

 Lawrence Consulting | **Economic Impact of
Strawberry Fields 2016**

Prepared for Strawberry Music Group Pty Ltd

July 2017





EXECUTIVE SUMMARY

Lawrence Consulting was commissioned by Strawberry Music Group Pty Ltd to undertake an assessment of the economic impact of Strawberry Fields 2016, together with the associated visitor impact, on the Berrigan Shire, Greater Boarder region (including the Shire of Moira and City of Greater Shepparton) and Australia. Strawberry Fields is a multi-day music & arts festival that has been held in the Berrigan Shire annually each November since 2011.

The economic impact assessment has concentrated on the quantitative impact of Strawberry Fields 2016, specifically the impact of spending in Berrigan Shire and the Greater Boarder region of visitors to the event together with the turnover of Strawberry Music Group Pty Ltd and consequent local and regional purchases of goods and services. Also of major importance, but not included in the analysis due to the difficulty to enumerate, are the qualitative long-term effects on regional marketing and competitiveness of out-of-region visitors, cumulative television audiences and newspaper and online media coverage.

The total local expenditure by event organisers on Strawberry Fields 2016 was approximately \$267,000 in Berrigan Shire and a further \$121,000 in the Greater Boarder region. The total number of persons attending the event in 2016, including event staff and suppliers, was estimated at 6,500 persons, the origin of whom included the following patterns:

- 79% of festival participants were from the Melbourne region;
- 8% were from the remainder of Victoria;
- 9% were from New South Wales/ACT; and
- A further 4% were from other States.

Taking into account regional length of stay, visitor origin and expenditure patterns, the gross annual stimulus to the Berrigan Shire and Greater Boarder region economies associated with the total attendance numbers at Strawberry Fields 2016 were estimated at \$614,350 and \$819,150, respectively.

Table E1: Gross Indirect Visitor Expenditure by Type, Strawberry Fields 2016 (\$)

Expenditure type	Berrigan Shire	Greater Boarder region
Food & beverage	180,907	241,209
Road transport	6,994	9,325
Retail shopping	385,215	513,620
Attractions	30,072	40,096
Other	11,171	14,895
Total off-site expenditure	614,359	819,145

The total estimated direct and indirect economic impacts associated with Strawberry Fields 2016 on the Berrigan Shire and the Greater Boarder region in 2015/16 include (refer Table E2):

- Total output of \$1.2 million in Berrigan Shire and \$2.5 million in the Greater Boarder region;
- Estimated total income (wages and salaries) of \$306,700 in Berrigan Shire and \$630,200 in the Greater Boarder region;
- Approximately 7.3 full-time equivalent (FTE) employment positions in Berrigan Shire and 13.6 FTEs in the Greater Boarder region; and
- An estimated contribution to GRP of \$584,000 in Berrigan Shire and \$1.3 million in the Greater Boarder region. The total value added impact of Strawberry Fields 2016 represents approximately 0.2% of the total GRP for Berrigan Shire (\$321.7 million in 2015/16).

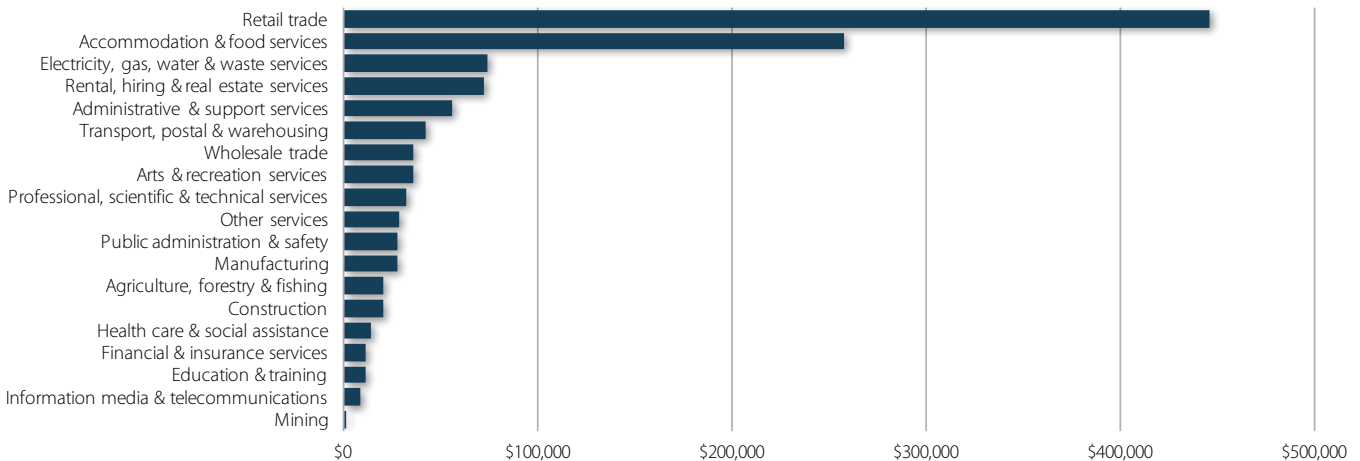
Table E2: Summary of Economic Impacts of Strawberry Fields 2016

