

July 2022

Report to University of Notre Dame

Economic and Social Contribution of the University of Notre Dame to the City of Fremantle



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Suggested citation for this report

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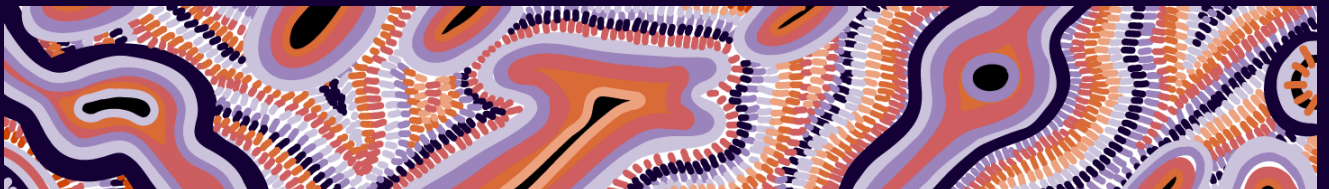
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ACIL Allen acknowledges Aboriginal and Torres Strait Islander peoples as the Traditional Custodians of the land and its waters. We pay our respects to Elders, past and present, and to the youth, for the future. We extend this to all Aboriginal and Torres Strait Islander peoples reading this report.



Goomup, by Jarni McGuire

Contents

Executive Summary	ii
1 About this Report	2
1.1 Report context	2
1.2 Project methodology	3
1.3 Report structure	3
1.4 Glossary of Terms and Abbreviations	4
2 University Overview and Outlook	5
2.1 Overview of the University of Notre Dame	5
2.2 Performance	10
2.3 Importance of higher education sector in Western Australia	13
3 Economic Profile of the City of Fremantle	15
3.1 Summary profile	15
3.2 Economy	16
3.3 Labour market	19
3.4 Population	21
4 Economic Contribution of the University of Notre Dame	24
4.1 Methodology	24
4.2 Financial profile	25
4.3 Economic contribution results	28
5 Social Contribution of The University of Notre Dame	33
5.1 Frame of reference	33
5.2 Methodology and approach	33
5.3 Social contribution findings	34
5.4 Social and cultural contributions	36
5.5 Local business and economic contributions	39
5.6 Health and wellbeing contributions	44
5.7 Skills and capacity contributions	45
Appendices	48
A Input Output Modelling	A-1
A.1 Results of Input Output Modelling	A-1



Executive Summary

Report Context

The University of Notre Dame is a national Catholic University, with a city-based campus located in the historic City of Fremantle, as well as in the North-West town of Broome and the Sydney CBD. The University was established by an Act of the Parliament of Western Australia on 21 December 1989, with its first 50 postgraduate students enrolled in February 1992. Since then, the University has grown significantly, with some 12,000 students enrolled across a wide range of undergraduate and postgraduate programs, primarily at its Fremantle campus.

The establishment and growth of the University of Notre Dame's Fremantle campus has been a major coup for the City of Fremantle through its role supporting the gentrification of the West End, and boosting demand for products and services from local businesses from the influx of students and staff in the area.

The University of Notre Dame's Fremantle campus is situated across a number of converted heritage buildings dating back to the late 1800s, as well as new purpose-built facilities. Properties purchased by the University of Notre Dame include old hotels, warehouses and parking lots, many of which were derelict and in disrepair. Since its establishment in the City of Fremantle, property purchases have steadily increased to accommodate a growing student population and the expansion into new academic disciplines.

While there is acknowledgement The University of Notre Dame is making a positive contribution to the West End and the City of Fremantle more broadly, to date this has never been quantified. To better understand the contribution the University of Notre Dame makes to the City of Fremantle and Western Australia, ACIL Allen was engaged to undertake an economic and social contribution study.

While the higher education sector plays a critical role in the economy, analysis of this important role has generally focussed on how universities educate the future workforce and undertake important research. However, universities can also play an important economic development role to the extent that they are large employers in a city or a region. This is particularly so in relation to the University of Notre Dame as a large organisation with a large property footprint in the City of Fremantle. It is in relation to the localised economic and social impacts of the University of Notre Dame that this study is focussed.

In order to estimate the economic and social contribution of the University of Notre Dame to the City of Fremantle, ACIL Allen undertook two primary modelling tasks: economic contribution modelling to estimate the direct and indirect impact of the University on the City of Fremantle's economy; and social contribution modelling to quantify the broader social impacts of the University that cannot be quantified through an economic modelling framework.

The University of Notre Dame recently released its 2022-26 Strategic Plan, which is focussed on building on the University's history and distinctiveness, enhancing its positive impact on the community and securing future financial and research viability. Importantly, core elements of the vision for The University of Notre Dame presented in the Strategic Plan have alignment to the ten-year vision for Fremantle outlined in the City of Fremantle's current Strategic Community Plan.

In undertaking this study, the University will have a credible evidence base to communicate its role in the economic and social development of the City of Fremantle, and contribute to shaping future policy and planning decisions, in collaboration with the WA Government, City of Fremantle and local community groups.

Economic Contribution of the University of Notre Dame

Fremantle is a vital articulation point between the global economy and Western Australia. While the operations and ancillary businesses in the maritime industry associated with Fremantle Port remain the central element of the local economy, in recent years the economy has diversified towards more services orientated industries, with the University of Notre Dame one of the key pillars behind the growth, development and diversification of Fremantle.

To independently assess the economic contribution of the University of Notre Dame to the Fremantle economy, ACIL Allen used its in-house Input Output (IO) modelling framework, which can produce results for the City of Fremantle and the WA economy more broadly for the 2020 calendar year (CY20).

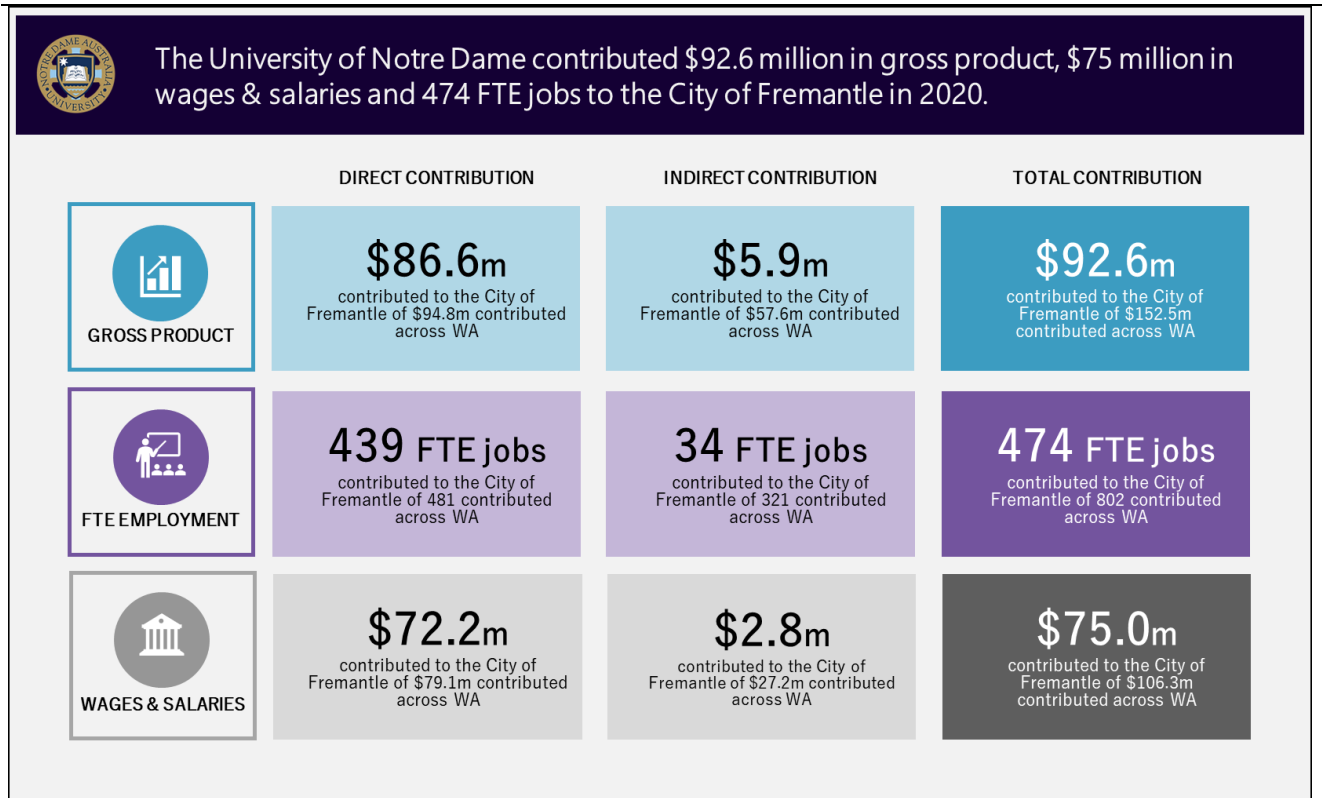
An economic contribution study takes the financial and employment data of the University to determine the overall size and scope or "footprint" on the economy. The economic contribution is calculated on the basis of the University's direct activities (such as surpluses generated and wages paid to staff) and indirect activities (such as flow on impacts from payments made to suppliers and goods and services purchased by employees) to determine the full extent of the flow-on economic contribution.

The results are presented in terms of the University's contribution to gross product, FTE employment and wages and salaries earned. The results are also reported according to the direct contribution – resulting from the University's direct activities – and indirect contribution – resulting from the activities of those providing goods and services purchased by the university and its staff. The results are also presented at both the City of Fremantle level and across the entirety of Western Australia.

Overall, the results of ACIL Allen's economic contribution modelling shows **the University of Notre Dame provides a significant contribution to the City of Fremantle's economy, through the economic output that it generates, the jobs that it creates and supports, and the wages and salaries that are earned.** A summary of these results is presented in **Figure ES 1** below.

Importantly, the results show that while the **direct impact of the University of Notre Dame are concentrated locally within the City of Fremantle's economy, the indirect contribution is felt across the State.** The results are discussed further below.

Figure ES 1 Economic Contribution of the University of Notre Dame – Summary Results



Source: ACIL Allen

Gross product



In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to Gross Product of \$152.5 million in Western Australia, of which \$92.6 million (61%) was generated within the City of Fremantle.**

In terms of the direct Gross Product contribution, which combines the value of salaries and wages and surpluses generated on production, ACIL Allen estimates that \$86.6 million was generated within the City of Fremantle in 2020. Highlighting the importance of the University to the City, **ACIL Allen estimates that the University of Notre Dame accounted for 36% of the total economic value from the Education and Training Sector in the City of Fremantle in 2020.**

In terms of the indirect Gross Product contribution, which combines the value of production related to good and service purchased by the University and its staff, ACIL Allen estimates that a further \$5.9 million was generated within the City of Fremantle, which equates to 10% of the \$57.6 million indirect Gross Product contribution in Western Australia.

Based on the economic contribution modelling, **ACIL Allen estimates that \$12,150 was generated in total gross output within the City of Fremantle for each student enrolled at the Fremantle campus in 2020.**

Employment



In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to employment of 802 FTE in Western Australia, of which 474 FTE jobs (59%) were generated within the City of Fremantle.**

In terms of the direct employment contribution, which is a measure of those directly employed by the University, ACIL Allen estimated that 439 FTE were directly employed within the City of Fremantle, which equates to 91% of the direct employment contribution in Western Australia.

In terms of the indirect employment contribution, which combines the jobs generated from the production of goods and service purchased by the University and its staff, 34 FTE jobs were generated within the City of Fremantle, which equates to 11% of the 321 indirect FTE jobs contributed across Western Australia.

ACIL Allen estimates that **1 FTE job was generated in the City of Fremantle for every 16 students enrolled at the Fremantle campus.**

Wages and Salaries



In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to wages and salaries of \$106.3 million in Western Australia, of which \$75.0 million (70%) was generated within the City of Fremantle.**

In terms of the direct wages and salaries contribution, which is a measure of the wages and salaries paid to those employed by the University, **\$72.2 million was generated within the City of Fremantle, which equates to 91% of the \$79.1 million direct wage and salary contribution in Western Australia.**

In terms of the indirect wages and salaries contribution, which combines the incomes generated from the production of goods and service purchased by the University and its staff, \$2.8 million was generated within the City of Fremantle, which equates to 10% of the \$27.2 million indirect wage and salary contribution across Western Australia.

ACIL Allen estimates that for **every student enrolled at the Fremantle campus, \$9,848 in direct and indirect wages and salaries was earned within the City of Fremantle.**

Overall Results

Figure ES 2 presents the direct and indirect economic contribution of the University of Notre Dame in 2020, in terms Gross Product, Employment and Wages and Salaries terms.

Figure ES 2 Economic Contribution Summary: Gross Product (\$m), Employment (FTE) and Wages and Salaries (\$m)



Source: ACIL Allen

Social Contribution of The University of Notre Dame

To quantify the social contribution of The University of Notre Dame, ACIL Allen considered all the channels through which the University makes a positive contribution to the local community of Fremantle and Western Australia.

Through its own research and analysis, and through collaboration with key stakeholders in the University of Notre Dame, ACIL Allen determined there were 15 types of social contributions which were grouped into the following four categories:

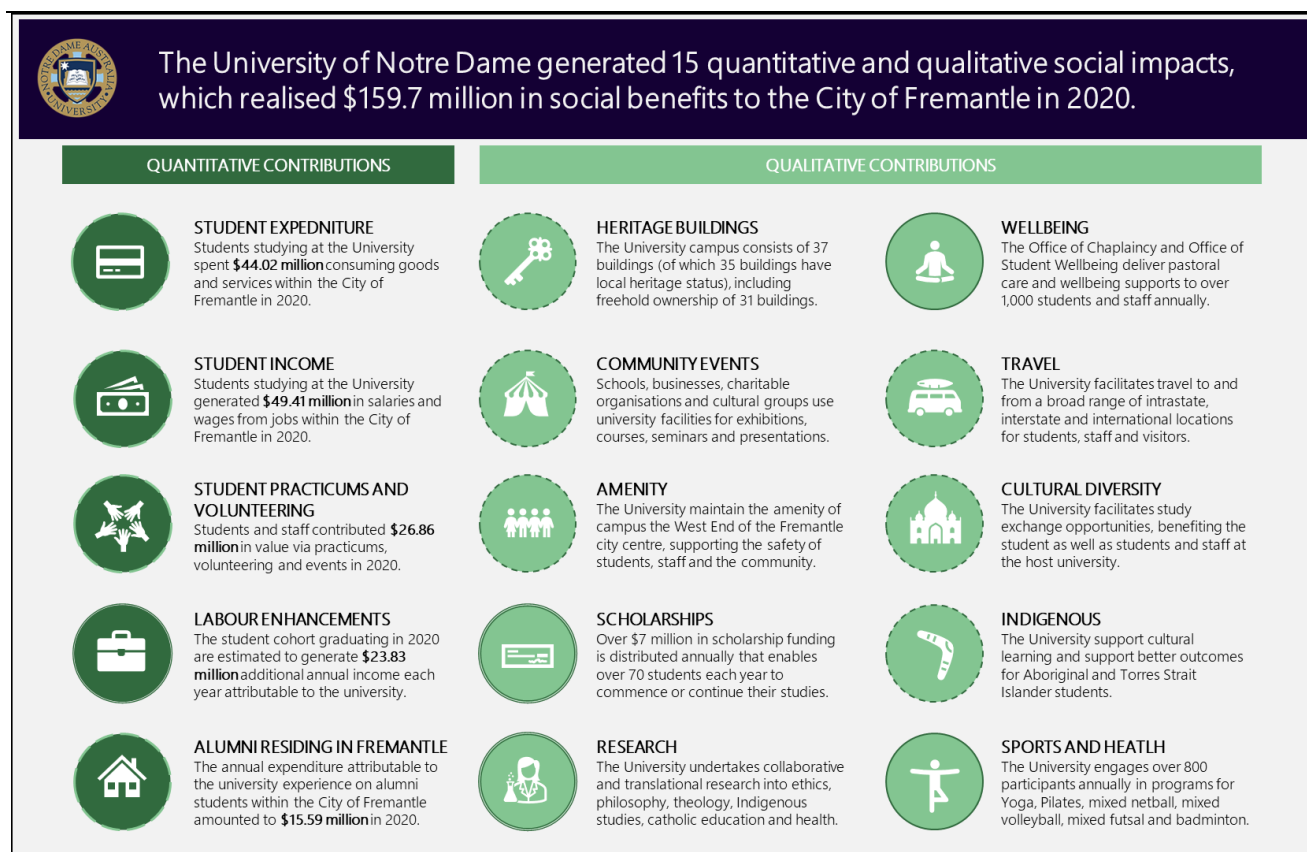
- **Social and Cultural benefits:** these benefits were *qualitatively assessed* for the purposes of this study, and include (1) the degree to which the University improves the level of amenity in the City of Fremantle; (2) the events and programs that support better outcomes for Aboriginal and Torres Strait Islander students; (3) its maintenance of heritage buildings in the City; (4) its support for travel to intrastate, interstate and international locations for students, staff and visitors; (5) in promoting cultural diversity through exchange opportunities; and (6) in supporting community events through the Campus facilities.
- **Local business and economic benefits:** these were *quantitatively assessed* by estimating (7) student expenditure on goods and services in the City; (8) the additional salaries and wages earned by students working in the City; (9) the expenditure of Alumni residing in Fremantle; and (10) the value assigned to students and staff in the City via practicums, volunteering and events.
- **Health and wellbeing benefits:** these were *qualitatively assessed* for the purposes of this study, and include (11) the benefits from University-run sports and health activities; and (12) the pastoral care and wellbeing supports and training from the Office of Chaplaincy and Office of Student Wellbeing.
- **Skills and capacity benefits:** (13) the value of improved employment outcomes resulting from the knowledge and skills of students studying at the University each year was *quantitatively assessed* in this study, with the benefit arising from (14) scholarship funding and (15) the University's research *qualitatively assessed*.

Through these four impact channels, ACIL Allen estimated the **University of Notre Dame conservatively generated an additional \$159.7 million in social benefits to the City of Fremantle in 2020.**

To put this into perspective, the **social impact of the University is 73% larger than the quantified economic contribution of the University to the City of Fremantle in 2020.** This demonstrates the “hidden” contribution of the University that is not captured through more traditional economic or financial impact models.

A summary of the overall social contribution of the University of Notre Dame to the City of Fremantle, and the impact channels that support this overall contribution, is presented in the figure below.

Figure ES 3 Social Contribution of the University of Notre Dame in 2020, \$m



Source: ACIL Allen

Note: narrow broken line = social and cultural benefits, broad broken line = business and economic benefits, solid line = health and wellbeing benefits, double line = skills and capacity benefits

Economic and Social Contribution of the University of Notre Dame: Summary Assessment

This study has helped to shed a light on the important contribution of the University across a number of economic and social dimensions. While the University is a visible presence in the City due to its occupancy of a number of heritage buildings in the West End of the City of Fremantle, its economic contribution is highlighted by the fact that in 2020 it generated \$92.6 million to the City of Fremantle, created and supported some 474 full time equivalent jobs, which taken together generated \$75 million in wages and salaries.

This study has also explored the social contribution that the University makes to the community within the City of Fremantle. ACIL Allen found that there were 15 social benefits that the University provides to the community, five of which were quantified for this study. Based on ACIL Allen's social contribution methodology, it is estimated that the University conservatively generated an additional \$159.7 million in social benefits to the City of Fremantle in 2020, which is 1.72 times the size of the total economic impact of the University to the City.

