an Economic Impact Assessment (EIA) prepared on behalf of the Catholic Diocese of Maitland-Newcastle (CDMN). The EIA has been prepared to support a planning proposal in respect of land owned by CDMN at 24 Hunter Street, Horseshoe Bend, Maitland (Lot 1 DP 1261532), within the Maitland City Council (MCC) Local Government Area (LGA).

The object of the planning proposal is to amend the existing *RE2 Private Recreation* to permit *Additional Permitted Uses* consistent with all uses permitted under the *B4 Mixed Use* Zone, with the express exception of residential accommodation. The planning proposal would bring the site within the ambit of the NSW Department of Planning and Environment (DPE) *Local Planning Directions Focus Area 7.1 'Business and Industrial Zones'*. The objectives of the direction are:

- a) Encourage employment growth in suitable locations,
- b) Protect employment land in business and industrial zones, and
- c) Support the viability of identified centres.

The specific objective of the planning proposal is to facilitate the continued use of the site in association with the adjacent All Saints College St Peter's Campus immediately west of the site on Hunter Street, and the Regional Sportsground to the east. Other community uses will also be supported. The rezoning enables additional facilities to be provided for use of the school and the public, providing additional community benefit. This includes future uses including a multipurpose centre (MPC) for use in conjunction with school activities and for other uses, including private hire by members of the public or groups, and uses adjunct to other events taking place in the immediate area, such as at the regional sportsground. The proposed additional land use permissions are consistent with the general B4 Mixed zoned land to the south of the site. The EIA examines the potential economic effects, in the context of these considerations.

Based on this summary objective it is submitted that the proposal is consistent with each element of direction 7.1, on the bases identified in Table 1. It is submitted that concordance with these objectives supports a conclusion that the planning proposal also complies with the requirements in Direction 7.1 (1).



**Table 1: Planning proposal concordance with Local Planning Direction (7.1)**

Direction 7.1 objective	Comments on concordance
(a) Encourage employment growth in suitable locations.	On the basis that the proposed primary use of the site is related to the adjacent school, and the early learning centre is already established onsite, it is submitted that the site is a suitable location. To the extent that the site will support additional educational activity, there may be some notionally additional employment derived from the proposed uses.
(b) Protect employment land in business and industrial zones.	The planning proposal does not directly address this point, as the site is currently not appropriately zoned to be classified as a business or industrial zone. However, the planning proposal would ensure use of the site consistent with the current, predominant educational uses in the area.
(c) Support the viability of identified centres.	Maitland is identified as a strategic centre in the <i>Hunter Regional Plan 2036</i> <sup>1</sup> . The proposed development under the planning proposal represents use that would integrate with and augment existing uses in central Maitland, and will provide a facility that will support the functioning of the CBD and surrounding communities.

### 1.1 Relationship to Social Impact Assessment (SIA)

This firm has also prepared an SIA for this Planning Proposal. The SIA and the EIA should be viewed as related documents, which in combination present evidence on the potential for socioeconomic impacts to eventuate from the planning proposal. As is identified throughout both reports, the propensity for effects is more likely to relate to subsequent development, supported by the proposed amendment to the current zoning.

<sup>1</sup> DPE 2016.

## 2 Site description

As is identified in Section 1, the site is Lot 1 DP 1261532, known as 24 Hunter Street, Horseshoe Bend (Maitland). The current RE2 site is shaded green in Figure 1. The existing site has a total area of 1.154 hectares (Ha).

Nominally, the zoning will remain RE2, with the additional uses augmenting the current permitted uses on the site.

**Figure 1**



### 3 Economic impact assessments

#### 3.1 Maitland LGA Economic Profile data

To provide context for the scale of economic effects likely to result from the project, Table 2 identifies high level economic measures for the Maitland LGA. The data are drawn from MCC's economic profile (REMPLAN 2022) and report 2021 assessments.