	Berrigan Shire	Greater Boarder region	Australia
Local expenditure			
Output (\$)	334,025	781,750	1,193,119
Income (\$)	63,143	157,147	286,905
Employment (fte persons)	1.1	2.9	4.4
Value added (\$)	114,718	323,902	607,218
Indirect visitor spending			
Output (\$)	888,871	1,753,556	2,443,958
Income (\$)	243,514	473,092	702,496
Employment (fte persons)	6.1	10.7	13.5
Value added (\$)	469,323	974,166	1,487,499
Total Strawberry Fields 2016			
Output (\$)	1,222,897	2,535,306	3,637,077
Income (\$)	306,656	630,239	989,401
Employment (fte persons)	7.3	13.6	17.9
Value added (\$)	584,040	1,298,068	2,094,717

The flow-on impacts from Strawberry Fields 2016 to other industries across the Berrigan Shire is significant and has been disaggregated in order to measure the contribution in other areas of the local economy. The following graph shows that the Retail Trade sector benefits most in terms of total output (\$445,900), followed by Accommodation & Food Services (\$258,100), Electricity, Gas, Water & Waste Services (\$74,300) and Rental, Hiring & Real Estate Services (\$72,000).

Estimated Local Business Turnover Supported by Strawberry Fields 2016

Berrigan Shire





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INTRODUCTION

Lawrence Consulting was commissioned by Strawberry Music Group Pty Ltd to undertake an assessment of the economic impact of Strawberry Fields 2016, together with the associated visitor impact, on the Berrigan Shire, Greater Boarder region (including the Shire of Moira and City of Greater Shepparton) and Australia.

Strawberry Fields is a multi-day music & arts festival that has been held in the Berrigan Shire annually each November since 2011. Showcasing live music from Australia and overseas alongside multiple art installations, murals, a thriving market area and the picturesque surrounds of the iconic Murray River.

Primary features include:

- Three stages showcasing live music and DJs;
- Cafes, food and retail stalls trading throughout the weekend;
- Speakers and workshops featured during the day time;
- Art installations, murals and projections;
- Two bars serving craft ciders, beers and a limited range of spirits; and
- 100% of patrons camping on site throughout weekend.

The economic impact assessment has concentrated on the quantitative impact of Strawberry Fields 2016, specifically the impact of spending in Berrigan Shire and the Greater Boarder region of visitors to the event together with the turnover of Strawberry Music Group Pty Ltd and consequent local and regional purchases of goods and services. Also of major importance, but not included in the analysis due to the difficulty to enumerate, are the qualitative long-term effects on regional marketing and competitiveness of out-of-region visitors, cumulative television audiences and newspaper and online media coverage.

The following sections of this report present the results of the economic impact analysis.

Disclaimer

Lawrence Consulting does not warrant the accuracy of this information and accepts no liability for any loss or damage that you may suffer as a result of your reliance on this information, whether or not there has been any error, omission or negligence on the part of Lawrence Consulting or its employees.

Prepared by:





ECONOMIC IMPACT ANALYSIS

Approach

Cultural activities such as Strawberry Fields 2016 generate economic benefits for the local and regional economy through operational expenditure associated with the organisation / event as well as benefits associated with tourism expenditure / turnover within the region. As a part of ongoing operations, economic impacts from Strawberry Fields are generated by organisational and facility operations, visiting performers and spectator spending. The most visible direct impacts are spectator spending on tickets, food and beverages, parking, merchandise and camping at the venue, whilst subsequent rounds of spending include indirect or off-site tourism expenditure and business supply chain purchases.