These results provide independent quantification that University of Notre Dame is an intrinsic part of the economic and social fabric of the City of Fremantle.



About this Report

1

This section provides an overview of the objectives of the report and the approach undertaken by ACIL Allen to quantifying the economic and social contribution of The University of Notre Dame.

1.1 Report context

The University of Notre Dame is a national Catholic University, with a city-based campus located in the historic City of Fremantle, as well as in the North-West town of Broome and the Sydney CBD. The University was established by an Act of the Parliament of Western Australia on 21 December 1989, with its first 50 postgraduate students enrolled in February 1992. Since then, the University has grown significantly, with some 12,000 students enrolled across a wide range of undergraduate and postgraduate programs, primarily at its Fremantle campus.

The establishment and growth of the University of Notre Dame's Fremantle campus has been a major coup for the City of Fremantle through its role supporting the gentrification of the West End, and boosting demand for products and services from local businesses from the influx of students and staff in the area. The combination of student and staff numbers at the Fremantle campus equates to in excess of approximately 8,000 individuals supporting the local Fremantle economy.

The University of Notre Dame's Fremantle campus is situated across a number of converted heritage buildings dating back to the late 1800s, as well as new purpose-built facilities. Properties purchased by the University of Notre Dame include old hotels, warehouses and parking lots, many of which were derelict and in disrepair. Since its establishment in the City of Fremantle, property purchases have steadily increased to accommodate a growing student population and the expansion into new academic disciplines.

While there is acknowledgement The University of Notre Dame is making a positive contribution to the West End and the City of Fremantle more broadly, to date this has never been quantified. To better understand the contribution the University of Notre Dame makes to the City of Fremantle and Western Australia, ACIL Allen was engaged to undertake an economic and social contribution study. It is anticipated the findings of the report will contribute to shaping future policy and planning decisions, in collaboration with the WA Government, City of Fremantle and local community groups.

While the higher education sector plays a critical role in the economy, analysis of this important role has generally focussed on how universities educate the future workforce and undertake important research. However, universities can also play an important economic development role to the extent that they are large employers in a city or a region. This is particularly so in relation to the University of Notre Dame as a large organisation with a large property footprint in the City of Fremantle. It is in relation to the localised economic and social impacts of the University of Notre Dame that this study is focussed.

1.2 Project methodology

In order to estimate the economic and social contribution of the University of Notre Dame to the City of Fremantle, ACIL Allen undertook two primary modelling tasks: **economic contribution modelling** to estimate the direct and indirect impact of the University on the City of Fremantle's economy; and **social contribution modelling** to quantify the broader social impacts of the University that cannot be quantified through an economic modelling framework.

To facilitate the economic impact modelling, ACIL Allen has sourced detailed financial and operational data of the University of Notre Dame and transformed this data into a series of model inputs such as expenditure, source of production and employment.

Using ACIL Allen's Input-Output model of the City of Fremantle and Western Australia, the economic contribution of The University of Notre Dame was estimated on the basis of its direct and indirect contribution to output, income, employment and taxation payments.

As a first step of the social contribution modelling, ACIL Allen developed an initial long list of benefit and impact streams attributable to The University of Notre Dame. Each initial benefit and impact stream was discussed and verified at a workshop facilitated by ACIL Allen with academic and administrative staff from the Fremantle campus. Following the workshop, ACIL Allen proceeded to filter down the initial long list of benefit and impact streams into those which could be readily quantified, those which could be quantified with adequate information and capacity, and those which were more likely to be non-quantifiable impacts. A finalised list of six quantitative benefits and nine qualitative benefits was determined.

ACIL Allen used operational data and information collected through the primary data request issued to The University of Notre Dame, as well as from academic and administrative staff following the workshop, to complete the social contribution assessment.

The level of engagement between ACIL Allen and The University of Notre Dame towards defining the scope of the economic and social contribution modelling and collecting the relevant data inputs was comprehensive and exceeded similar studies previously completed by ACIL Allen. This acknowledgement should provide added confidence for all relevant stakeholders on the robustness of the modelling results.

1.3 Report structure

The report has been structured into five key sections and an **Executive Summary**.

- **Section 1: Introduction and Context** - This section provides an overview of the objectives of the report and the approach to quantifying the economic and social contribution of the University of Notre Dame.
- **Section 2: University Overview and Outlook** - This section provides an overview of the objectives, history, operations and outlook of the University of Notre Dame, as well as an assessment of the emerging trends in the higher education sector in Western Australia.
- **Section 3: Economic Profile of the City of Fremantle** – This section provides an economic profile of the City of Fremantle and an overview of the channels through which the University of Notre Dame supports the local economy.
- **Section 4: Economic Contribution of The University of Notre Dame** - This section presents the results from the economic contribution assessment of the University of Notre Dame to the City of Fremantle and Western Australia.
- **Section 5: Social Contribution of The University of Notre Dame** - This section presents a social contribution assessment of the University of Notre Dame which considers all the

channels through the university makes a positive contribution to the local community of Fremantle and Western Australia.

1.4 Glossary of Terms and Abbreviations

Throughout this report, ACIL Allen has used a number of economic and industry-specific terms which have been outlined below.

Table 1.1 Glossary of Terms

Term Used	Description
Capital expenditure	This refers to all expenditures related to the development of capital assets such as buildings and infrastructure.
Full-Time Equivalent	ACIL Allen uses a definition for a Full-Time Equivalent job consistent with that used by the ABS – namely people who work, or usually work, 35 or more hours per week for the full year. FTE figures used in this report reflect a full-time job over one full year.
Gross product or real economic output	Gross product is a measure of the output generated by an economy over a period of time (typically a year). It represents the total dollar value of all finalised goods and services produced over a specific time period and is considered as a measure of the size of the economy. At a national level, it is referred to as Gross Domestic Product (GDP); at the state level, Gross State Product (GSP); while at a regional level, Gross Regional Product (GRP).
Input-Output Tables	Input-Output (IO) tables capture the direct and indirect effects of expenditure by capturing, for each industry, the industries it purchases inputs from and also the industries it sells its outputs to.

Table 1.2 List of Acronyms

Abbreviation	Full Name
ABS	Australian Bureau of Statistics
CAPEX	Capital expenditure
EFTSL	Equivalent full-time student load
FTE	Full Time Equivalent
IHR	Institute for Health Research
IO	Input-Output model
OPEX	Operational expenditure

University Overview and Outlook

2

This section provides an overview of the objectives, history, operations and outlook of the University of Notre Dame, as well as an assessment of the emerging trends in the higher education sector in Western Australia.

2.1 Overview of the University of Notre Dame

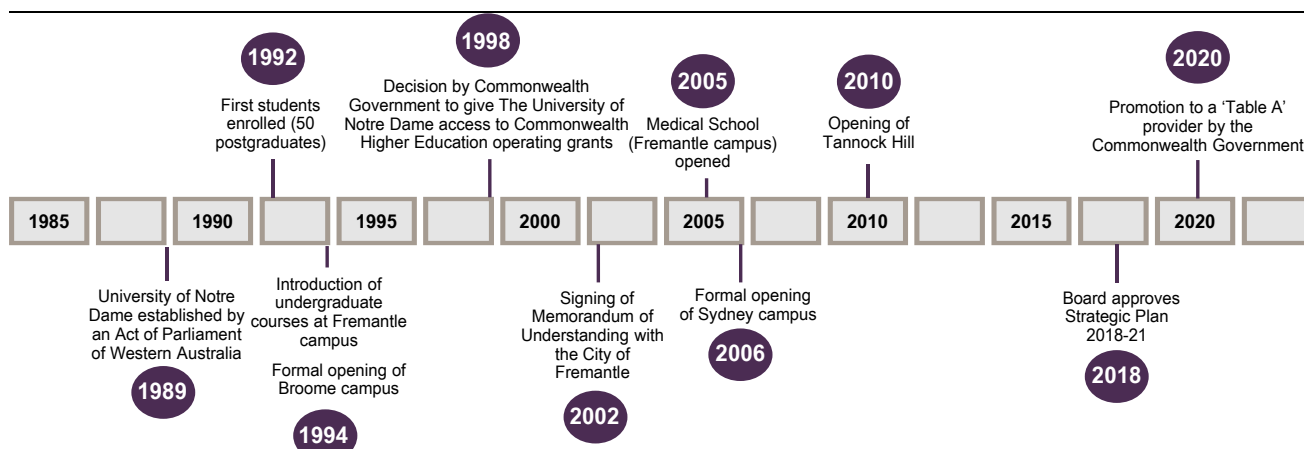
As a Catholic University, the University of Notre Dame embraces the ancient and esteemed traditions of Catholic Universities in Europe, North America and 2,000 years of Catholic Intellectual Tradition. The University of Notre Dame welcomes people of all faiths or none at all.

The principal activities of the University of Notre Dame stated through its Objects are:

- the provision of University education, within a context of Catholic faith and values; and
- the provision of an excellent standard of:
 - teaching, scholarship and research
 - training for the professions
 - pastoral care for its students

The origins of the University of Notre Dame stem back to the late 1980s when initial steps and planning for the establishment of a university commenced, formally culminating through an Act of Parliament in 1989 (**Figure 2.1**).

Figure 2.1 History of The University of Notre Dame – Fremantle campus



Source: Tannock, P. *The Founding and Establishment of The University of Notre Dame Australia 1986 – 2014* (2014)

The Archdiocese of Perth and the Catholic Education Commission of Western Australia had assessed there were inadequate means of providing special training for teachers to serve in the

State's growing Catholic school system, as well as professional health staff (in particular nurses) for the Catholic hospital system.

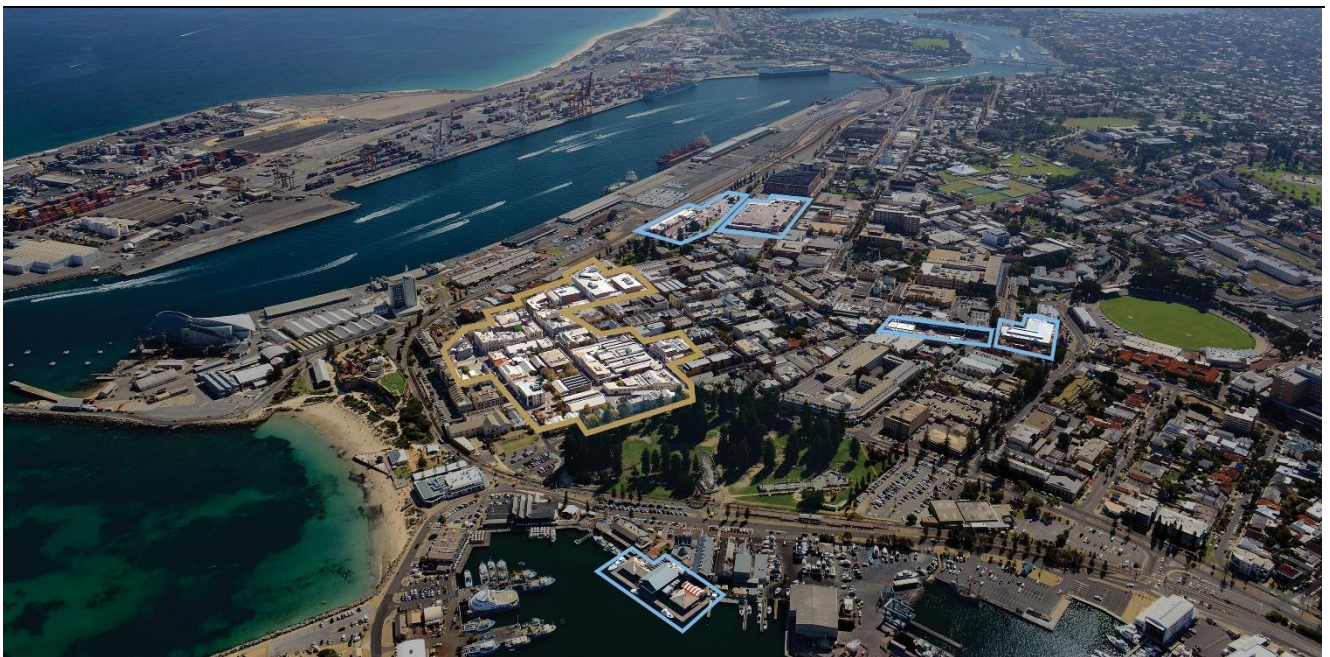
2.1.1 About the Fremantle Campus

The decision to base the University of Notre Dame in Fremantle was driven in part by the example set by other Catholic 'town universities' such as Georgetown University in Washington DC and the Catholic University of Louvain in Belgium.¹

The Fremantle city centre is characterised by deep layers of heritage. The University of Notre Dame's campus is located in the West End of the Fremantle city centre and is situated across a number of converted heritage buildings dating back to the late 1800s, as well as new purpose-built facilities. The West End consists of buildings characterised by late Georgian and Victorian-style architecture, with many original features still intact including the high ceilings, ornate cornices, timber-framed windows, archways, timber floorboards and internal piazza-styled entrance lobbies.

Properties purchased by the University of Notre Dame in the West End include old hotels, warehouses and parking lots. Despite many properties being derelict or in poor repair when purchased by the University of Notre Dame, they held promise for their development as educational facilities, given there were few other obvious alternative uses. For example, a former wool warehouse in Mouat Street was converted to Foley Hall and the University's central administration office. In addition to converted heritage buildings, The University has also developed a number of purpose-built facilities within the West End, such as the Tannock Hall of Education opened in 2010.

Figure 2.2 Aerial Photo of Fremantle Campus



Source: University of Notre Dame

Land holdings in the West End have steadily increased to accommodate a growing student population and the expansion into new academic disciplines. The University of Notre Dame offers students a range of on-campus and off-campus accommodation options. The Fremantle Campus Student Residences are located in the heart of the West End, in close proximity to shops, cafes, beaches, public transport and sport facilities.

¹ Tannock, P. The Founding and Establishment of The University of Notre Dame Australia 1986 – 2014 (2014)

2.1.2 Operations

From the beginning of the 2021 academic year, The University of Notre Dame transitioned to a new academic structure to increase the efficiency and effectiveness of academic administration (**Figure 2.3**). The new academic structure consists of eight schools and three research institutes amalgamated under the following three national faculties:

- Faculty of Medicine, Nursing, Midwifery and Health Sciences
- Faculty of Education and Philosophy & Theology
- Faculty of Arts & Sciences and Law & Business

The University of Notre Dame has three research institutes that provide leadership in collaborative research initiatives. The Institute for Health Research (IHR) is based at the Fremantle campus, while the Institute for Ethics & Society and the Nulungu Research Institute are based in Sydney and Broome respectively.

Figure 2.3 University of Notre Dame – Academic Structure

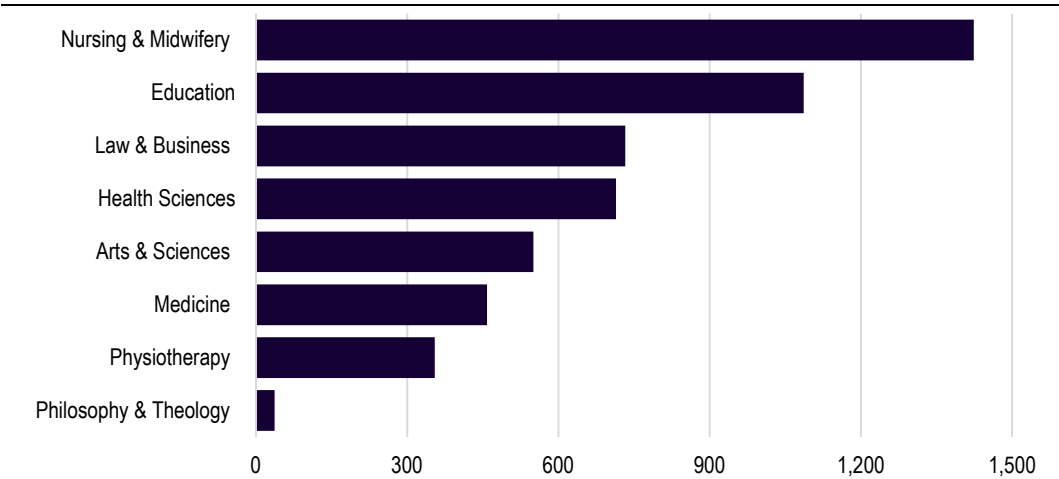
Faculty of Medicine, Nursing, Midwifery and Health Sciences	Faculty of Education and Philosophy & Theology	Faculty of Arts & Sciences and Law & Business
SCHOOL	SCHOOL	SCHOOL
<ul style="list-style-type: none"> ▪ Medicine ▪ Nursing & Midwifery ▪ Health Sciences ▪ Physiotherapy 	<ul style="list-style-type: none"> ▪ Education ▪ Philosophy & Theology 	<ul style="list-style-type: none"> ▪ Arts & Sciences ▪ Law & Business
RESEARCH INSTITUTES	RESEARCH INSTITUTES	RESEARCH INSTITUTES
<ul style="list-style-type: none"> ▪ Institute for Health Research (Fremantle) 	<ul style="list-style-type: none"> ▪ Institute for Ethics & Society (Sydney) 	<ul style="list-style-type: none"> ▪ Nulungu Research Institute (Broome)

Source: University of Notre Dame – Undergraduate Guide (2022)

Figure 2.4 presents the equivalent full-time student load (EFTSL) by school at the Fremantle campus for the 2020 academic year. On the basis of EFTSL, the School of Nursing & Midwifery is the largest school at the Fremantle with an EFTSL of 1,424, accounting for approximately 26.6 per cent of total EFTSL. The School of Education and School of Law & Business are the next largest schools at the Fremantle campus with an EFTSL of 1,087 and 732 respectively.

Core Curriculum courses in Philosophy, Theology and Ethics are a component of all degrees at The University of Notre Dame. The program helps to achieve a range of objectives including providing a liberal education base for the wide range of professional courses undertaken by most undergraduate students prior to entry to their chosen vocation.

Figure 2.4 EFTSL By School at Fremantle Campus (2020)



Note: Excludes EFTSL allocated to Study Abroad Office, Research Office and Notre Dame Study Centre
Note: EFTSL is the preferred measure for student numbers as it removes the duplication of the same student across different schools.
Source: University of Notre Dame

The University of Notre Dame has finalised its 2022-26 Strategic Plan, which will help to build on the University’s history and distinctiveness, enhancing the university’s positive impact on the community and securing future financial and research viability.

As presented in **Figure 2.5**, the 2022-26 Strategic Plan is underpinned by the five pillars of educating for the common good, integrating practice and knowledge, transformative research, integral human development and universality. The pillars acknowledge the opportunity to build on existing strengths of the University such as its reputation as an outstanding provider of student skills development and its personalised student offering.

Figure 2.5 Pillars of the 2022-26 Strategic Plan



Source: The University of Notre Dame

Core elements of the vision for The University of Notre Dame presented in the Strategic Plan have alignment to the ten-year vision for Fremantle outlined in the City of Fremantle's current Strategic Community Plan.

The City of Fremantle 2015-25 Strategic Community Plan is the overarching document which sets out the vision, outcomes and objectives of the local community over a ten-year period. The Strategic Community Plan was developed through an extensive community consultation process which established six 'community visioning themes'. These themes were subsequently used by the City of Fremantle to establish the seven strategic focus areas underpinning the Strategic Community Plan (**Figure 2.7**).