**Table 2: MCC LGA economic indicators**

Indicator	Value
Gross Regional Product (GRP)	\$10.86 billion
Employment ( # of jobs)	28,318

In a regional economy of this scale, any single business activity supported on the relevant land is likely to be comparatively very modest, and of itself, not of material scale. However, from the perspective of creating or supporting additional employment and economic activity for the relevant business, the effects are likely to be material for parties who directly benefit from this activity.

#### 3.2 Current use of site – St Nicholas' Early Learning Centre

The early learning centre (ELC) currently operated on the site provides child care services, and a training facility for prospective child care workers. These activities will continue on the site, should the rezoning be approved. The economic effects of direct employment for the two elements, and an assessment of the indirect economic benefit associated with child care services are addressed separately in the following sections.

##### 3.2.1 Direct employment – ELC

The centre employs 18 staff. For the purposes of analysis, the workforce is assumed to generally comprise 2 managers, and 16 child carers. Average pre-tax earnings for these two employment classes were obtained from the National Skills Commission *Labour Market Insights* website. The application of these to the centre's workforce is presented in Table 3. The estimates may differ from actual employee benefit accruing to ELC staff, however these are not disclosed on the basis of confidentiality.

**Table 3: ELC employee benefit estimates**

Position	Positions	Weekly	Annualised <sup>2</sup>	Annual total
ANZSCO <sup>3</sup> 1341 Child Care Centre Manager	2	\$1,494	\$78,000	\$156,000
ANZSCO 4211 Child Carer	16	\$1,059	\$55,000	\$880,000
<b>Total workforce</b>	<b>18</b>	<b>-</b>	<b>-</b>	<b>\$1,192,000</b>

<sup>2</sup> 52 weeks. Rounded to nearest \$1,000.

<sup>3</sup> Australian and New Zealand Standard Classification of Occupations



The method for converting these gross earnings to a disposable income estimate is presented in Annexure 1. As is set out in the annexure, total annual disposable income for the workforce is **\$550,000**. This disposable income is expended in the local and regional economies, which supports further business activity and employment each year.

### 3.2.2 Other economic activity

The ELC will also generate additional economic activity. This includes, for example the purchase of goods and services required to operate and maintain the centre. Some goods and services may be required on a regular basis, such as the services of a commercial cleaner, or grounds maintenance contractor. Indicative incomes for these service roles are presented in Table 4. The assessments are indicative only, as there is a presumed, reasonably high, probability that work at the site would form only part of the contractor/workers' employment, and would thus only account for the relevant proportion of the workers' incomes.

**Table 4: Service provider incomes**

Service provider position	Weekly	Annualised <sup>4</sup>
ANZSCO 8112 Commercial Cleaner	\$1,013	\$53,000
ANZSCO 8414 Garden Labourer	\$1,130	\$59,000

### 3.2.3 Economic effects on client households

The centre provides services to up to 70 children. For the purposes of these analyses, occupancy is assumed at 100%<sup>5</sup>. Data on the number of families having children enrolled at the centre was not available at the time of preparing this assessment. However, 2021 Census data for the LGA reported that the average number of children per family *for families with children* was **1.9 children**.

Clearly, there is significant propensity for variance in the ages and stages of schooling at which the children within these families may be at any time. Consequently, assuming that the number of families with children enrolled in the ELC ranged between 70 families (1 child per family) and 37<sup>6</sup> families (1.9 children per family as per Census data), the mean number of families is 54 families, which is adopted for this analysis. Table 5 provides an assessment of incomes for these families, based on 2021 Census *median weekly family income* data.

<sup>4</sup> 52 weeks. Rounded to nearest \$1,000.

<sup>5</sup> At the time of preparation of this report the Australian Government Department of Education and Training 'Child Care Finder' website, reported no vacancies for St Nicholas OOSH.  
< <https://www.childcarefinder.gov.au/> >

<sup>6</sup> Rounded



**Table 5: Estimate of family incomes**

Families (count)	Median weekly income	Annualised <sup>7</sup>	Annual total
54	\$2,088	\$109,000	\$5,886,000

Applying the proportion of weekly income that is disposable income (46.1%, as explained in Annexure 1), these families might be expected to collectively spend up to **\$2.7 million** in the local and/or regional economies each year.