The contribution made by Strawberry Fields 2016 to the economies of the Berrigan Shire, Greater Boarder region and Australia has been assessed using regional input-output tables developed specifically for each region. All input data, except where referenced in the report, has been supplied by the proponent, Strawberry Music Group Pty Ltd.

The stimulus from economic activity can be traced through the economy in several different ways:

- The first round effect, or direct effect, are those from the activities expenditure in purchasing goods from other industries;
- The second round effects are those from the supplying industries increasing their purchases to meet the additional demand. The second and subsequent rounds of purchasing are termed the indirect effects; and
- The consumption-induced effects, which recognise that the level of local production is important in determining regional levels of household consumption, that this in turn will be spent locally to a large extent and therefore influence the level of regional consumption and the level of output of each sector.

(Note: Caution should be exercised when interpreting the consumption impacts as they are generally expected to overestimate the actual impact.)

These effects can be represented by multipliers. There are commonly four different types of multipliers:

- Output;
- Income;
- Employment; and
- Value added.

Output

The output impact measures the increase in gross sales throughout the whole economy by summing all the individual transactions resulting, directly and indirectly, from the economic stimulus. The output impacts, are however, regarded as overstating the impact on the economy as they count all goods and services used in one stage of production as an input to later stages of production, hence counting their contribution more than once.

Income

The income impact measures the additional amount of wages and salaries paid to employees of the industry under consideration and to other industries benefiting from the stimulus to the economy.



Employment

The employment impact measures the number of jobs created by the stimulus, both directly and indirectly. It should be noted that the short-term response to increased demand might be for employers to ask existing staff to work overtime. As a consequence, lower employment than the level indicated by the economic impact of the stimulus will result. This short-term scenario is particularly true where the demand stimulus is seen as temporary or where there is spare capacity in the economy (i.e. unemployment).

Value Added

The value added or Gross Regional Product¹ (GRP) impact measures only the net activity at each stage of production. GRP is defined as the addition of consumption, investment and government expenditure, plus exports of goods and services, minus imports of goods and services for a region. The GRP impacts are the preferred measure for the assessment and contribution of a stimulus to the economy.

Limitations

Limitations or qualifiers that should be raised when using input-output analysis include:

- The inputs purchased by each industry are a function of the level of output of that industry. The input function is generally assumed linear and homogenous of degree one (which implies constant returns to scale and no substitution between inputs);
- Each commodity (or group of commodities) is supplied by a single industry or sector of production. This implies that there is only one method used to produce each commodity and that each sector has only a single primary output;
- The total effect of carrying on several types of production is the sum of the separate effects. This rules out external economies and diseconomies and is known simply as the additivity assumption. This generally does not reflect real world operations;
- The system is in equilibrium at given prices. This is obviously not the case in an economic system subject to external influences;
- In the static input-output model, there are no capacity constraints so that the supply of each good is perfectly elastic. Each industry can supply whatever quantity is demanded of it and there are no capital restrictions. This assumption would come into play depending upon the magnitude of the changes in quantities demanded, brought about through changes in taxation levels; and
- The input-output model is an optimisation model that allocates resources between sectors to their most efficient use. This is not expected to happen all of the time in the “real world” and as such results from the input output analysis may overestimate the actual impact delivered on ground.

Input-output techniques provide a solid approach for taking account of the inter-relationships between the various sectors of the economy in the short-term and hence are an appropriate tool for determining the direct and indirect economic impact of Strawberry Fields 2016.

¹ This is also known as Gross State Product (GSP) or Gross National Product (GNP) depending on the level of the analysis.