Figure 2.6 City of Fremantle Strategic Community Plan – Strategic Focus Areas

1	Economic development Diversify and strengthen Fremantle's economic capacity.
2	Environmental responsibility Work with the community to develop environmentally sustainable solutions for the benefit of current and future generations.
3	Transport and connectivity Enhance the connectivity throughout the city of Fremantle and other strategic economic hubs and population centres.
4	Character, culture and heritage Sustain and grow arts and culture and preserve and promote the importance of our social capital, built heritage and history (both pre- and post-European settlement).
5	Places for people Create great spaces for people through innovative urban and suburban design.
6	Health and happiness Creating a physical and social environment where it is easy for people to lead safe, happy and healthy lives.
7	Capability An innovative, responsive, influential local government which leads the way in delivering services and projects through good governance, effective communication, responsible management and excellence in delivery

Source: City of Fremantle Strategic Community Plan (2019 update)

There are a number of channels through which the strategic focus areas in the Strategic Community Plan, and each of their set of objectives and measures of success, are aligned to the activities of The University of Notre Dame. The four strategic focus areas which have the strongest alignment to The University of Notre Dame are economic development, character, culture and heritage, places for people, and health and happiness.

As a significant employer and established presence within the City, The University of Notre Dame supports the City of Fremantle's focus on diversifying and strengthening its economic capacity through a number of channels, including:

- improving the resilience of the weekday economy through staff and student expenditure;
- increasing the number of sustainable higher value land uses and development through additional building acquisitions in the West End;
- building on Fremantle's existing strengths in key service industries such as education, health, tourism and creative industries;
- preserving and promoting the City's social capital, built heritage and history through its ongoing maintenance of the University's property portfolio in the West End;

- strengthening the sense of place through initiatives such as heritage tours of the campus;
- creating a physical and social environment where it is easy for people to lead safe, happy and healthy lives through its public spaces throughout the campus, and by improving community inclusiveness and participation through its volunteer programs, community events, and sport and recreation programs; and
- creating innovative public spaces for the Fremantle community

Key Finding 1 Alignment to the City of Fremantle Strategic Community Plan

The activities of The University of Notre Dame are strongly aligned to the ten-year vision for Fremantle outlined in the current Strategic Community Plan, and in particular through the four strategic focus areas of economic development, character, culture and heritage, places for people, and health and happiness.

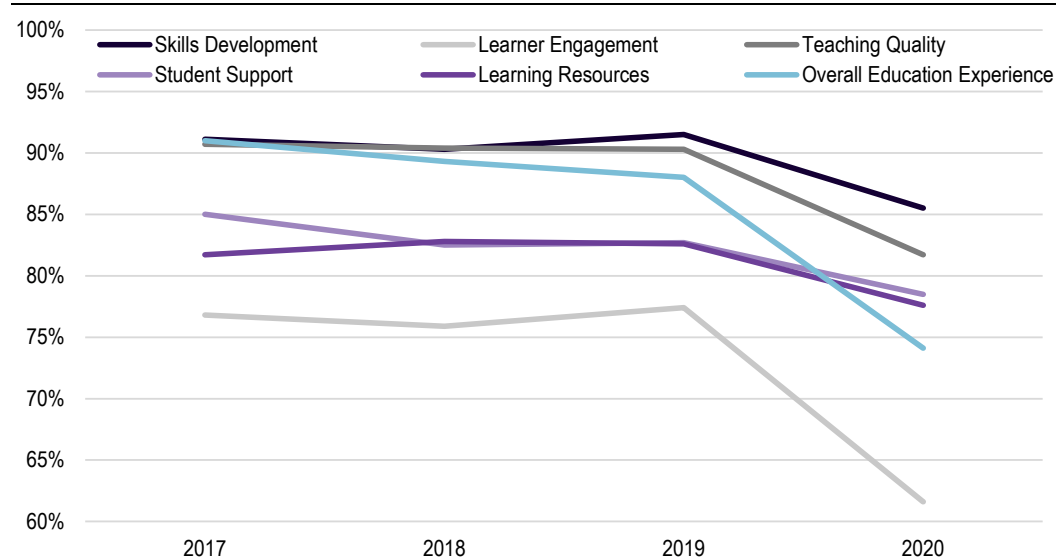
2.2 Performance

The University of Notre Dame has built a strong reputation for the quality of its teaching and pastoral care, and for its preparation of graduates for entry into professional work.

The Student Experience Survey (SES) collects data on key aspects of the higher education student experience for all universities in Australia. The SES measures five aspects of the student experience – Skills Development, Learner Engagement, Teaching Quality, Student Support and Learning Resources. The SES also includes a rating for the Overall Education Experience.

In 2020, the higher education sector was subject to substantial challenges arising from the COVID-19 pandemic. The University of Notre Dame, in line with other higher education institutions, recorded a reduction in student ratings across all indicators contained in the SES in 2020 (**Figure 2.7**). In each of the three years prior to the COVID-19 pandemic, The University of Notre Dame recorded a rating for Overall Education Experience greater than 85 per cent.

Figure 2.7 University of Notre Dame – Undergraduate student experience (% positive rating)



Source: Quality Indicators for Learning and Teaching (QILT) – Student Experience Survey (2020)

Over the three years from 2017 to 2019, the University of Notre Dame was the top ranked Western Australian university for Skills Development, Learner Engagement, Teaching Quality, Student Support and Overall Education Experience (**Table 2.1**). In 2020, the University of Notre Dame

retained its top rank for Learner Engagement, and fell to second place for the other three indicators.

Table 2.1 University of Notre Dame – Ranking against other Western Australian universities

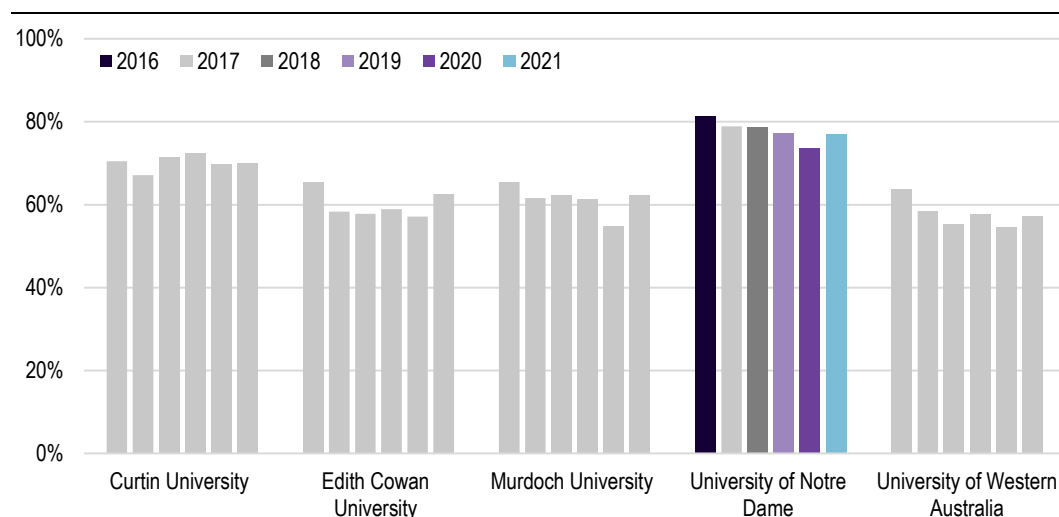
Indicator	2017	2018	2019	2020
Skills Development	1	1	1	2
Learner Engagement	1	1	1	1
Teaching Quality	1	1	1	2
Student Support	1	1	1	2
Learning Resources	4	5	5	5
Overall Education Experience	1	1	1	2

Source: Quality Indicators for Learning and Teaching (QILT) – Student Experience Survey (2020)

The full-time employment rate accounts for graduates employed full-time, as a proportion of those available for full-time work. Since 2016, the University of Notre Dame has been the top ranked university in Western Australia for this indicator, with an average of 77.9 per cent across the last six reporting years and only one year (73.8 per cent) when the share fell below 75 per cent (**Figure 2.8**).

The overall employment rate accounts for employed graduates (including in full-time, part-time or casual employment), as a proportion of those available for employment. The University of Notre Dame has delivered strong performance on this indicator with an average share of 89.6 per cent across the last six reporting years, which was the highest share across the Western Australian universities.

Figure 2.8 Undergraduate full-time employment outcomes



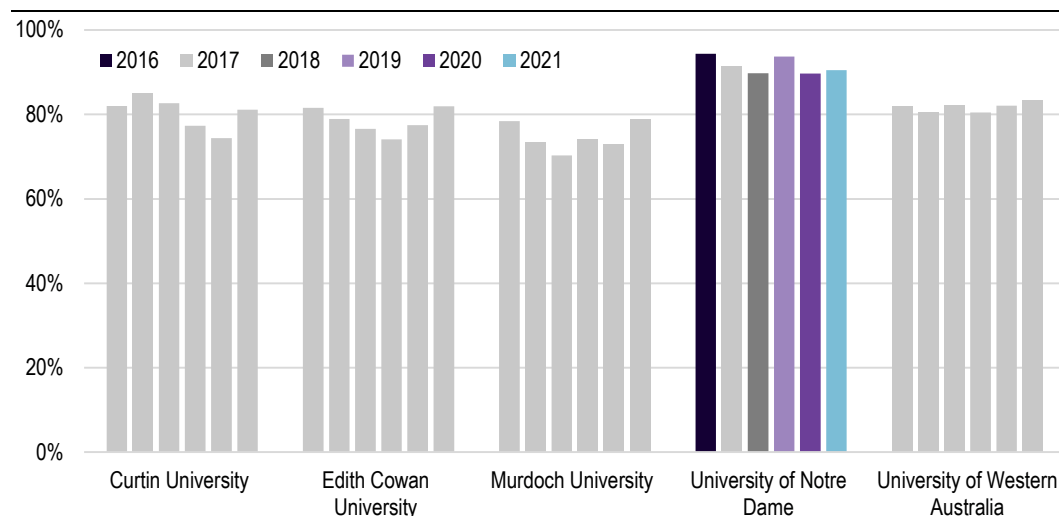
Source: Quality Indicators for Learning and Teaching (QILT) – Graduate Outcomes Survey (2021)

For postgraduate coursework graduates, the University of Notre Dame is the strongest performer of all Western Australian universities with an average full-time employment rate of 91.6 per cent across the last six reporting years (**Figure 2.9**). The second highest average full-time employment rate for postgraduate coursework graduates was the University of Western Australia at 81.8 per cent.

The Graduate Outcomes Survey – Longitudinal (GOS-L) measures the medium-term outcomes of higher education graduates based on a cohort analysis of graduates who responded to a Graduate Outcomes Survey on graduation. Medium-term is defined as three years after graduation. For

example, the cohort of graduates for the GOS-L in 2021 are individuals who responded to the 2018 Graduate Outcomes Survey.

Figure 2.9 Postgraduate coursework full-time employment outcomes



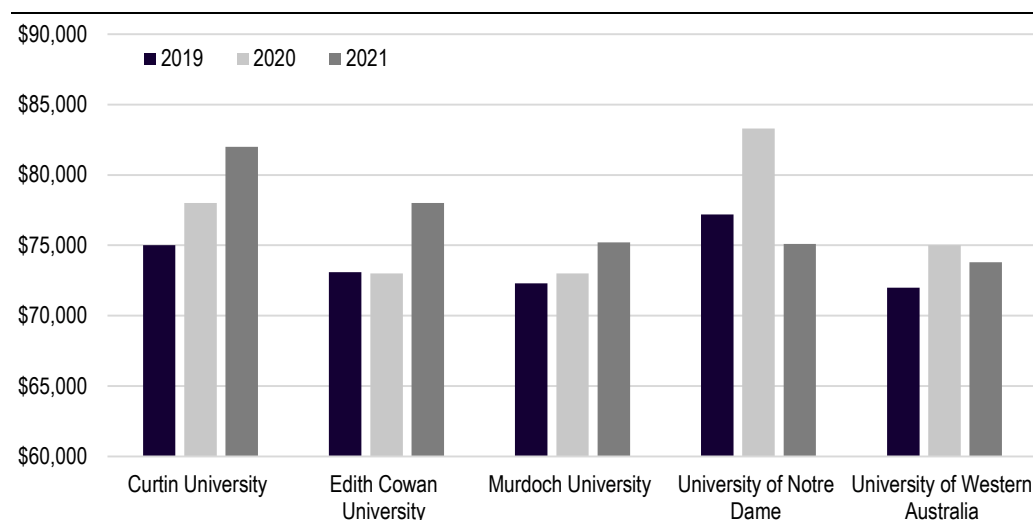
Source: Quality Indicators for Learning and Teaching (QILT) – Graduate Outcomes Survey (2021)

The University of Notre Dame has recorded the highest medium-term undergraduate full-time employment rate over the past three years across all Western Australian universities. The University of Notre Dame has recorded an average medium-term undergraduate full-time employment rate over the past three years of 92.4 per cent and was the only Western Australian university above 90 per cent in 2021.

In 2021, the University of Notre Dame had an undergraduate median full-time salary of \$67,600. This was the third highest across Western Australian universities, behind Curtin University (\$70,000) and Edith Cowan University (\$69,000).

In 2019 and 2020, the University of Notre Dame recorded the highest medium-term undergraduate median full-time employment salary (**Figure 2.10**).

Figure 2.10 Medium-term undergraduate median full-time employment salary



Source: Quality Indicators for Learning and Teaching (QILT) – Graduate Outcomes Survey – Longitudinal (2021)

In 2021, the ranking for this indicator fell to fourth, however remained above \$75,000 for third consecutive year, a result which was only bettered by Curtin University.

Excellence in Research for Australia (ERA) is a research quality and evaluation assessment developed by the Australian Research Council (ARC) in conjunction with the Department of Education. There are four broad indicator categories which are used to develop the ERA ratings which are research quality, research volume and activity, research application and recognition.

In the 2018 ERA Rankings, which was the most recent set of reporting, The University of Notre Dame ranked 39th across all Australian universities. While this was the lowest ranking for the major universities in Western Australia², this reflects the University of Notre Dame's greater focus on teaching time requirements for academic staff.

Key Finding 2 Performance of the University of Notre Dame

The results achieved by The University of Notre Dame in the Student Experience Survey and Graduate Outcomes Survey support its strong reputation for the quality of its teaching and pastoral care, as well as its preparation of graduates for entry into professional work.

Over the three years from 2017 to 2019, the University of Notre Dame was the top ranked Western Australian university for Skills Development, Learner Engagement, Teaching Quality, Student Support and Overall Education Experience. Since 2016, The University of Notre Dame has been the top ranked WA university for undergraduate full-time employment outcomes, with an average of 77.9 per cent over the last six reporting years.

2.3 Importance of higher education sector in Western Australia

The five major universities in the Western Australian higher education sector compete across a range of dimensions such as the attraction of undergraduate students, postgraduate students, international students, academic staff and grant funding for research projects.

The contribution of the higher education sector in Western Australia can be assessed with consideration to both the economic activity generated by the operations of higher education institutions, as well as the contribution to the productive capacity of the WA economy through teaching and learning, research discovery and adoption, and community service activities.

Universities are increasingly working with industry to improve alignment between graduate skills and industry needs. In line with this, universities are developing courses that are flexible and enable re-skilling and continuing professional development. This is due in part to the rapid technological advancements in the major industries in the WA economy such as mining, as well as more stringent education accreditation requirements for industries such as financial services.

The growth of Western Australia's international education sector has been a priority economic development objective for the McGowan Government since coming to power in 2017. This was acknowledged through the international education sector's identification as one of six priority sectors in the WA Government's economic development framework Diversify WA. Diversify WA highlights international education as one of six priority sectors based on the clear opportunity for WA to grow its international presence and brand as an education destination, underpinned by increasing urbanisation and a growing number of consumers in key source markets seeking a quality education alongside a healthy and vibrant lifestyle.

² The University of Western Australia was the top ranked at 7th, followed by Curtin University (16th), Murdoch University (25th) and Edith Cowan University (32nd).

Key Finding 3 Importance of Higher Education Sector in Western Australia

The higher education sector is a critical component of the Western Australian economy due to the economic activity directly generated by the operations of institutions, such as The University of Notre Dame, as well as their contribution to the productive capacity of the economy through teaching and learning, research discovery and adoption, and community service activities.

Economic Profile of the City of Fremantle

3

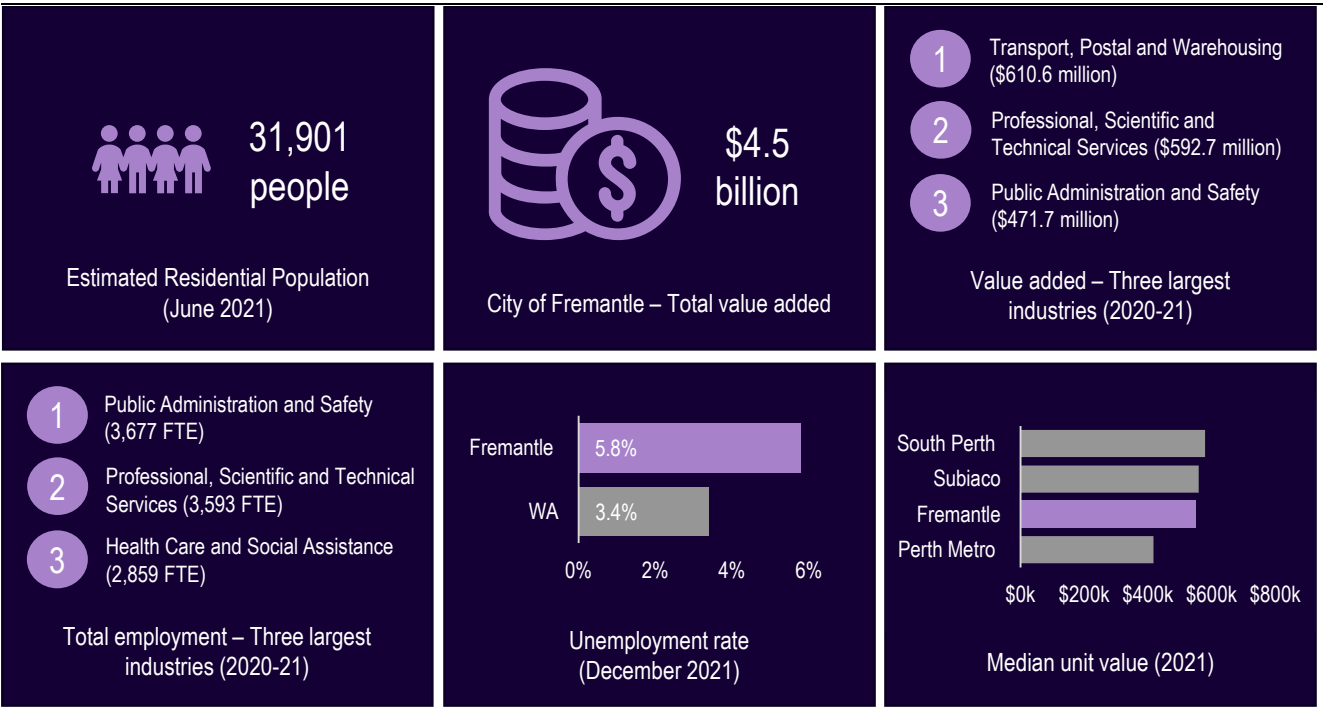
This section provides an economic profile of the City of Fremantle and an overview of the channels through which the University of Notre Dame supports the local economy.