Importantly, this estimate should be considered as the upper bound for these potential effects. The circumstances for individual households may vary significantly in relation to balancing work and parenting duties. For example, child care services may permit one partner to resume work at less than full time equivalent (FTE) hours. This may be reasonably prevalent, as some proportion of employment is generally likely to be part time (< 1 FTE).

The actual effect cannot be accurately determined. However, indicatively, the ability of these households to access child care to support their employment is an important element in ensuring that their households are financially better positioned, which may also result in other favourable outcomes, such as personal and family wellbeing. Additionally, the derived employment and other economic benefits that result from their household spending supported by employment continues to accrue to the local/regional economy.

### 3.3 Future uses under zoning amendment – Additional Permitted Uses

As stated in the introductory material, the aim of the planning proposal is to allow ‘additional permitted uses’ on the site under the current RE2 zoning, consistent with uses permitted within a *B4 Mixed Use* zone, with the express exclusion of the residential accommodation provided for under B4. Specific to the site, the relevant uses have been advised as; *‘Centre-based childcare facilities; Commercial premises (business, office, and retail); Community facilities; Educational establishments; Entertainment facilities; Function centres; Hotel or motel accommodation; Information and education facilities; Medical centres; Recreation facilities (indoor); Registered clubs’*.

The proposed MPC would accommodate a number of these uses. Primary use would be in relation to ASC, but several other uses outside of school hours are possible. These include indoor recreation/sport activities (such as dance, martial arts and yoga classes), cultural activities (such as art classes), private functions (such as wedding receptions and other functions) and uses adjunct to nearby sporting infrastructure (such as post-match/tournament presentations, café facilities).

<sup>7</sup> 52 weeks. Rounded to nearest \$1,000.



### 3.4 Construction and operation of Multipurpose Centre

As is indicated by this planning proposal, the future development of the MPC on the site is at a relatively early stage, in terms of investment in the final scale and design of the centre. However, indicatively, the proponent estimates that the cost of developing the centre would be in the order of \$12 million.

#### 3.4.1 Economic benefit of construction of the MPC

##### 3.4.1.1 *Description and application of input-output multipliers*

The estimated \$12 million in construction expenditure for the MPC will produce a range of positive direct and indirect economic effects. The nominal direct, supply chain and consumption effects are assessed using multipliers developed by the ABS (2001)<sup>8</sup>. Multipliers are applied to each \$1 million of expenditure, the output, gross value added (GVA) and employment will increase in line with the magnitude of the multiplier. It is noted that ABS advises that there are limitations to multiplier based analysis, which overall may result in overestimate of effects. Part of this impact relates to the propensity for double counting in the structure of the modelling that produces multipliers. To control for this effect, ABS identifies the GVA multiplier as less susceptible to this limitation (Cultural Ministers Council, 2001). However, the estimates presented in the following analyses should be interpreted as indicative of the scale of effects only.

##### 3.4.1.2 *Multipliers used*

ABS (2001) reported multipliers for 'other construction' (i.e. non-residential), based on 1996/1997 input-output (I/O) tables from the National Accounts as:

Output:	2.92
Gross Value Added (GVA):	1.47
Employment:	24

Multipliers generated by Aigis Group (2016) using the ABS methodology and based on 2012/2013 IO tables were:

Output:	3.26
GVA:	1.33
Employment:	16.7

The multipliers remain generally stable over time, which is indicative of the relatively stable structure of construction and other industry supply chains (i.e. many similar inputs are required for many projects over time). As noted above, application of the multipliers is based on the effects of each \$1 million of output (i.e. additional activity), such as in relation to a specific project. Estimates based on these multipliers for the proposed MPC are