3.1 Summary profile

The City of Fremantle is a local government authority located 20km south of the Perth CBD comprising the suburbs of Beaconsfield, Fremantle, Hilton, North Fremantle, O'Connor, Samson, South Fremantle and White Gum Valley. The Town of Fremantle Council was founded in 1871 and in 1929 it gained “city status”. Today, the City services approximately 30,000 residents over a land area of 19 square kilometres, and is home to the state’s busiest and most important cargo port, handling 30 million tonnes of cargo per year.

A Summary Profile of the City of Fremantle across a range of economic indicators is presented below in **Figure 3.1**. Historical trends and key insights relating to each economic indicator is explored by ACIL Allen in greater detail throughout the remainder of this section.

Figure 3.1 City of Fremantle Summary Profile



Source: ACIL Allen

3.2 Economy

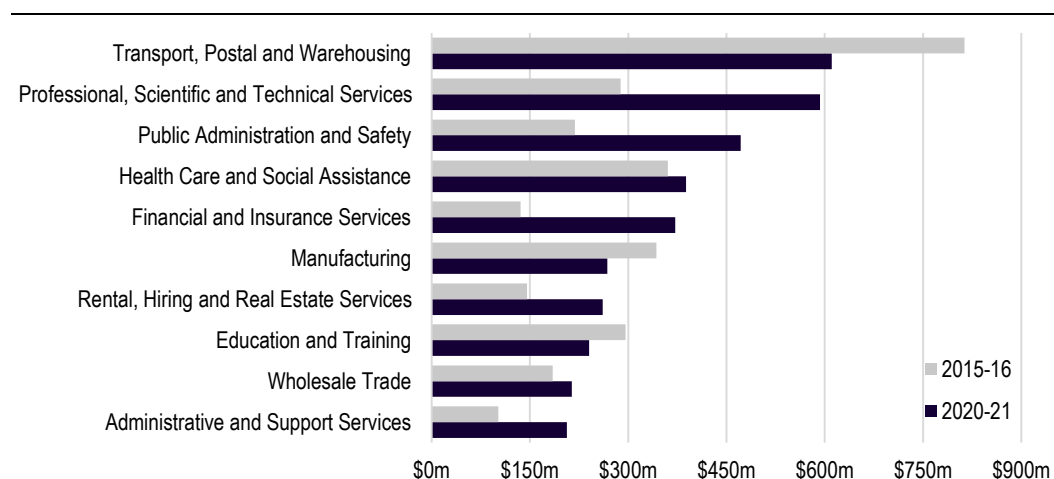
In the lead up to World War II the main industries in Fremantle were shipbuilding, soap boiling, saw milling, smelting, iron founding, furniture making, flour milling, brewing and animal skin tanning. The industry composition of the Fremantle economy shifted in the second half of the 20th century due to a range of planning and infrastructure developments. On the western edge of the city centre, a significant portion of the land was reclaimed creating public spaces, the Fishing Boat Harbour and the Fremantle Inner Harbour, including Victoria Quay. Complementing this was the declining presence of shipping, port and fishing businesses in the West End, partly due to relocations to the Australian Marine Complex (AMC) at Henderson. Over this period, there was also an artificially stimulated gentrification process resulting from the tourism boost linked to the America's Cup.

Over time, Fremantle has developed a more diversified industry base, driven in part by technology advancements and consumer demands. Despite this, the operations and ancillary businesses in the maritime industry associated with Fremantle Port remains the central element of the local economy, and a vital articulation point between the global economy and Western Australia.

Today, the Fremantle economy generates billions in economic value to the State, reaching \$4.5 billion in 2020-21. The Fremantle economy retains its historic links, with the Transport, Postal and Warehousing industry – which is largely represented by the activities associated with the Port of Fremantle – accounting for 13.6 per cent of the economic value. However, this industry is a less dominant economic force than it has been historically, with the Fremantle economy diversifying towards more services orientated industries.

Figure 3.2 compares the value added by industry for the City of Fremantle between 2015-16 and 2020-21. In 2020-21, the three largest industries in the City of Fremantle were Transport, Postal and Warehousing (\$610.6 million), Professional, Scientific and Technical Services (\$592.7 million) and Public Administration and Safety (\$471.7 million).

Figure 3.2 City of Fremantle – Value Added – Ten largest industries



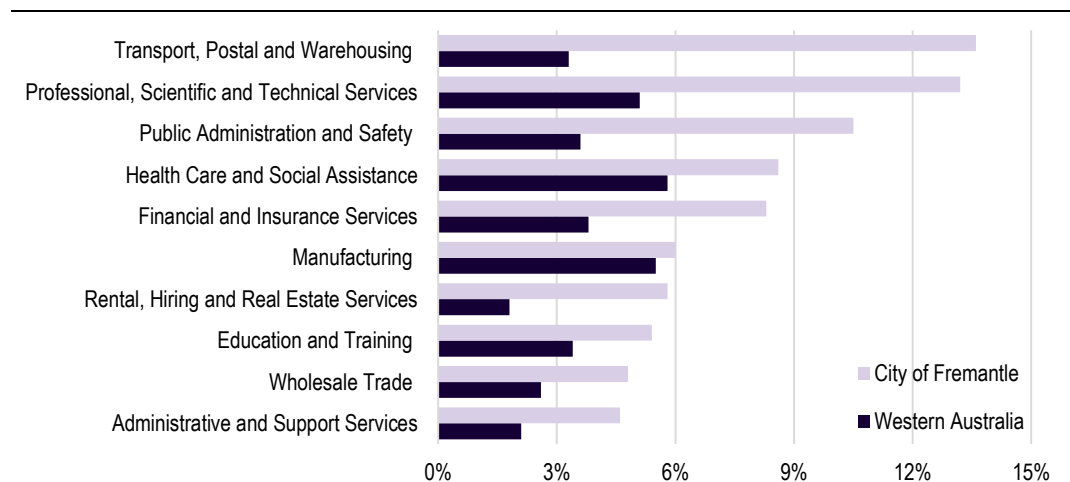
Source: National Institute of Economic and Industry Research

While Transport, Postal and Warehousing has declined by 25 per cent since 2015-16, the Professional, Scientific and Technical Services and Public Administration and Safety industries have more than doubled over the same period, reflecting the changing nature of the Fremantle economy.

The contribution of the Public Administration and Safety industry to the local economy is expected to increase further in the coming years following the relocation of the Department of Communities head office to Fremantle in 2020 as part of the Walyalup Koort (formally Kings Square)

development. With the addition of workers from the Department of Transport's maritime business unit, this has resulted in the relocation of approximately 1,900 public sector workers to Fremantle. While the anticipated boost to the Fremantle economy from the relocation of these workers has been delayed by the COVID-19 pandemic, it is expected that once workers return to more regular hours in the office, this will provide an important stimulus to the local economy.

Figure 3.3 Share of Total Value Added compared to Western Australia (2020-21)



Source: National Institute of Economic and Industry Research

Figure 3.3 compares the share of the total value added accounted for by each of the ten largest industries in the City of Fremantle to the share accounted for by the same industries in the broader WA economy. Overall, the economic structure of the City of Fremantle is more focussed towards services industries relative to the broader WA economy, which is dominated by its mining industry. Mining accounts for 45 per cent of the total value added for the WA economy, but just 2.7 per cent of total value added of the Fremantle economy. By contrast, the Transport, Postal and Warehousing industry only accounts for 3.3 per cent of the total value added of the WA economy, compared to 13.6 per cent of the total value added for the City of Fremantle. The City of Fremantle's economy also has a greater economic contribution from all key service industries, including the Education and Training industry.

Urban development has placed pressure on freight access in and out of the Fremantle Inner Harbour. It is expected over the coming decades it may pose as a critical constraint to trade moving in and out of Western Australia. Westport is the State Government's long-term program to investigate, plan and build a future port in Kwinana with integrated road and rail transport networks. An Outer Harbour at Kwinana would build WA's capacity to manage growing freight demand and an opportunity to modernise container trade operations.

The Westport Planning Program is currently in Stage 3 (Business case and definition design) which will provide advice to the WA Government about when and how a new Kwinana port and logistics network should be developed. A component of this stage is considering the long-term future of Fremantle's port precinct and surrounding land.

A Future of Fremantle Planning Committee, administered by the WA Planning Commission, has been created to develop a vision for the longer-term redevelopment of the Inner Harbour. The Committee includes representatives from State Government agencies, Fremantle Ports, local businesses, industry, local government and the Fremantle community.

A focus of the Future of Fremantle Planning Committee and an evolving issue for local stakeholders is how local jobs can be maintained while the port transitions from an inner harbour to other land uses and connections to marine based economic activity can continue, acknowledging

businesses servicing the marine industry, such as within the Rous Head service industrial area, are likely to relocate their operations closer to a new container port at Kwinana.

Key Finding 4 The evolution and diversification of the Fremantle economy

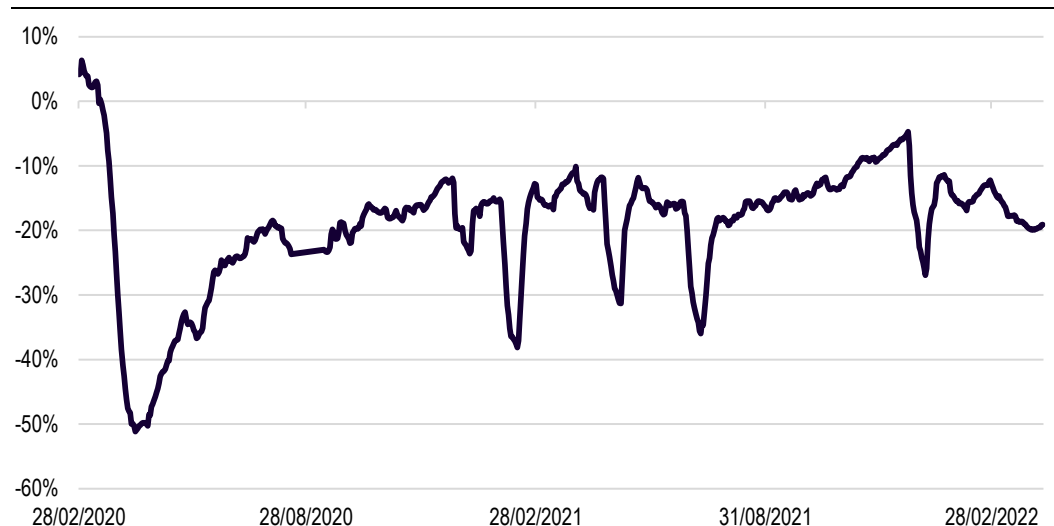
Fremantle is a vital articulation point between the global economy and Western Australia. While the operations and ancillary businesses in the maritime industry associated with Fremantle Port remain the central element of the local economy, this industry is a less dominant economic force than it has been historically, with the economy diversifying towards more services orientated industries, including Education and Training.

Relative to the broader Western Australian economy, the City of Fremantle is driven by a growing range of services industries, including Professional, Scientific and Technical Services, and Public Administration and Safety – the latter of which will be further boosted over time following the relocation of the Department of Communities and the Department of Transport's maritime business unit to the City, which will bring approximately 1,900 public sector workers to Fremantle.

In the medium to long term, the Westport outer harbour development is anticipated to generate new opportunities for the Fremantle economy.

Recent trends have indicated COVID-19 has significantly impacted local, national and global economies. In the City of Fremantle, retail and hospitality is one industry of the local economy that has been impacted by COVID-19 due to a decline in foot traffic as a result of travel restrictions limiting interstate and overseas visitor activity. Google Mobility data suggests activity in the Fremantle city centre as of April 2022 is approximately 20 per cent down on the pre-COVID baseline (**Figure 3.5**).

Figure 3.4 Google Mobility Index, City of Fremantle, 28 February 2020 to 10 April 2022, Pre-COVID = 0



Note: Google Mobility Index categories weighted at Retail and Recreation (30%), Grocery and Pharmacy (10%), Parks (10%), Transit stations (20%) and Workplaces (30%).

Source: Google

In the initial months of the COVID-19 pandemic, activity in the Fremantle city centre dropped to as low as 50 per cent below the pre COVID baseline. In the second quarter of 2020, there was a strong recovery in activity to reach a steady range of between 10 to 20 per cent. This has been maintained over the majority of the last 18 months, with the closest level of activity relative to the pre-COVID baseline achieved in November to December 2020.

As a comparison, Google Mobility data for the City of Perth indicates activity dropped to as low as 70 per cent below the pre-COVID baseline in the initial months of the COVID-19 pandemic. As of

April 2022, prior to the lifting of the mask mandate, activity in the City of Perth is approximately 30 per cent down on the pre-COVID baseline.

Despite recent headwinds on the retail and hospitality sector in Fremantle, the city centre has been historically renowned for offering a bespoke retail experience through a range of specialty retail outlets. The Fremantle Markets, the most well-known market in Western Australia, is central to maintaining a bespoke retail experience in Fremantle. The viability of the City's retail and hospitality offerings has been supported through the pandemic years by organisations such as The University of Notre Dame from the expenditure from students and staff. This was a particularly important source of expenditure for local businesses during the pandemic when Fremantle experienced a sharp decline in visitation from interstate and international tourists and the delays in the full realisation of the benefits associated with the relocation of public sector workers from the Department of Communities and Department of Transport.

Key Finding 5 COVID-19 and the Fremantle economy

Expenditure from students and staff at The University of Notre Dame have supported the local retail and hospitality sector at a time where there has been a sharp decline in interstate and international tourist visitation and the anticipated uplift in consumer activity linked to the relocation of public sector workers from the Department of Communities and Department of Transport has not been realised.

3.3 Labour market

In 2020-21, the City of Fremantle had an employed workforce (full-time equivalent) of 26,980 people, an increase of 8.2 per cent on the employed workforce in 2015-16.

Figure 3.6 presents total employment for the ten largest industries in the City of Fremantle in 2020-21 and 2015-16. In 2020-21, the three largest industries in the City of Fremantle were Public Administration and Safety (4,253 people), Professional, Scientific and Technical Services (3,798 people) and Health Care and Social Assistance (3,653 people). The total workforce in the Public Administration and Safety and Professional, Scientific and Technical Services industries has more than doubled since 2015-16.

Of the ten largest industries, the only other industry to record an increase since 2015-16 was Administrative and Support Services which grew by 112 per cent. In contrast, the sharpest declines recorded from the ten largest industries were in Construction (32 per cent), Manufacturing (23 per cent) and Education and Training (15 per cent).

In line with its economic focus, the City of Fremantle has a significantly greater share of people employed in Public Administration and Safety, Transport, Postal and Warehousing and Professional, Scientific and Technical Services industries relative to the broader WA economy.

Figure 3.5 City of Fremantle – Total employment by industry

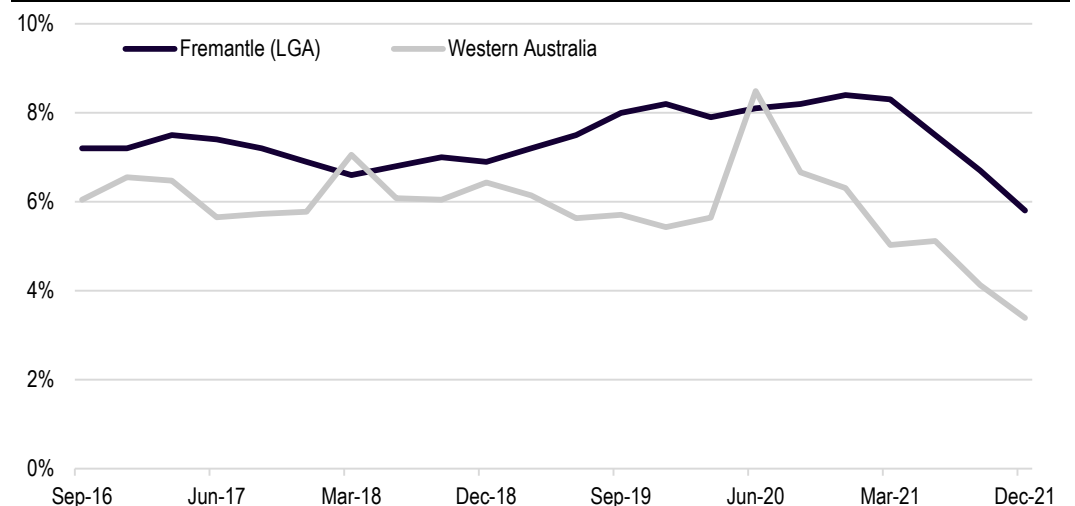


Note: Total employment estimates the number of persons employed full-time and part-time in the City of Fremantle regardless of where they live.

Source: National Institute of Economic and Industry Research

The trends in the City's labour market closely follow the broader trends in the WA economy, albeit with slightly higher rates of unemployment. In December 2021, the City of Fremantle recorded an unemployment rate of 5.8 per cent, which was down from the COVID-induced peak of 8.4 per cent one year prior. This was the lowest unemployment rate recorded in the City of Fremantle since the commencement of the small area labour market dataset in December 2010. The unemployment rate in the City of Fremantle has historically exceeded the unemployment rate for Western Australia. Since September 2016, there have only been two occasions where the unemployment rate for the City of Fremantle fell below Western Australia (March 2018 and June 2020). The gap between the two unemployment rates increased over the past 18 months, peaking at 3.3 per cent in March 2021 (**Figure 3.7**).

Figure 3.6 Unemployment Rate



Source: ABS Cat. 6202.0 Labour Force (Western Australia), National Skills Commission Small Area Labour Markets (City of Fremantle)

Key Finding 6 Labour Market

In 2020-21, the three largest industries for total employment in the City of Fremantle are Public Administration and Safety (4,253 people), Professional, Scientific and Technical Services (3,798 people), and Health Care and Social Assistance (3,653 people). In comparison to the broader WA economy, the City of Fremantle has a significantly greater share of people employed in Public Administration and Safety, Transport, Postal and Warehousing and Professional, Scientific and Technical Services.

In December 2021, the City of Fremantle recorded an unemployment rate of 5.8 per cent, which was down from the COVID-induced peak of 8.4 per cent one year prior. The unemployment rate in the City of Fremantle has historically exceeded the unemployment rate for Western Australia, with the gap increasing over the past 18 months.

3.4 Population

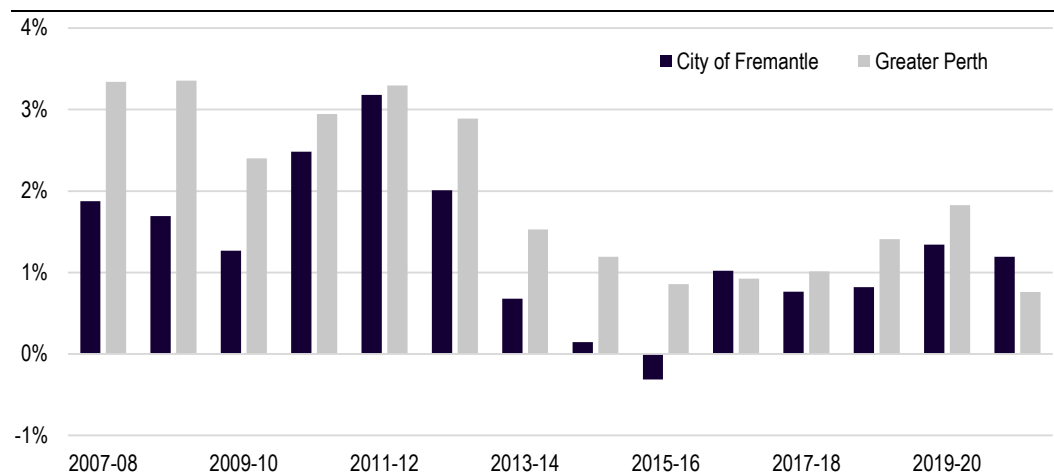
The estimated resident population (ERP) of the City of Fremantle (LGA) as of June 2021 is 31,901 people. Over the past five years, the average annual population growth rate for the City of Fremantle was 1.03 per cent, marginally below its ten-year average annual population growth rate of 1.08 per cent.

As of June 2021, the ERP of the City of Fremantle exceeds the City of Perth by approximately 660 people, however the difference in the ERP for the two local governments has narrowed over the past decade. Based on the ten-year average annual population growth rate for the two respective local governments, the ERP of the City of Perth is forecast to overtake the City of Fremantle by June 2022.

The resident population of the City of Fremantle has grown at a slower rate relative to other major inner-city LGAs in the Perth Metropolitan Area such as the City of Perth, Town of Victoria Park and City of Vincent. The average annual population growth rate of the City of Fremantle since 2006-07 was 1.34 per cent, compared to the City of Perth (4.95 per cent), Town of Victoria Park (1.72 per cent) and City of Vincent (1.59 per cent).

As presented in **Figure 3.8**, the City of Fremantle has consistently recorded an annual population growth rate below the growth rate recorded in the Greater Perth region.

Figure 3.7 Percentage Change in ERP – City of Fremantle compared to Greater Perth



Source: ABS – Regional Population Growth (Cat. 3218.0)

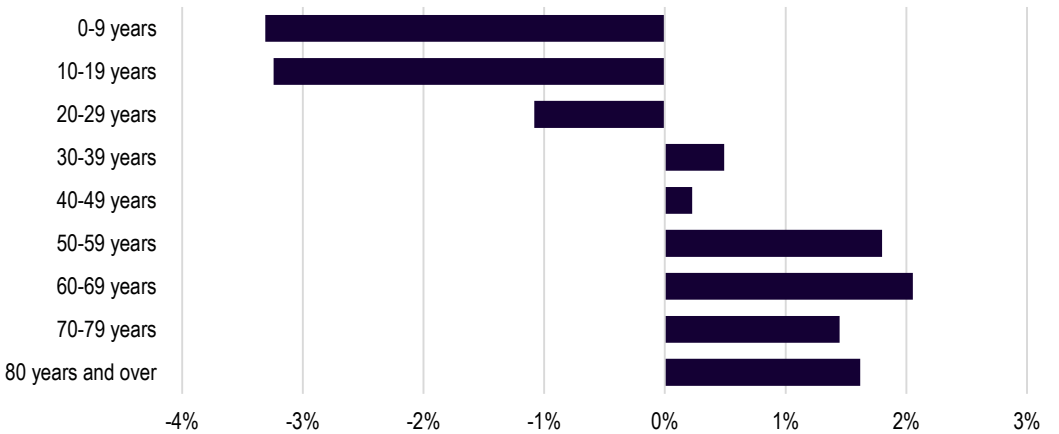
Over the past 14 years, the City of Fremantle has recorded an annual population growth rate above the Greater Perth region on only two occasions in 2016-17 and 2020-21. However, more recently,

the annual population growth in the City of Fremantle grew by 1.19 per cent, which exceeded the annual population growth in the City of Perth (0.8 per cent), and other major inner-city LGAs all of which recorded a decline in their estimated resident population (City of Subiaco by -1.4 per cent, City of Vincent by -0.7 per cent, the Town of Victoria Park by -0.6 per cent) and City of Joondalup by -0.1 per cent).

An increase in the resident population (and density) of the Fremantle city centre will help to develop critical mass during the week, and minimise the risks associated for local businesses with a transition to a “weekend economy” which is overly reliant on visitors from across the Perth Metropolitan Area, as well as domestic and international tourists. A critical element to increasing the resident population in the Fremantle city centre is ensuring quality core services are available and in close proximity for local residents.

Figure 3.8 compares the age demographics of the City of Fremantle to Western Australia. The share of the population in the 50-59, 60-69, 70-79 and 80 years and over age brackets for the City of Fremantle exceeds the share for Western Australia by in excess of 1 per cent. This data indicates the population of the City of Fremantle is characterised by an older age demographic of residents, relative to the overall age composition of Western Australia. This may in part be the result of the higher median house prices in Fremantle and surrounding suburbs, relative to the Perth Metropolitan Region, which limits the entry of first home buyers and young families to the area (see Section 3.2.1).

Figure 3.8 City of Fremantle – Age Demographics compared to Western Australia



Source: ABS – Census (2016)

Key Finding 7 Population

Since 2006-07, the population of the City of Fremantle has grown at a slower rate relative to other major inner-city LGAs in the Perth Metropolitan Area such as the City of Perth, Town of Victoria Park and City of Vincent. In a positive signal for strong population growth in the short to medium term, the City of Fremantle recorded an annual population growth rate of 1.19 per cent in 2020-21, which exceeded the City of Perth and the negative growth rate recorded by other major inner-city LGAs over the same period.

An increase in the resident population (and density) of the Fremantle city centre will help to develop critical mass during the week, and minimise the risks associated for local businesses with a transition to a “weekend economy” which is overly reliant on visitors from across the Perth Metropolitan Area, as well as domestic and international tourists.



Economic Contribution of the University of Notre Dame

4

This section of the report presents the methodology, key data inputs, and results of ACIL Allen's modelling of the economic contribution of the University of Notre Dame to the City of Fremantle and broader Western Australian economy. Results are presented in terms of the direct and indirect contribution to economic output, incomes earned and full time equivalent job creation in the City of Fremantle and the WA economy more broadly.

4.1 Methodology

ACIL Allen has used its in house Input Output (IO) modelling framework for the purposes of estimating the economic contribution of the University of Notre Dame to the City of Fremantle and the WA economy for the 2020 calendar year (CY20) based on the financial information provided by the University.

4.1.1 Modelling framework

The CY20 economic contribution of the University of Notre Dame is examined using ACIL Allen's Input-Output (IO) modelling framework, with results produced in the form of the direct and indirect contribution of the sector to the Western Australian economy in terms of the contribution to:

- economic output (Gross State Product);
- income (wages and salaries earned);
- employment (Full Time Equivalent (FTE) jobs); and

Further information on ACIL Allen's Input Output (IO) modelling framework is provided in **Appendix A**.

An economic contribution study takes the financial and employment data of the University for the CY20 to determine the overall size and scope or "footprint" on the economy. The economic contribution is calculated on the basis of the University's direct activities (such as surpluses generated and wages paid to staff) and indirect activities (such as flow on impacts from payments made to suppliers and goods and services purchased by employees) to determine the full extent of the flow-on economic contribution.

4.1.2 Data inputs

The input data used for the economic contribution modelling in this report was sourced from the University's financial reporting team.

ACIL Allen developed a data request specifying financial information required for the study, which was completed by the finance team for CY18,19 and 20 and then validated by ACIL Allen.

ACIL Allen has aggregated all results across the data categories presented in **Table 4.1**.

Table 4.1 Key Data Inputs

Data Category	Description	Why it's needed?
Operational Revenue	Actual revenue earned and itemised to a level determined by the University	Input used in calculating Gross Product.
Operational Expenditure	Actual operating expenditure itemised to a level determined by the University.	Breakdown of operating expenditure is coded to individual industries and share of local production to understand how the economic activity flows through the economy over the study period.
Capital Expenditure	Actual capital expenditure itemised to a level determined by the University.	Breakdown of capital expenditure is coded to individual industries and share of local production to understand how the economic activity flows through the economy over the study period.
Operational Employment	Actual FTE numbers for key employment categories itemised to a level determined by the University.	Provides estimates of the operating workforce directly employed by providers in the sector by occupation classification. The contribution of indirect employment from activities of the University are estimated using ACIL Allen's IO modelling framework.

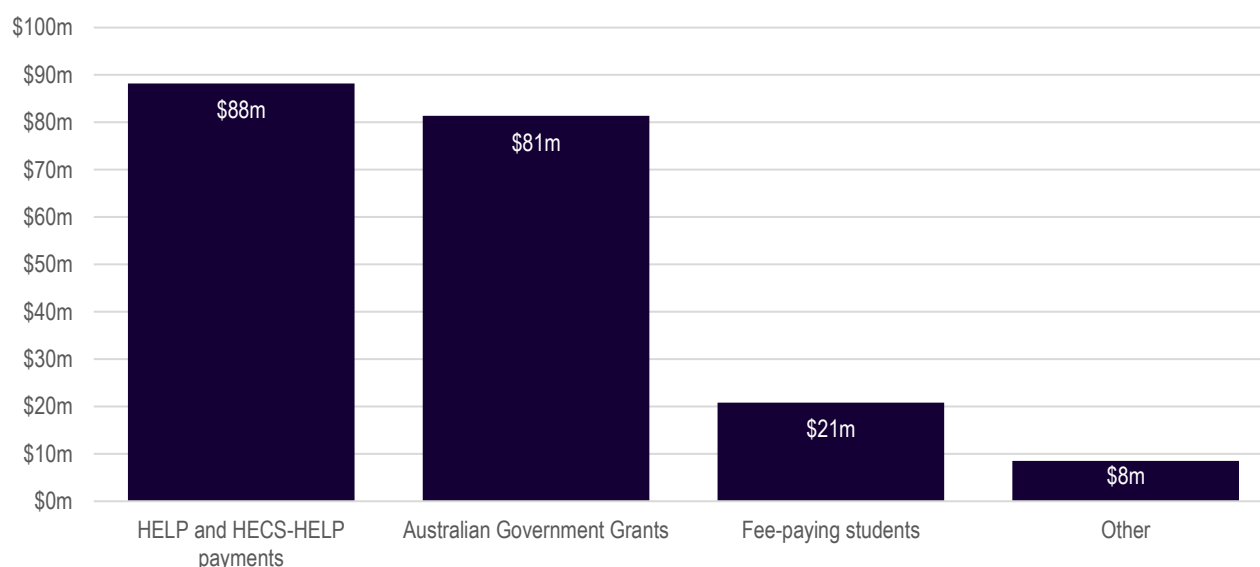
Source: ACIL Allen

4.2 Financial profile

4.2.1 Operational revenue

The national operations of the University of Notre Dame generated operational revenues of \$198.9 million in 2020. This represents a 5% growth in total revenue compared to 2019 (\$189.9 million).

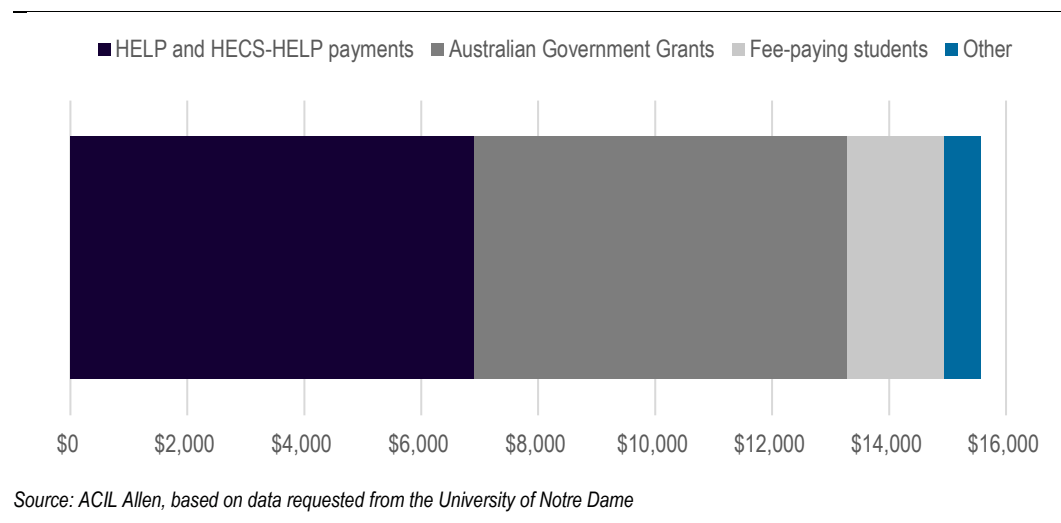
The University generated 44% of its revenue (\$88.2 million) via HELP (Higher Education Loan Program) and HECS (Higher Education Contribution Scheme)-HELP payments from domestic students. A further \$81.3 million (41%) was generated via Australian Government Grants. Direct fee paying students accounted for 10%, or \$20.8 million of total revenue, and a further 4%, or \$8.5 million, came from other sources, including philanthropic income and non-government grants.

Figure 4.1 Operational Revenue, by category, \$m

Source: ACIL Allen, based on data requested from the University of Notre Dame

ACIL Allen estimates that the university generated \$15,560 in revenue for each student enrolled across each of its campuses nationally in 2020, which equates to \$118.5 million of revenue from each of the 7,618 students enrolled at the Fremantle campus.

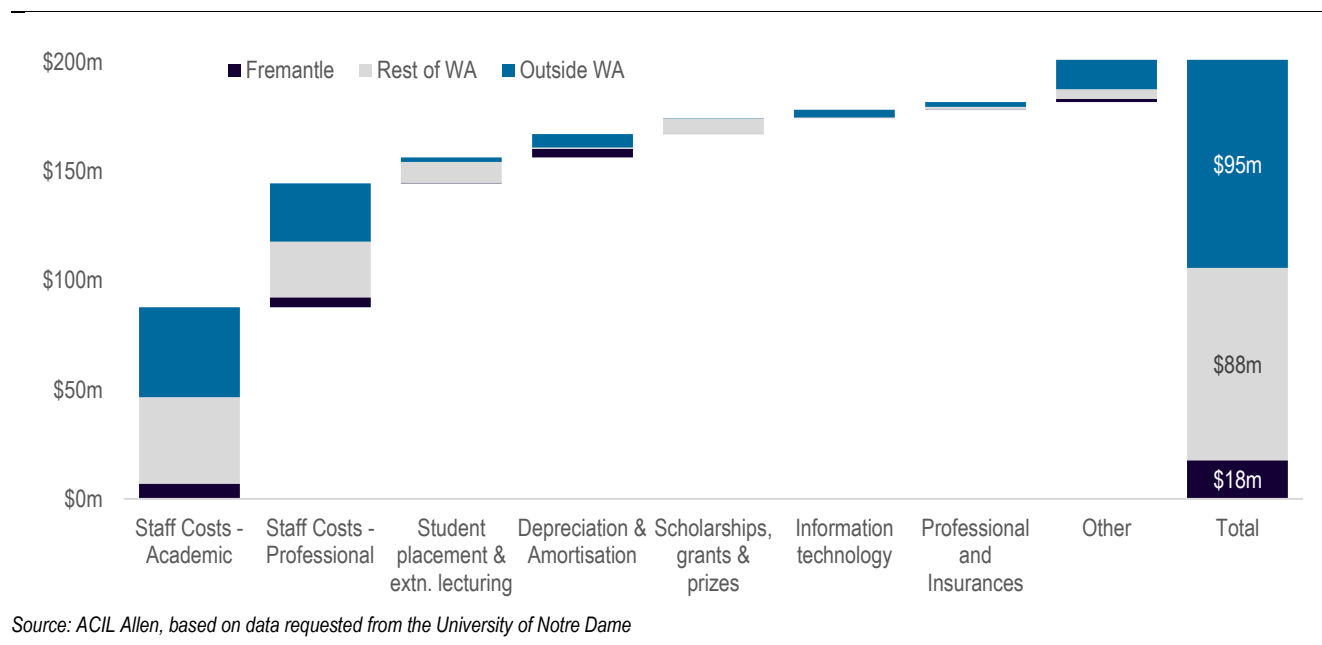
Figure 4.2 Revenue per student, by source of revenue



4.2.2 Operational expenditure

The national operations of the University of Notre Dame generated operational expenses of \$200.9 million in 2020. This represents a 5% growth in total expenditure compared to 2019 (\$191.3 million).

Figure 4.3 Operational Expenditure, by category and source of supply, \$m



Just under one in every ten dollars (9%) was spent on goods and services sourced directly from the City of Fremantle, equating to \$17.7 million in 2020. An additional \$88.0 million was spent on goods and services sourced from outside the City of Fremantle, but within WA, comprising 44% of the total spend in 2020. The remaining \$95.2 million was sourced from outside WA (interstate and overseas), accounting for 47% of the total national expenditure. Within the City of Fremantle, the

highest level of expenditure in the was on Academic Staff (\$7.0 million) and Professional Staff (\$4.5 million).

Depreciation and amortisation costs amounted to \$3.9 million on capital items sourced from the City of Fremantle, and accounted for 38% of the University's total national depreciation and amortisation costs.

ACIL Allen estimates that for each of the 7,618 students enrolled at the Fremantle campus, the University directly spent \$2,323 on goods and services sourced from the City of Fremantle and a further \$11,547 on goods and services sourced outside the City of Fremantle but still within WA.

4.2.3 Capital expenditure

The University of Notre Dame incurred \$6.2 million in capital expenditure in 2020. This expenditure was primarily on building projects (\$4.4 million).

The remaining capital expenditure was on plant and equipment (\$0.8 million), IT projects (\$0.5 million) and library (\$0.4 million).

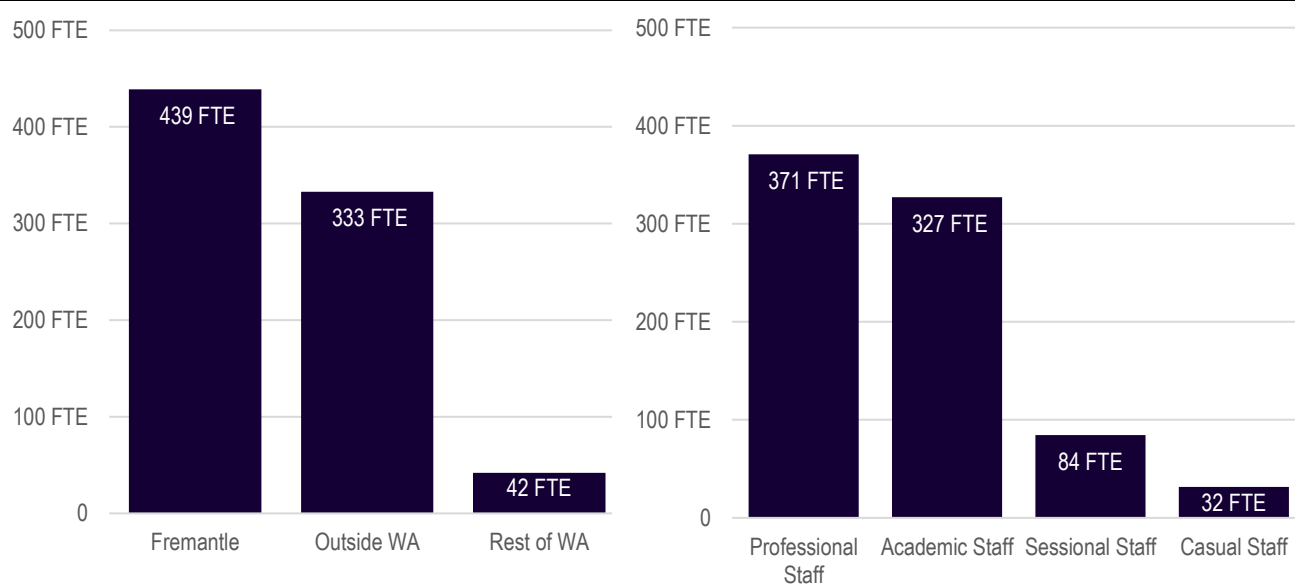
4.2.4 Operational employment

In 2020, the University of Notre Dame employed 814 FTE staff across three campuses (Fremantle, Sydney and Broome).