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<sup>8</sup> Cultural Ministers Council: Multipliers for Culture-Related Industries. National Centre for Culture and Recreation Statistics, Australian Bureau of Statistics. November 2001  
<[http://www.archive.dcita.gov.au/2007/12/cultural\\_ministers\\_council/media\\_releases/multipliers\\_for\\_culture\\_related\\_industries\\_2001#Output,20added20employment%20multipliers](http://www.archive.dcita.gov.au/2007/12/cultural_ministers_council/media_releases/multipliers_for_culture_related_industries_2001#Output,20added20employment%20multipliers)>

presented in Table 6. Given the assumed propensity for such analysis to result in overestimation, the lower of the two sets of multipliers is adopted for each measure, where applicable. However, consistent with the advice of ABS in respect of the theoretical limitations of such assessments, the proposed development will result in positive economic effects over the short period in which construction work occurs.

**Table 6: Indicative economic effects of proposed MPC construction**

	<b>MPC (value ≈ \$12 million)</b>
Output (\$ million)	35.0
Gross value added (\$ million)	16.0
Employment (FTE)	200

In the context of the Maitland LGA economy, the effect is modest, and brief in duration. That notwithstanding, the economic impacts of this activity will be positive.

#### 3.4.2 MPC Operation stage effects

The primary use of the MPC would involve various uses as stated in Section 3.3. Some proportion of these uses would support employment (such as in relation to school activities), and create additional employment (such as in relation to staffing at functions held at the MPC). These effects would be fractional, from the perspective of an attempt to quantify them in terms of FTE positions, for example. This is compounded by the possibility that the intensity of use may vary widely in terms of the main school-related uses.

##### 3.4.2.1 Quantitative analysis

###### 3.4.2.1.1 Employment – regular maintenance and upkeep

Section 3.2.2 and Table 4 provided indicative economic valuations for regular services for the existing ELC (i.e., cleaning and maintenance). Similar services would also be required for the MPC. The scale of these services may be greater, as initial planning material indicates a substantially larger building than the ELC. However, the assessment is not repeated in this section, as these activities, particularly maintenance services, may vary in frequency.

###### 3.4.2.1.2 Employment generating uses of the MPC

As is the case with the subsequent qualitative discussion of activity, it is not feasible to directly produce a fully justified assessment of other activities. However, as is indicated by the proponent, a range of these activities would be income and employment generating. In order to provide an indicative quantification, a scenario approach is presented below.

The key assumption on which the scenario is predicated is CDMN generating income of the \$500,000 from functions hosted at the MPC, over an undefined period. The resulting analyses are based on application of multipliers, as explained and applied in Section 3.4.1.2. ,



with the lower values applied for conservatism. The ABS multipliers used are for ‘accommodation, café and restaurants’<sup>9</sup>.

ABS (2001) multipliers are:

Output:	3.0
Gross Value Added (GVA):	1.46
Employment:	25

Multipliers generated by Aigis Group (2016) using the ABS methodology and based on 2012/2013 IO tables are:

Output:	2.93
GVA:	1.46
Employment:	14.3

**Table 7: Indicative economic effects of proposed MPC function use**

	Functions (value \$500,000)
Output (\$)	1,465,000
Gross value added (\$)	730,000
Employment (FTE)	≈ 7

With respect to employment, it is emphasised that the estimated positions are full time equivalent (FTE). The hospitality industry characteristically has relatively high proportions of casual and part time employees, so the actual number of workers benefitting from employment at the MPC may be larger.

Management of the centre would be carried out within existing administrative functions within CDMN and ASC. As a result no additional management positions would be created.

### 3.4.2.2 Qualitative analysis

#### 3.4.2.2.1 Additional use of the site by ASC

The primary uses of the site will be education activities forming part of the adjacent school’s operations. It is not possible to distinguish what proportion of future activity would otherwise have been carried out on other parts of the school site/s, or what activities will be additional to current levels. Notionally, enrolments will increase over time, generally in response to population growth, which is detailed in the accompanying SIA. In this sense, some proportion of future activity may be additional, and may support the employment of additional teaching and/or ancillary staff, for example. Clearly, it is not possible to reliably quantify any such additional employment and related effects.

<sup>9</sup> Under ANZSCO classification 431 ‘Hospitality Workers’, the following occupations are included: Bar Attendants & Baristas, Café Workers, Hotel Service Managers, Waiters and Other Hospitality Workers. It is submitted that the ABS industry description concurs with this ANSCO classification

#### 3.4.2.2.2 Volunteering activity

Given the nature of the proposed MPC, there is a high likelihood that activities on the site may frequently involve the participation of volunteers. Due to the potential broad variety of activities that the MPC may host, it is not practical to place a reliable, quantified value on the services volunteers may provide. However, as an indication, the Productivity Commission (PC) in its research report *Contribution of the Not-for-Profit Sector* (2010)<sup>10</sup>, concluded that in the NFP sector (2006/7), ‘4.6 million volunteers work with NFPs with a wage equivalent value of \$15 billion’. This approximates the contribution of each volunteer at \$3,260 for the year, at 2006/07 dollar values.

### 3.5 Summary of quantified economic benefit

Table 8 presents a summary of the effects estimated in the preceding quantitative analyses. This includes existing activity that will be retained under the proposed rezoning (ELC) and additional activity, such as dwelling construction.

<b>Table 8: Summary of quantified economic benefit</b>	
<i>Retained/continuing activity - ELC</i>	
Employee incomes	\$1,192,000 (\$550,000 disposable) p.a.
Other goods and services providers	Indicative estimate only – part time engagement
Benefit to households of child care (supporting employment)	Up to \$2.7 million p.a.
<i>Additional activity</i>	
Construction of MPC	\$12 million
GVA (derived activity)	\$16 million
Employment during construction (direct + indirect)	200 FTE

### 3.6 Qualitative discussion of other direct impacts

Surpluses from commercial elements of operations facilitated by the proposed additional permitted land uses will be returned to CDMN. These surpluses will then be deployed in continuous improvement of the education services offered at ASC and other campuses operated by CDMN, including all campuses in the Maitland LGA. Dependent on the scale of surpluses over time, some element of these may also be committed to the provision of the various social and community services provided by CDMN agencies across the diocese. As is implied by this qualitative assessment, the scale of future surpluses cannot be quantitatively determined with any accuracy at this stage.

<sup>10</sup> < <https://www.pc.gov.au/inquiries/completed/not-for-profit/report> >

## 4 Qualitative assessment of other economic impacts

### 4.1 Potential effects on other uses in the surrounding B4 zone

#### 4.1.1 Relative scale of additional uses land under the planning proposal

As discussed in Section 2, the site is approximately 1.154ha in area, and the planning proposal seeks approval for certain additional uses permitted in B4 zoned land. The estimated area of existing B4 zoned land comprising the city centre to the south of the site, is advised as having been estimated at approximately 80Ha to 85Ha. The indicative proportions of the site (in the context of the proposed additional uses), to the existing area, are shown in Table 9.

**Table 9: Proportional increase in B4 zoned land – Maitland city centre area**

Additional B4 land area	additional @80Ha	additional @ 85Ha
1.154 Ha	1.44%	1.36%

An indicative assessment of the intensity of use of the CBD B4 land is presented in Table 9. The assessment draws on employment density published by DPE in its *Employment Lands Development Program* 2015 Report. The report specifically relates to employment lands in metropolitan Sydney and the Central Coast. The report estimated average job density at 50 jobs per developed hectare, for Sydney. For the Central Coast the figure was a comparable 48 jobs per developed hectare. However, separating the Central Coast into the (then) two LGAs of Wyong and Gosford, density for Wyong was 29 jobs per hectare, and Gosford 66 jobs per hectare. It is submitted that development in the Maitland CBD area is relatively similar to Gosford. Key assumptions for Table 10 are:

- To allow for existing open space and facilities with less concentrated employment, such as the adjacent school the lowest estimate of 48 jobs/ha is assumed.
- The (conservative) estimate of 80ha of B4 land in the Maitland CBD is assumed.
- The combined ASC campuses of St Peter's and St Mary's occupy 6.48ha within the CBD area. This is rounded to 6.5ha, and subtracted from the total B4 land. As a consequence, other B4 CBD land is assumed as 73.5ha
- The median employee income for Maitland LGA (ABS 2022), of \$55,241<sup>11</sup>.