The majority of staff were predominantly employed as professional staff (371 FTE, 46%), followed by academic staff (327 FTE, 40%), sessional staff (85 FTE, 10%) and casual staff (32 FTE, 4%).

The Fremantle campus employed 439 FTE staff or 54% of the university's total staff, followed by the Sydney campus (333 FTE, 41%) and the Broome campus (42 FTE, 5%).

Figure 4.4 FTE Staff, by location and role



Source: ACIL Allen, based on data requested from the University of Notre Dame

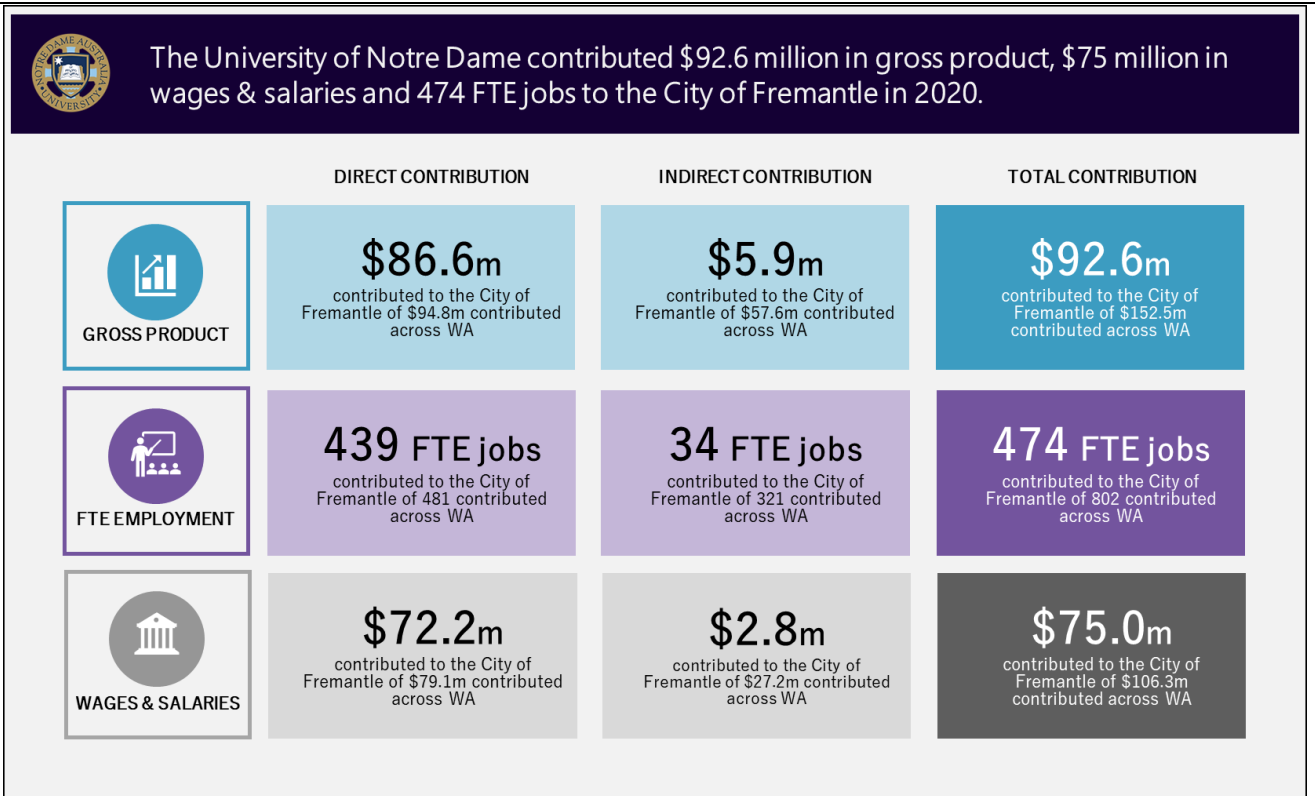
4.3 Economic contribution results

This section presents the result of the economic contribution modelling on the activities of the University of Notre Dame.

The results are presented in terms of the University’s contribution to gross product, FTE employment and wages and salaries earned. The results are also reported according to the direct contribution – resulting from the University’s direct activities – and indirect contribution – resulting from the activities of those providing goods and services purchased by the university and its staff. The results are also presented at both the City of Fremantle level and across the entirety of Western Australia.

Summary results of the economic contribution modelling are presented in **Figure 4.5**.

Figure 4.5 Economic Contribution of the University of Notre Dame – Summary Results



Source: ACIL Allen

Overall, the University of Notre Dame generates the majority of its direct economic contribution within the City of Fremantle, with the indirect contribution primarily occurring in other areas of Western Australia.

4.3.1 Gross product



In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to Gross Product of \$152.5 million in Western Australia, of which \$92.6 million (61%) was generated within the City of Fremantle.**

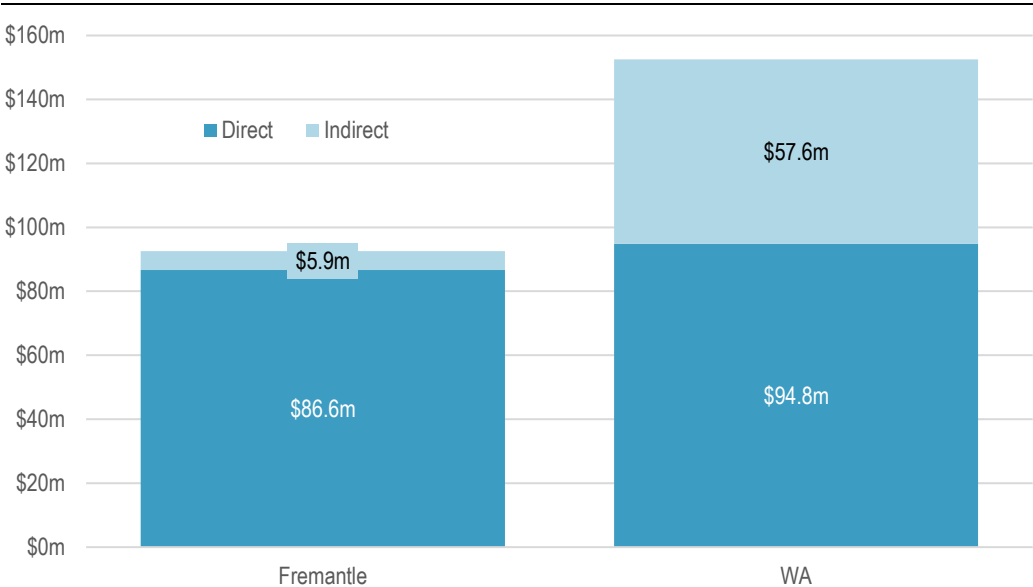
In terms of the direct Gross Product contribution, which combines the value of salaries and wages and surpluses generated on production, ACIL Allen estimates that \$86.6 million was generated within the City of Fremantle in 2020, which equates to 98% of the direct gross product contribution in Western Australia. Highlighting the importance of the University to the City, **ACIL Allen**

estimates that the University of Notre Dame accounted for 36% of the total economic value from the Education and Training Sector in the City of Fremantle in 2020.

In terms of the indirect Gross Product contribution, which combines the value of production related to good and service purchased by the University and its staff, ACIL Allen estimates that a further \$5.9 million was generated within the City of Fremantle, which equates to 10% of the \$57.6 million indirect Gross Product contribution in Western Australia.

Based on the economic contribution modelling, **ACIL Allen estimates that \$12,150 was generated in total gross production within the City of Fremantle for each student enrolled at the Fremantle campus in 2020.**

Figure 4.6 University of Notre Dame - Contribution to Gross Product, \$m 2020



Source: ACIL Allen, based on data requested from the University of Notre Dame

Key Finding 6 Economic Contribution Results – Gross Product

In 2020, the University of Notre Dame generated a combined contribution to gross product of \$152.5 million in Western Australia, of which \$92.6 million (61%) was generated within the City of Fremantle. The direct contribution of the University of Notre Dame accounts for 36% of the \$240.6 million contributed by the entire Education and Training sector in the City of Fremantle in 2020.

4.3.2 FTE employment



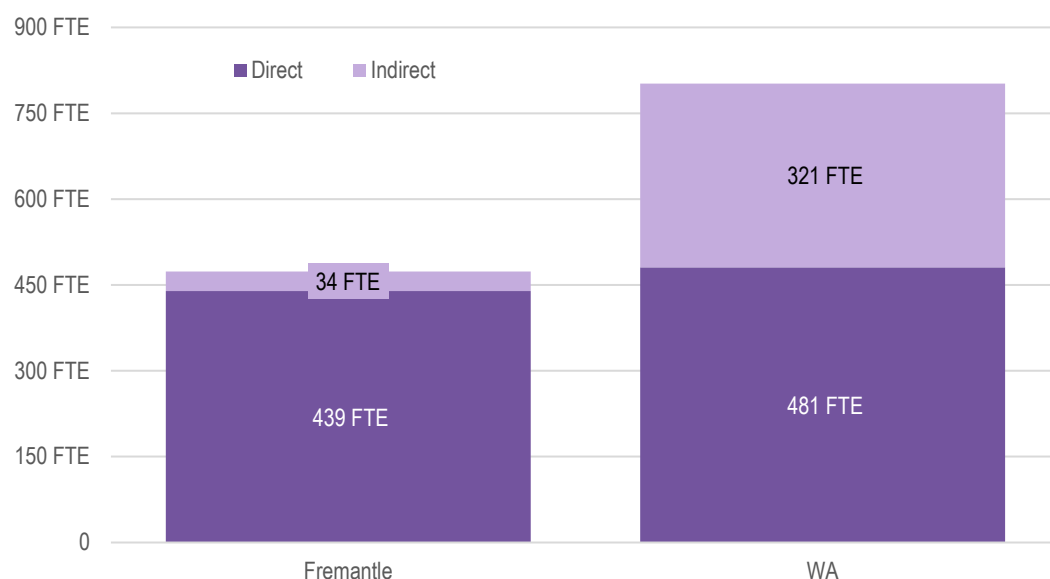
In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to employment of 802 FTE in Western Australia, of which 474 FTE jobs (59%) were generated within the City of Fremantle.**

In terms of the direct employment contribution, which is a measure of those directly employed by the University, ACIL Allen estimated that 439 FTE were directly employed within the City of Fremantle, which equates to 91% of the direct employment contribution in Western Australia.

In terms of the indirect employment contribution, which combines the jobs generated from the production of goods and service purchased by the University and its staff, 34 FTE jobs were generated within the City of Fremantle, which equates to 11% of the 321 indirect FTE jobs contributed across Western Australia.

ACIL Allen estimates that **1 FTE job was generated in the City of Fremantle for every 16 students enrolled at the Fremantle campus.**

Figure 4.7 University of Notre Dame - Contribution to Employment, FTE 2020



Source: ACIL Allen, based on data requested from the University of Notre Dame

Key Finding 7 Economic Contribution Results – Employment

In 2020, the University of Notre Dame generated a combined contribution to employment of 802 FTE in Western Australia, of which 474 FTE (59%) were generated within the City of Fremantle.

ACIL Allen estimates that 1 FTE job was generated in the City of Fremantle for every 16 students enrolled at the Fremantle campus.

4.3.3 Wages and salaries

In 2020, ACIL Allen estimated the **University of Notre Dame generated a combined contribution to wages and salaries of \$106.3 million in Western Australia, of which \$75.0 million (70%) was generated within the City of Fremantle.**

In terms of the direct wages and salaries contribution, which is a measure of the wages and salaries paid to those employed by the University, **\$72.2 million was generated within the City of Fremantle, which equates to 91% of the \$79.1 million direct wage and salary contribution in Western Australia.**

In terms of the indirect wages and salaries contribution, which combines the incomes generated from the production of goods and service purchased by the University and its staff, \$2.8 million was generated within the City of Fremantle, which equates to 10% of the \$27.2 million indirect wage and salary contribution across Western Australia.

ACIL Allen estimates that for **every student enrolled at the Fremantle campus, \$9,848 in direct and indirect wages and salaries was earned within the City of Fremantle.**



Figure 4.8 University of Notre Dame - Contribution to Salaries and Wages, \$m 2020



Source: ACIL Allen, based on data requested from the University of Notre Dame

Key Finding 8 Economic Contribution Results – Salaries and Wages

In 2020, the University of Notre Dame generated a combined contribution to salaries and wages of \$106.3 million in Western Australia, of which \$75 million (70%) was generated within the City of Fremantle.

ACIL Allen estimates that for every student enrolled at the Fremantle campus, \$9,848 in direct and indirect salaries and wages was earned within the City of Fremantle.



Social Contribution of The University of Notre Dame

5

This section presents a social contribution of The University of Notre Dame which considers all the channels through which the University makes a positive contribution to the local community of Fremantle and Western Australia.

5.1 Frame of reference

The Frame of Reference establishes a position from which contributions can be conceptualised and attributed to the University of Notre Dame's Fremantle campus. For this study, ACIL Allen considered all the channels through which the University makes a positive contribution to the local community of Fremantle and Western Australia.

There are a broad range of contributions which have been defined by two broad key categories:

- **Geography of contribution** – those contributions that can be isolated to within the City of Fremantle and those that both occur within the city and extend outside the City.
- **Measurements of contribution** – contributions that can be expressed quantitatively and those expressed qualitatively, based on methodological and data availability constraints

These benefits are described below.

5.2 Methodology and approach

ACIL Allen worked collaboratively with the University of Notre Dame to identify the types of social contributions the Fremantle campus generates, and to also collect and analyse data and information to assess each contribution.

5.2.1 Workshop

ACIL Allen conducted a two-hour workshop with internal stakeholders from the University of Notre Dame on Friday 25 February 2022. The objective of the workshop was to identify social benefits that can be attributed to the University and data and information available to measure the value of these benefits.

At the workshop, ACIL Allen presented a preliminary benefits framework comprised of 15 social benefits. ACIL Allen tested the preliminary benefits framework with attendees at the workshop to confirm they were accurate and to determine the extent to which data would be available for the study.

Following a discussion on the preliminary benefits framework, attendees broke into small groups to brainstorm any additional social benefits attributable to the University of Notre Dame.

Following the workshop, ACIL Allen reviewed the outcome and followed up with relevant attendees to collect data identified to support the measurement of social benefits.

5.2.2 Data collection

ACIL Allen worked with the University to collect data to support the social contribution analysis. Following the workshop, the University contacted relevant staff from each of the schools and departments to request the data and information specified by ACIL Allen.

5.2.3 Research and analysis

To support the estimation of the contributions, ACIL Allen undertook additional empirical research to support both the development of assumptions for quantitative contributions and also evidence to support the description of qualitative contributions. ACIL Allen was conservative in developing assumptions for the quantitative contributions, in an effort not to overstate the potential value of these contributions.

5.3 Social contribution findings

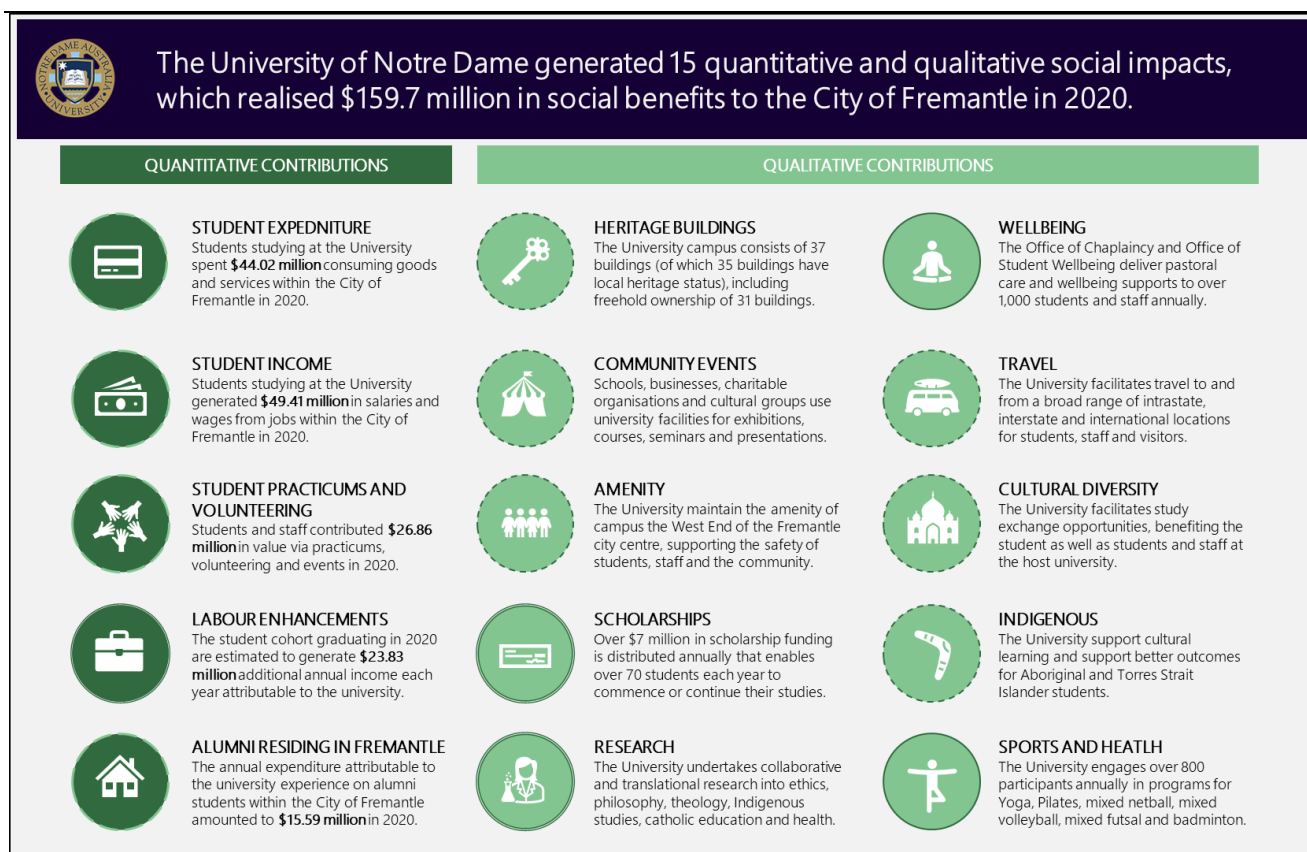
To quantify the social contribution of The University of Notre Dame, ACIL Allen considered all the channels through which the University makes a positive contribution to the local community of Fremantle and Western Australia.

Through its own research and analysis, and through collaboration with key stakeholders in the University of Notre Dame, ACIL Allen determined there were 15 types of social contributions which were grouped into the following four categories:

- **Social and Cultural benefits:** these benefits were *qualitatively assessed* for the purposes of this study, and include (1) the degree to which the University improves the level of amenity in the City of Fremantle; (2) the events and programs that support better outcomes for Aboriginal and Torres Strait Islander students; (3) its maintenance of heritage buildings in the City; (4) its support for travel to intrastate, interstate and international locations for students, staff and visitors; (5) in promoting cultural diversity through exchange opportunities; and (6) in supporting community events through the Campus facilities.
- **Local business and economic benefits:** these were *quantitatively assessed* by estimating (7) student expenditure on goods and services in the City; (8) the additional salaries and wages earned by students working in the City; (9) the expenditure of Alumni residing in Fremantle; and (10) the value assigned to students and staff in the City via practicums, volunteering and events.
- **Health and wellbeing benefits:** these were *qualitatively assessed* for the purposes of this study, and include (11) the benefits from University-run sports and health activities; and (12) the pastoral care and wellbeing supports and training from the Office of Chaplaincy and Office of Student Wellbeing.
- **Skills and capacity benefits:** (13) the value of improved employment outcomes resulting from the knowledge and skills of students studying at the University each year was *quantitatively assessed* in this study, with the benefit arising from (14) scholarship funding and (15) the University's research *qualitatively assessed*.