As a result, the nearby B4 lands may support up to 3,528 jobs, noting that these jobs are not designated as FTE.

**Table 10: Job density – Maitland B4 zone**

Estimated CBD jobs	Average employee income	Total CBD employee incomes
3,528	\$55,241	\$194.9 million

It is emphasised that the CBD area may support *up to* the assessed number of jobs. At present, it is noted that there are a number of commercial properties in the near vicinity of

<sup>11</sup> ABS Data by Region 2022. Estimate is for 2019 (most recently published). Gross pre-tax income

the site that are unoccupied. This may also be the case for properties in other parts of the larger CBD. This would clearly reduce the actual number of employees, and the quantum of incomes assessed.

#### 4.1.2 Potential for effects of development consequent to planning proposal

The additional area will not create a material increase in B4 or similarly zoned land, of itself. The scale of potential uses on the additional land is also unlikely to materially impact on the current or other future uses that the existing, nearby B4 zoned land supports. Corresponding with this assessment, it is noted that the method used in Table 10 is not applied to the land subject of the planning proposal. The principal use of that land, and many of the prospective additional uses, are unlikely to support the intensity of employment of commercial premises in the CBD B4 zone.

As was stated in Section 3.2.4, uses of the proposed B4 permissions on the subject site may create some increase in competition. Uses, such as a café as identified in Section 3.3, may create additional competition. However, this is an extremely contestable market, with comparatively low barriers to entry. As such, the level of competition may vary from time to time, and consequently, this use would also be unlikely to materially affect existing businesses. Other potential uses, such as for functions, are similarly contestable, and would therefore be likely to create relatively limited negative economic impacts on third parties.

## 5 Conclusion

The proposed inclusion of additional permitted uses for the site under its existing RE2 zoning will under the planning proposal would:

- Support continuity of existing child care services that support local families and indirect economic activity.
- Permit development of the proposed MPC. Primary use will be related to the adjacent school. However, CDMN intends broader use of the MPC. These uses may also create additional employment and economic activity.
- Given the small proportional increase in B4-equivalent zoned land, and the scale of the activities it will accommodate, this action is unlikely to materially affect the operation of other businesses in the existing, nearby B4 zoned areas.

Considering these outcomes, on balance, it is submitted that the economic effects of the planning proposal would be positive overall.



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## Annexure 1: Method for local expenditure adjustment

In order to determine a net contribution to the local/regional economy, the method set out below is used. This involves the application of broad household expenditure data to the assumed *average* workforce income of \$66,000 (gross) per year.

ABS data for gross and disposable income (2015/2016, released 2017) are presented in Figure A1. Recalculating the annualised figure to a weekly nominal gross income, this is approximately \$1,270 per week<sup>12</sup>. This equates to the fourth quintile, for which 46.1%. Applying this disposable income proportion to the annualised total employee earnings (\$1,192,000), returns total annual disposable income of \$549,512. This is reported as \$550,000 in this report.

**Figure A1**

Mean income per week NSW	2015/16	Disposable	Gross	%
Lowest quintile	\$	397	454	87.4
Second quintile	\$	641	986	65.0
Third quintile	\$	878	1,690	52.0
Fourth quintile	\$	1,231	2,668	46.1
Highest quintile	\$	2,206	5,713	38.6
<b>All persons</b>	\$	<b>1,070</b>	<b>2,306</b>	<b>46.4</b>
Adjusted lowest income quintile(c)	\$	429	503	85.3

<sup>12</sup> \$66,000/52 weeks ≈ \$1,269 per week.