A summary of the overall social contribution of the University of Notre Dame to the City of Fremantle, and the impact channels that support this overall contribution, is summarised in **Figure 5.1**. The remainder of this section provides a detailed summary of the social impacts for each of the 15 types of social contributions, and the assumptions that underpin the five social impacts that were quantitatively assessed.

Figure 5.1 Quantitative and qualitative social contributions made by the University of Notre Dame Fremantle Campus



Source: ACIL Allen. Note: narrow broken line = social and cultural benefits, broad broken line = business and economic benefits, solid line = health and wellbeing benefits, double line = skills and capacity benefits

Through these four impact channels, ACIL Allen estimated the **University of Notre Dame conservatively generated an additional \$159.7 million in social benefits to the City of Fremantle in 2020.**

To put this into perspective, the **social impact of the University is 73% larger than the quantified economic contribution of the University to the City of Fremantle in 2020.** This demonstrates the “hidden” contribution of the University that is not captured through more traditional economic or financial impact models.

Key Finding 9 Overall Social Contribution Results

The University of Notre Dame generates 15 types of social contributions from the Fremantle Campus, across the areas of social and cultural, business and economic, health and wellbeing and skills and capacity contribution. Contributions include those that deliver an impact directly within Fremantle and those that impact Fremantle and beyond.

ACIL Allen estimated that the University of Notre Dame conservatively generated a \$159.7 million social contribution to the City of Fremantle, which is 1.7 times larger and in addition to the quantified economic contribution. This is also in addition to the contribution beyond the City of Fremantle and qualitative contributions described in this report.

5.4 Social and cultural contributions

5.4.1 Amenity



The University of Notre Dame seeks to ensure the amenity of the Fremantle campus is maintained at all times. Various measures undertaken by the University to maintain this amenity helps to support the safety of students and staff, and by extension members of the local community in and around the West End of the Fremantle city centre, particularly in the early evening hours.

The Fremantle city centre, similar to other major urban centres across the Perth metropolitan area, is impacted by incidents of antisocial behaviour from members of the public. The Fremantle campus is located in close proximity to hotels and bars situated on Marine Terrace, Market Street and South Terrace that often attract large groups of patrons. Antisocial behaviour has a direct impact on the real and perceived sense of safety of people commuting through the Fremantle city centre, as well as an indirect impact on trade and the broader perceptions of Fremantle as a place to visit, particularly for families.

On average, over the past three years, The University of Notre Dame has spent \$443,483 on security. This equates to a total of approximately \$1.33 million in expenditure on security over the three-year period. The security service paid for by The University of Notre Dame operates in conjunction to security and community safety services delivered by the City of Fremantle. The security service paid for by The University of Notre Dame is employed to respond to incidents, maintain building security by opening and monitoring them, and provide assistance to students, staff and visitors. For example, security guards can walk students and staff to the perimeter of the campus. A further security measure is the opening of staff car parks after hours for staff and students to park their cars closer to campus.

5.4.2 Indigenous culture



The Fremantle campus is located on Whadjuk Nyungar Country. The University of Notre Dame facilitates a range of events and programs for students and staff that provide community and elder engagement opportunities, support cultural learning and assist Aboriginal and Torres Strait Islander students in their transition to university. A number of events are held across the year to acknowledge and celebrate Aboriginal culture including NAIDOC Week, Welcome To Country ceremonies and “on Country” cultural field trips. In addition, Cultural Awareness Training Workshops for staff take place at the Fremantle campus over four times a year.

Aboriginal and Torres Strait Islander students at the Fremantle campus have access to a range of pastoral care and academic support program such as Indigenous Student Support Officers, mentoring programs (including the Australian Indigenous Mentoring Experience), study skills workshops and the Indigenous Student Success Program (ISSP). The Manjaree Aboriginal Student Place is a meeting place for Aboriginal and Torres Strait Islander students and is used for student cultural and educational gatherings, study and recreation.

A number of scholarships are available to Aboriginal and Torres Strait Islander students, particularly in health, such as the Beasley Family Scholarship and the Aboriginal Health Pathways Scholarship. The University of Notre Dame also support Fremantle Clontarf through a \$10,000 sponsorship.

The Nulungu Research Institute is based at the Broome campus and was established in 2008. The core research themes for the Nulungu Research Institute are Culture Country Language, Education and Learning, Aboriginal Wellbeing and Health, and Cultural Security and Social Justice. The Nulungu Research Institute provides an Indigenous research and academic focus for the entire University, including the Fremantle campus, and fosters collaboration with government, national and international academic institutions, teaching and research communities and industry. A recent

project from a research team at the Nulungu Research Institute, undertaken between September 2020 and January 2022, sought to document the impacts of COVID-19 restrictions and other government measures on Aboriginal people in the Kimberley, and how Aboriginal communities and organisations responded to these measures.

The University of Notre Dame was a key partner, with the City of Fremantle and the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS) in a co-design project with Whadjuk Nyungar elders and leaders. The 'Mapping Boodjar: Walyalup Fremantle Cross-Cultural Mapping' project aims to map Boodjar documents and visualise Whadjuk Nyungar and non-Aboriginal knowledge and language across the Fremantle area in Western Australia, within an urban landscape.

5.4.3 Heritage buildings



The University of Notre Dame played a critical role in a gentrification phase during the early 1990s that renewed the West End of Fremantle and restored many of the heritage buildings. Prior to this point, aside from landmark buildings, a large proportion of heritage restoration work had focussed on individual houses and not on commercial buildings within the West End, previously used as warehouses, banks and pubs. Prior to their acquisition from The University of Notre Dame, many of the buildings in the West End were decrepit and not designed or configured for the purposes of an education institution.

The 37 buildings that as a collective make up the Fremantle campus account for a total usable floor area of 28,497 sqm. The University of Notre Dame is the freehold property owner of 31 buildings on the Fremantle campus. Of the remaining buildings, the Roman Catholic Archbishop of Perth is freehold property owner of four buildings, while there are two buildings owned by the City of Fremantle that are used by The University of Notre Dame under a leasehold agreement. There are a total of 35 buildings used by The University of Notre Dame that have local heritage status, including three buildings that have also been assigned state heritage status.

Heritage restoration in the West End of Fremantle has benefited from continuity of quality in architectural style provided by the University of Notre Dame, underpinned by consistency in features such as colours and patterns. The ongoing heritage restoration works undertaken by The University of Notre Dame has helped to create modern, functional and flexible education buildings that both adapt to and respect the heritage precinct in which they operate. The curation of heritage sites in the West End by The University of Notre Dame is consistent with the principles of the Burra Charter. The Burra Charter is a document published by the Australia International Council on Monuments and Sites (ICOMOS) which defines the basic principles and procedures to be followed in the conservation of Australian heritage places.

Cultural heritage tourism is an important component of the broader tourism industry and is characterised by travellers who enjoy experiencing the places, artefacts and activities that authentically represent the stories and people of the past and present. Preservation of historic buildings by The University of Notre Dame helps to support cultural heritage tourism in Fremantle, along with neighbouring landmarks such as the Fremantle Prison and the Round House. Cultural heritage tourism is a unique aspect of Fremantle's attractiveness as a tourism destination, relative to other tourism destinations in Western Australia. As a comparison, many of the historic and architecturally important heritage buildings located in the Perth CBD were demolished and replaced by new office and commercial developments over the second half of the 20th century. Despite community advocacy efforts in more recent years being successful in retaining heritage buildings, cultural heritage tourism in the Perth CBD has been damaged by the loss of historic and architecturally significant buildings such as Colonial Mutual Life Building, AMP Chambers, Viking House and Empire Building.

In 2006, the Productivity Commission identified Fremantle as an example of where heritage restoration had positively impacted on tourism along with other destinations such as Tasmania's historic towns and convict sites, The Rocks in Sydney and Victoria's central goldfields.³

5.4.4 Travel



While travel has been impacted over the past two years by the COVID-19 pandemic, it represents an important component of the learning experience for students and the professional development of staff.

One measure of travel activity is the number of staff and guests brought to the Fremantle campus by The University of Notre Dame. In 2021, there were 126 trips involving staff and guests being brought to the Fremantle campus by the University. This was an increase on the 85 trips recorded in the year prior, but less than half the number trips (280) recorded in pre-COVID travel conditions in 2019.

Travel, in the form of field trips/immersions and external placements, is a key component of the curriculum for students at the School of Medicine (**Table 5.1**).

Table 5.1 School of Medicine – Travel Programs

Year	Program Description
1 st	Visit to either Bindjareb and Mandjoogoordap (Pinjarra and Mandurah) or Dyoondalup and Yagan Mira (Point Walter and Wireless Hill), each as a day trip, for learning on Country
1 st	Wheatbelt Community Engagement Week – students spend four days billeted in a Wheatbelt town
2 nd	36 students participate in Broome Learning on Country (BLOC) and are based for six weeks on the Broome campus (two cohorts of 18 students)
2 nd	All students participate in a one week Broome Immersion, cultural learning in Broome (~15-20 students) and Kimberley Placement (85-90 students)
3 rd	25-30 students spend whole year at one of 15 Rural Clinical School of WA (RCSWA) sites.
4 th	Between 4-8 students complete almost all of the year in a rural centre (pilot with RCSWA)
4 th	Approximately 90% of students complete a rural GP terms (across WA) of four weeks
4 th	Students complete an elective (self-funded) clinical placement – can be local / interstate / international (suspended with COVID-19 last few years).

Source: School of Medicine

5.4.5 Cultural diversity



The University of Notre Dame exemplifies cultural diversity through the student and staff base at the Fremantle campus.

Students who immerse themselves in a new culture by undertaking study overseas benefit from increases in employability by developing transferable skills (such as awareness and sensitivity). In addition, employers irrespective of profession or industry, value staff who have the ability to work with people and organisations from different cultures.

Domestic students at The University of Notre Dame have the opportunity to apply to study a semester of their degree at a range of destinations across the world at one of the University's partner universities in Europe, United Kingdom, USA, Canada, Japan, Korea, Indonesia and Taiwan.

³ Productivity Commission 2006, *Conservation of Australia's Historic Heritage Places*, Report No. 37.

In Semester One 2022, The University of Notre Dame had a total of 47 enrolled full degree international students at the Fremantle campus. While the source country for nine of these students was 'unknown', the top three largest source markets were Bhutan (5 students), India (5 students) and Nepal (4 students). At a regional level, Asia accounts for the largest share of enrolled full degree students at approximately 47 per cent, followed by Africa at 26 per cent. A larger program for international students for The University of Notre Dame is the Study Abroad Program. Through the Study Abroad Program, students enrolled at partner universities can apply to study a semester of their degree at the Fremantle campus (inbound Study Abroad). Over the period from 2018 to 2022, a total of 221 inbound international students have been engaged in the Study Abroad Program. Approximately 88 per cent of the inbound students over this period have been from the United States.

5.4.6 Community events



A wide spectrum of community groups use facilities at The University of Notre Dame to host events such as courses, seminars, presentations and exhibitions. The range of community groups using the facilities include schools, businesses, charitable organisations and cultural groups. The facilities at The University of Notre Dame available for hire include selected lecture theatres, halls, classrooms and courtyards. The hire fee for the use of facilities by community groups is often waived.

The frequency and scale of community events have declined over the past two years due to social gathering restrictions imposed as a result of the COVID-19 pandemic. While many of the community groups hosting events at The University of Notre Dame are based within the Fremantle area, there are also groups such as businesses and schools, that come into the Fremantle campus for events from across the Perth metropolitan area and regional Western Australia. The University of Notre Dame also hosts presentations and lecture series at the Fremantle campus that are open to the local community.

The University of Notre Dame has also supported local community events through sponsorships. For example, the University was the Principal Sponsor for the Fremantle Health & Wellness Festival in February 2022 hosted by the Fremantle Chamber of Commerce. In 2022, The University of Notre Dame partnered with the Fremantle Chamber of Commerce to launch a new student discount card which provides generous savings on a wide range of products and services for students and has been backed by more than 40 outlets in Fremantle, including hotels, cafes, restaurants, retail stores, tour operators and health and wellbeing service providers.

The Holy Spirit Chapel is available for weddings (for couples eligible to marry in the Catholic Church) or other Catholic Sacramental Celebrations, in addition to selected courtyards and halls.

5.5 Local business and economic contributions

5.5.1 Student expenditure



Students studying at the University generate economic activity within the City of Fremantle through the consumption of a range of goods and services. This activity represents an important contribution to the City of Fremantle, supporting a range of businesses and employees across the City.

Assumptions

ACIL Allen analysed data on students enrolled at the Fremantle Campus, which found that in 2020, 990 students resided within the City of Fremantle, and a further 6,618 resided outside Fremantle, but travelled to the campus to undertake study.

To determine the consumption pattern of the student cohort, ACIL Allen relied on a report from Universities Australia⁴, which presented the results of a comprehensive survey on the average expenditure profile of students studying at university. The report found that in 2015, students spend an average of \$560 per week on living expense including rent, food, public transport, utilities and other items. ACIL Allen adjusted the survey results (which related to student expenditure in 2015) to account for inflation⁵ to derive estimates for 2020.

ACIL Allen also augmented the results with additional publicly available research⁶ to estimate the portion of students living with parents (25%), and therefore not incurring any rental costs. It was assumed all students would incur the other categories of costs.

ACIL Allen then developed a best-estimate for the portion of expenditure that occurred within the City of Fremantle. These assumptions are presented in **Table 5.2**.

Table 5.2 Student Expenditure – modelling assumptions

	Expenditure (2015) ⁴	Expenditure (2020) ⁶	Student expenditure within Fremantle	
			Residing in Fremantle	Residing out of Fremantle
Rent	\$200	\$215.64	100%	0%
Food	\$175	\$188.69	80%	20%
Public transport and utilities	\$85	\$91.65	10%	10%
Other spending	\$100	\$107.82	70%	20%
Total	\$560	\$603.79		

Source: ACIL Allen

Key Finding 10 Student Expenditure

Based on the above assumptions, it was estimated students at the Fremantle Campus generated \$44.02 million in expenditure within the City of Fremantle in 2020.

This estimate is based on each student residing within the city spending \$20,600, and each student residing outside the city spending \$3,560.

5.5.2 Student income



Students studying at the Fremantle campus contribute to the City of Fremantle through the jobs they hold within the City. Students are employed in a range of jobs across a range of sectors, primarily on a part-time basis, producing goods and providing services for consumers within the City. These jobs make an important economic and social contribution to the City and support the prosperity and vibrancy of the City of Fremantle.

⁴ Universities Australia (2017) 2017 University Australia Student Finances Survey. Available from: <https://www.universitiesaustralia.edu.au/wp-content/uploads/2019/06/180713-2017-UA-Student-Finance-Survey-Report.pdf>

⁵ <https://www.rba.gov.au/calculator/annualDecimal.html>

⁶ Pokorny, H., Holley, D. & Kane, S. Commuting, transitions and belonging: the experiences of students living at home in their first year at university. High Educ 74, 543–558 (2017). <https://doi.org/10.1007/s10734-016-0063-3>

Assumptions

ACIL Allen sourced research undertaken by Universities Australia⁷, as introduced above, to develop estimates for the proportion of students in paid employment and average number of hours worked each week. Applying the findings from this research, and applying this to the students studying at the Fremantle campus, ACIL Allen estimated that 819 students living in the City of Fremantle were employed and 5,473 residing outside the city were employed.

Furthermore, applying this research to the student cohort at the Fremantle campus, ACIL Allen estimated that the average student with a job worked for 21.4 hours each week.

While data was not available on work locations for students at the university, ACIL Allen analysed ABS census data⁸ and found that the median home to work travel distance for people living within the City of Fremantle was 11.2 km. However, this distance fell for younger people in WA (a more representative estimate for the university student cohort) with a median of 6.13km for people 15-19 and 11.0km for people 20-29. As context, the City of Fremantle footprint expands over 19km². It was assumed students would seek out jobs that accommodated their study schedule and therefore proximity to home and university would be important. Given these findings, ACIL Allen assumed the proportion of students working within and outside the City equated to:

- 80% of students employed and living within the City had jobs with businesses within the City. This assumption is based on the expectation that the vast majority of students residing and studying within the City will also seek a job within the City.
- 20% of students employed and living outside the City had jobs with businesses within the City. This assumption is based on the expectation that a portion of students residing outside of Fremantle will seek jobs within the City to perform around their university schedule. It was assumed all other employed students had jobs outside of the City of Fremantle.

ACIL Allen used the average hourly wage⁹ for an entry level hospitality worker (\$27.45) to develop an estimate of the earnings of the students.

In total, it was assumed that on average, students who had a job generated an annual salary of \$23,354.

Key Finding 11 Student Income

Based on the above assumptions, it was estimated students at the Fremantle Campus generated \$49.41 million in salaries and wages within the City of Fremantle in 2020. This estimate equates to students undertaking 978 FTE jobs within the city.

5.5.3 University alumni residing within the City of Fremantle



The University of Notre Dame maintains records on the number of student alumni residing within the City of Fremantle post their studies.

The choice of where to live is influenced by many factors, including but not limited to proximity to family, proximity to friends, employment opportunities, local facilities, local entertainment and affordability. Another factor, and the basis for this contribution, is that where a person went to

⁷ Universities Australia (2017) 2017 University Australia Student Finances Survey. Available from: <https://www.universitiesaustralia.edu.au/wp-content/uploads/2019/06/180713-2017-UA-Student-Finance-Survey-Report.pdf>

⁸ <https://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/2071.0.55.0012016?OpenDocument>

⁹

<https://au.talent.com/salary?job=hospitality#:~:text=The%20average%20hospitality%20salary%20in,up%20to%20%24103%2C311%20per%20year.>

university can influence their choice of residential location, given the familiarity and positive association they may have for the area.

This contribution is an estimate of the value that University of Notre Dame alumni make to the City of Fremantle.

Assumptions

The University of Notre Dame provided ACIL Allen with data on the number of graduates residing within the City, their occupation and average salary for their given occupation.

This data indicated that in 2020, there were 1,685 university alumni residing within the City, working in 10 occupational fields, including business, education, law, medicine, nursing, research, arts and science, physiotherapy, health science and philosophy.

ACIL Allen elected to measure the contribution of the graduate alumni based on their consumption spending within the City. While many of the alumni may also work within the City and therefore also generate value through their jobs, it was deemed conservative and appropriate to only measure the contribution of their consumption spending.

ACIL Allen utilised data from the ABS¹⁰ to build a profile of consumption according to the income ranges of the graduate alumni. In general, and as reflected in this analysis, higher levels of income result in a lower marginal propensity to undertake consumption spending, with people directing income towards savings and investment as incomes rise.

ACIL Allen relied on estimates developed in section 5.4.1 to determine the proportion of consumption spending that occurred within Fremantle, with an estimated 72% of all consumption spending occurring within the City.

ACIL Allen acknowledged that for the alumni, having studied at the University of Notre Dame will only have been one of many factors influencing their decision to reside in the City Fremantle. While there was no strong empirical basis to determine how important this factor was, ACIL Allen deemed it conservative to attribute 1/7 or roughly 15% of this decision to the location of the university, based on the factors outlined above (i.e., proximity to family, friends, etc.) Therefore, this attribution factor (15%) was applied to the consumption spending by alumni within the City.

Key Finding 12 University alumni residing within the City of Fremantle

Based on the above assumptions, it was estimated that consumption spending within the City of Fremantle by alumni and attributable to the influence of this groups experience at university was \$15.59 million in 2020.

5.5.4 Student practicums, volunteering and events



The University of Notre Dame facilitates a range of opportunities for staff and students to contribute their skills to the community. This includes practicums and placements, where students are required to undertake supervised industry work, as well as volunteering opportunities for organisations and to support a range of events.

¹⁰ Australia Bureau of Statistics (2016) Australian National Accounts: Distribution of Household Income, Consumption and Wealth. Available from: <https://www.abs.gov.au/statistics/economy/national-accounts/australian-national-accounts-distribution-household-income-consumption-and-wealth/latest-release>

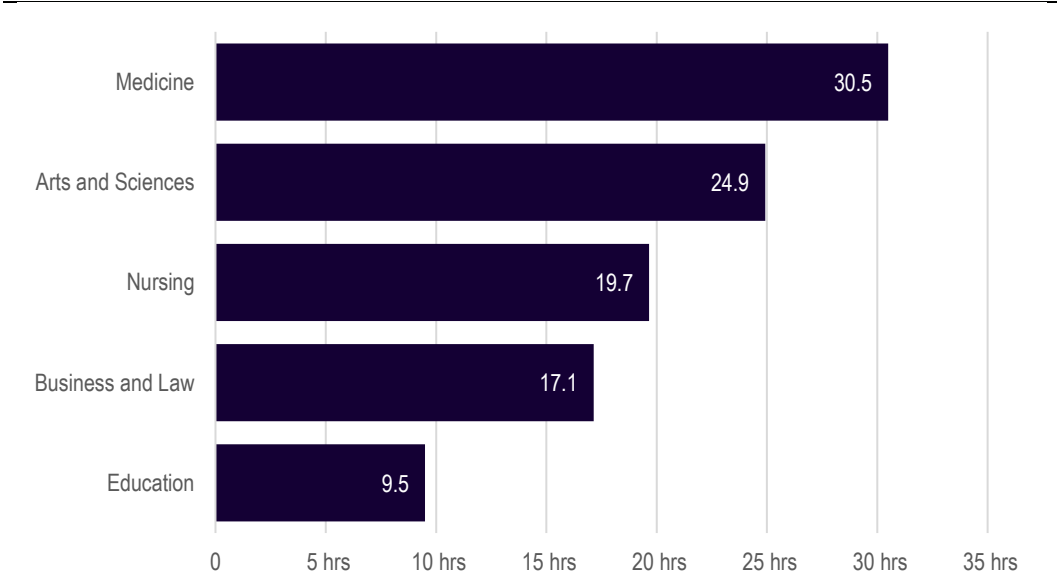
Assumptions

ACIL Allen undertook a comprehensive surveying exercise with the University of Notre Dame to understand the range of opportunities students and staff have to contribute their skills. As part of this, representatives from the University made 27 submissions outlining these contributions.

These submissions outlined the variety of opportunities students have access to, including partnering with major employers (such as tertiary hospitals and schools across the state), a range of not for profit organisations, philanthropic volunteering roles located in remote and regional areas as well as internationally, and a range of events.

Based on the submissions made by the University of Notre Dame, ACIL Allen estimated that in 2020, staff and students contributed a total of 125,860 hours to 99 informal opportunities (such as volunteering for organisations and at events) and students contributed 1,195,005 hours to formal opportunities (such as practicums and placements – see **Figure 5.2**). It should be noted that the number of events held was 40% lower in 2020 due to the social isolation measures introduced as a result of COVID-19 and so these estimates are lower than typical years.

Figure 5.2 Average Student Contribution to Practicums – hours per month



Source: ACIL Allen analysis of University of Notre Dame submissions. Note: nursing includes Nursing, Midwifery, Health Science and Physiotherapy

These contributions were valued at the WA minimum wage for FY20 (\$20 per hour) in line with the approach to valuation of non-paid activities adopted in previous studies¹¹.

¹¹ See ACIL Allen (2021): The Economic and Social Impact of the Aged Care Sector in Western Australia.

Key Finding 13 Student Practicums, volunteering and events

Based on the above assumptions, it was estimated students and staff at the Fremantle Campus contributed \$26.86 million in value via practicums, volunteering and events in 2020.

5.6 Health and wellbeing contributions**5.6.1 Sports and health**

The University of Notre Dame maintains an active schedule of social sporting events. Social sports are widely acknowledged to yield significant mental and physical health benefits.

In a typical year, the university will run programs for Yoga, Pilates, mixed netball, mixed volleyball, mixed futsal and badminton. Programs are run twice yearly (each semester) and span between 4 to 10 weeks. The university will also participate in national competitions – in 2019, 26 students travelled to the Gold Coast as part of the sports program.

COVID-19 disrupted this schedule meaning mixed futsal and badminton were not run and the university responded by starting online session for Pilates and yoga as well as some fitness classes. In 2020, 501 students and staff participated in these sporting programs, which represents a decline of 41% from the 844 participants involved in 2019.

In addition to the sport program, students undertaking their third year of the Exercise & Sport Science degree are assigned two volunteer staff members and provide goal-oriented, individualised exercise programming on campus once a week across semester. The program includes a baseline and post-training health and fitness assessments. In 2020, 90 staff and students were involved in the program, engaging for an estimated 160 hours each.

5.6.2 Wellbeing

In 2021, the Office of Student Wellbeing provided support to a total (headcount) of 978 students enrolled at the Fremantle campus. In each of the two years prior, the Office of Student Wellbeing supported in excess of 850 students, with an average across the three years of 907 students.

The support services delivered to students by the Office of Student Wellbeing is categorised into the three functions of Student Counselling Services, Respect Officers¹² and Access & Inclusion. The largest function is Access & Inclusion with 550 students accessing this service in 2021, accounting for 56 per cent of total students who received support through the Office of Student Wellbeing. Through the Student Counselling Service, counsellors and psychologists can help students with a range of issues, including anxiety, stress, depression, loss and grief, relationship difficulties, gender and sexuality concerns, financial difficulties and addictions and substance abuse.

The Office of Student Wellbeing also delivers Mental Health & Wellbeing Training to students and staff at the Fremantle campus. In 2021, a total of 1,691 students and staff engaged in Mental Health & Wellbeing Training through the Office of Student Wellbeing. This was a significant uplift on the previous two years when 288 and 472 students and staff engaged in this training in 2019 and 2020 respectively.

The Office of Chaplaincy also plays a critical role in supporting the wellbeing of students and staff at The University of Notre Dame. The Office of Chaplaincy facilitates a range of events and activities open to students, staff and community members across the year, such as Weekday Mass,

¹² The Respect Officers function includes students and staff seeking support for reasons related to sexual assault, sexual harassment and family & domestic violence.

School and Division Masses, Plunge-In, Abraham Day, study retreats, spiritual retreats and guest speakers. Large annual events such as the Good Friday Stations of the Cross and Christmas Eve Mass involve approximately 300 community members each year. Events and activities facilitated by the Office of Chaplaincy help to build a positive culture and strong sense of community among students and staff.

5.7 Skills and capacity contributions

5.7.1 Labour enhancements



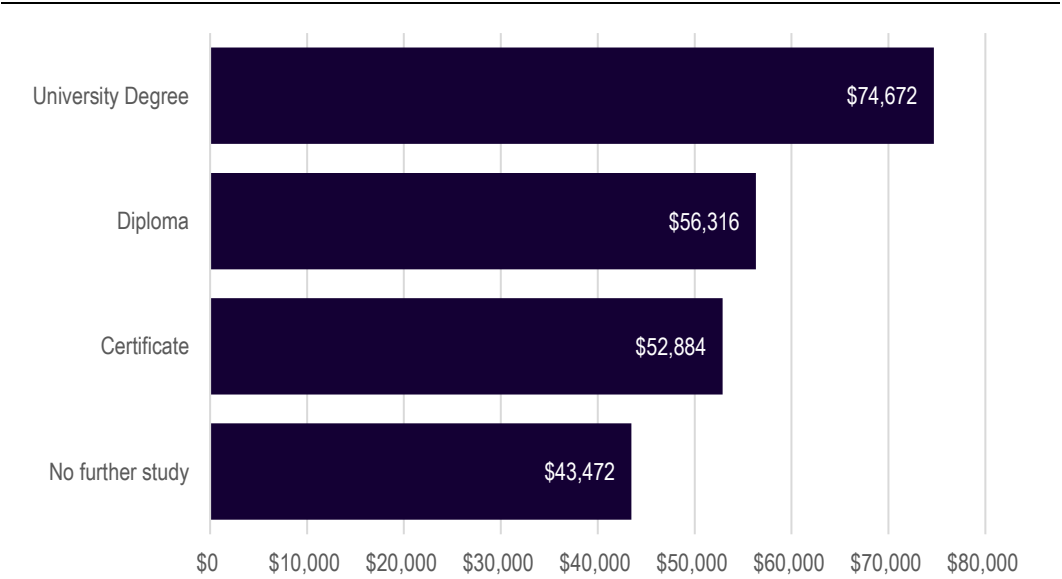
A widely recognised contribution of universities is to enhance the knowledge and skills of people. While this contribution can be a sufficient return in itself, by improving the knowledge and skills of people, universities increase the value of labour in the economy. This is realised, most observably, through higher incomes.

Assumptions

There has been significant research into the impact of undertaking study at university on the future earning potential of employees. While it may be considered self-evident that university has the potential to achieve this, isolating this impact is challenging.

ACIL Allen elected to compare income levels by educational attainment to value this contribution. To support this approach, ACIL Allen analysed Census data from the ABS¹³ related to the median annual income by four educational levels. These results are presented in **Figure 5.3**

Figure 5.3 Median annual income, by education level



Source: ABS 2016

ACIL Allen projected these incomes over a 50 year working period (i.e., 19 – 67 years inclusive) and accounted for the cost of a university degree (assumed to be \$12,500 per year). ACIL Allen compared the average annual income of a university graduate over their career to the average of those with other education levels (i.e., diploma, certificate ad no further study). This

¹³ Australia Bureau of Statistics (2016) Census data – median weekly income by education level. Available from: <https://www.abs.gov.au/websitedbs/censushome.nsf/home/2016>

comparison indicated that a university degree is associated with an average annual income \$16,665 higher than lower levels of education.

ACIL Allen applied this annual earning premium to the number of students graduating from the University of Notre Dame Fremantle campus in 2020.

Key Finding 14 Labour Enhancements

Based on the above assumptions, it was estimated that the total student cohort graduating from the Fremantle Campus in 2020 will generate an additional \$23.83 million income each year on average during their career.

5.7.2 Scholarships



For many successful recipients, scholarships are a life-changing financial contribution that enables them to commence or continue their studies, and reduce the additional stress associated with meeting daily living expenses. This impact is heightened, both in terms of financial and retention benefits, for students who qualify for a scholarship under hardship eligibility clauses.

Expenditure by The University of Notre Dame on scholarships has been captured by ACIL Allen in the input data for the economic impact assessment component of this study. On this basis, student scholarships have been categorised by ACIL Allen as a qualitative benefit. In 2020, the University allocated \$7.37 million in total expenditure to scholarships, grants and prizes. While this was a decline on the previous two years when \$8.6 million was allocated in 2019 and \$8.55 million in 2018, this reflects the changes to scholarship, grant and prize programs in response to the COVID-19 pandemic. The provision of scholarships is also supported by philanthropic funding sources. In 2021, The University of Notre Dame received \$1.9 million from philanthropic funding sources to support scholarship programs.

In 2021, The University of Notre Dame awarded a total of 70 scholarships to students at the Fremantle campus. Undergraduate scholarships cut across a range of categories including academic merit (e.g. The Vice Chancellor's Scholarship), financial and/or personal difficulties (e.g. Leonard & Ursula Keating Scholarship) and school-based scholarships (e.g. T.A.S. Scholarship). In addition to undergraduate scholarships are a range of scholarships supporting postgraduate and research students, Aboriginal and Torres Strait Islander students and international students.

Students at The University of Notre Dame are also eligible for various external and government-funded scholarship programs, such as the New Colombo Plan. The New Colombo Plan aims to lift knowledge of the Indo Pacific in Australia by supporting Australian undergraduates to study and undertake internships in the region through various scholarship and flexible mobility grant programs.

5.7.3 Research



Research activities at The University of Notre Dame are guided by the six research focus areas of ethics, philosophy, theology, catholic education, health and Indigenous studies.

Collaboration and translational research is central to the research culture of The University of Notre Dame. This is facilitated by involvement in research projects in partnership with medical research facilities (e.g. Harry Perkins Institute of Medical Research), specialised centres (WA Phenome Centre) and federal government-funded research initiatives (e.g. Co-operative Research Centres). Research collaboration is also facilitated through the Institute for Ethics and Society, Institute for Health Research and Nulungu Research Institute.

In addition to research undertaken by academic staff and postgraduate students, research projects are an important component of coursework for many undergraduate degrees. Students in the

School of Arts & Sciences at The University of Notre Dame have undertaken a range of research projects supporting local institutions including the City of Fremantle, St Pats Community Centre and the Fremantle Herald. The projects have focused on various focus areas within the research disciplines of politics and international relations, social justice and journalism. As an example, in 2020, approximately 50 students from the School of Arts & Sciences were involved in a project-based learning program with the City of Fremantle developing policy responses to COVID-19 in the focus areas of homelessness, mental health and drug/alcohol addiction. Architecture and urban design is another research discipline where there has been a collaborative relationship with a range of local community institutions in Fremantle.

The Australian Research Council through the ERA evaluation has recognised The University of Notre Dame for the quality of research activity undertaken across a number of academic fields. In the 2018 ERA evaluation, health and medical research at The University of Notre Dame was rated as “at world standard”. At the four-digit Fields of Research (FoR) code level, The University of Notre Dame was assessed as “at world standard” for Clinical Sciences and Oncology and Carcinogenesis, and “above world standard” for Human Movement and Sport Sciences, and Paediatrics and Reproductive Medicine.

Appendices

Input Output Modelling

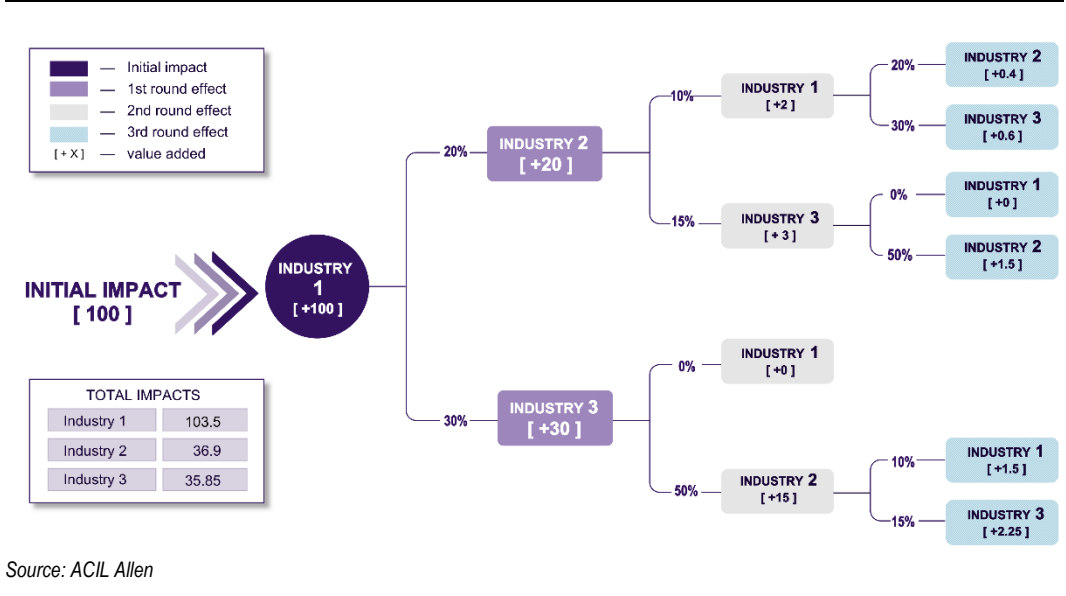
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Input Output models capture the direct and indirect effects of expenditure by capturing, for each industry, the industries it purchases inputs from and also the industries it sells its outputs to. For example, the Input Output model for Western Australia captures purchases from and sales to industries located in Western Australia, as well as imports from outside of Western Australia.

Figure A.1 depicts how an impact is traced through a (very simple) economy with three industries (1, 2, and 3), and is described below.

1. The initial impact occurs in Industry 1 where an additional 100 units of value are added to its output. In order to generate this additional output, Industry 1 requires additional inputs from Industry 2 and Industry 3.
2. Therefore, Industry 2 and 3 increase their output as well. This in turn requires input from Industry 1 and 3 and Industry 1 and 2 respectively which increase their output to satisfy this additional demand, and so on.
3. The impacts grow smaller with each iteration and ultimately converge to zero. This is because they always only share the impact that occurred in the preceding iteration.

Figure A.1 “Trace through” of an Input Output model



A.1 Results of Input Output Modelling

Input Output tables are able to produce results for a range of key economic indicators including:

- real economic output

- industry Gross Value Added
- incomes; and
- employment

The following table details the sectors that Input Output tables are able to produce results for.

Table A.1 Sectors of ACIL Allen's Input Output Tables

Sector	Sector	Sector
1 Paddy rice	24 Dairy products	47 Metal products
2 Wheat	25 Processed rice	48 Motor vehicle and parts
3 Cereal grains nec	26 Sugar	49 Transport equipment nec
4 Vegetables, fruit, nuts	27 Food products nec	50 Electronic equipment
5 Oil seeds	28 Wine	51 Machinery and equipment nec
6 Sugar cane, sugar beef	29 Beer	52 Manufactures nec
7 Plant- based fibres	30 Spirits and RTDs	53 Electricity generation
8 Crops nec	31 Other beverages and tobacco products	54 Electricity transmission and distribution
9 Bovine cattle, sheep, goats, horses	32 Textiles	55 Gas manufacture, distribution
10 Animal products nec	33 Wearing apparel	56 Water
11 Raw milk	34 Leather products	57 Construction
12 Wool, silk worm cocoons	35 Wood products	58 Trade
13 Forestry	36 Paper products, publishing	59 Road transport
14 Fishing	37 Diesel (incl. nonconventional diesel)	60 Rail and pipeline transport
15 Brown coal	38 Other petroleum, coal products	61 Water transport
16 Black coal	39 Chemical, rubber, plastic products	62 Air transport
17 Oil	40 Iron ore	63 Transport nec
18 Liquefied natural gas (LNG)	41 Bauxite	64 Communication
19 Other natural gas	42 Mineral products nec	65 Financial services nec
20 Minerals nec	43 Ferrous metals	66 Insurance
21 Bovine meat products	44 Alumina	67 Business services nec
22 Meat products nec	45 Primary aluminium	68 Recreational and other services
23 Vegetables oils and fats	46 Metals nec	69 Public Administration, Defence, Education, Health

Source: ACIL Allen

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