Description of Stimulus

Data Inputs

The assessment is to estimate the economic impact to the Berrigan Shire and Greater Boarder region of the operation of Strawberry Fields 2016 and the indirect tourism benefits generated by increased visitor levels. The sectors of the economy that will be impacted through the analysis include:

Table 1: Strawberry Fields 2016 Economic Impact Assessment, Industry Sectors Affected

• Waste Collection, Treatment and Disposal Services	• Rental and Hiring Services (except Real Estate)
• Construction Services	• Professional, Scientific and Technical Services
• Wholesale Trade	• Employment, Travel Agency and Other Administrative Services
• Retail Trade	• Public Administration and Regulatory Services
• Accommodation	• Public Order and Safety
• Food and Beverage Services	• Heritage, Creative and Performing Arts
• Road Transport	• Personal Services

The total local expenditure by event organisers on Strawberry Fields 2016 was approximately \$267,000 in Berrigan Shire and a further \$121,000 in the Greater Boarder region. A summary of local expenditure by region is provided in the following table.

Table 2: Strawberry Fields 2016 Local Expenditure by Region of Purchase

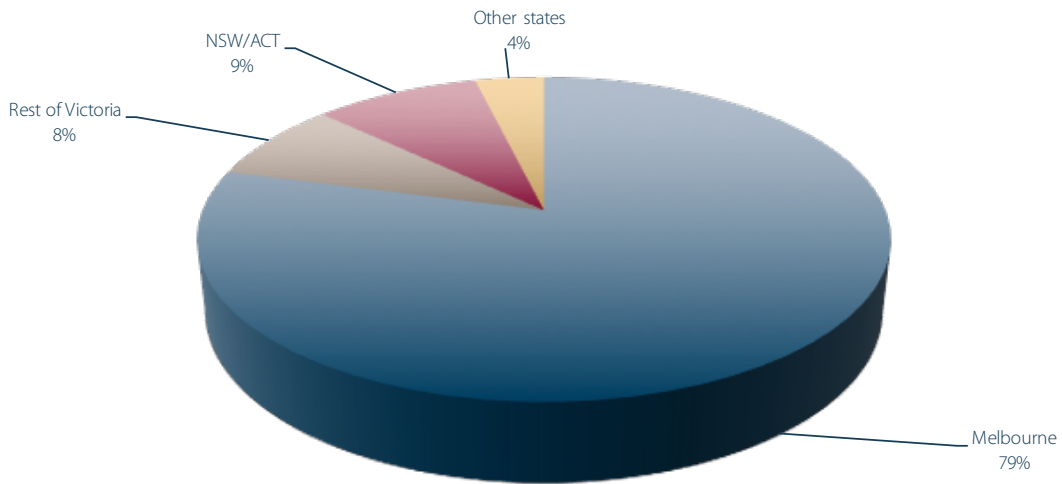
Expenditure type	Region		
	Berrigan Shire	Greater Boarder region	Total
Artist Hotels	\$5,320	\$0	\$5,320
Artist Performance Fees - Domestic	\$0	\$1,500	\$1,500
Bar Supplies	\$11,503	\$1,450	\$12,953
Building Supplies	\$5,738	\$35,515	\$41,253
Community BBQ	\$15,264	\$0	\$15,264
Community Grants Funding	\$18,613	\$0	\$18,613
Electrical	\$8,250	\$0	\$8,250
Equipment Hire	\$6,025	\$55,114	\$61,138
Equipment Purchase	\$24,785	\$3,270	\$28,054
Marketing & Promotion	\$3,733	\$0	\$3,733
Rubbish & Waste Management	\$27,086	\$16,048	\$43,134
Security	\$6,000	\$0	\$6,000
Staff & Contractors	\$34,244	\$0	\$34,244
Staff Catering	\$13,011	\$0	\$13,011
Toilets & Water Access	\$16,771	\$1,430	\$18,201
Traffic Management	\$1,990	\$2,367	\$4,357
Transport & Fuel	\$4,756	\$4,200	\$8,956
Venue Hire & Stakeholder Management	\$64,004	\$190	\$64,194
Total	\$267,092	\$121,084	\$388,176

Strawberry Fields is also a significant cultural and tourism attraction for both local residents and visitors to the region. The total number of persons attending the event in 2016, including event staff and suppliers, was estimated at 6,500 persons, as determined through individual ticket sales. Based on ticket sales, the origin of attendees was determined, including the following patterns:

- 79% of festival participants were from the Melbourne region;
- 8% were from the remainder of Victoria;
- 9% were from New South Wales/ACT; and
- A further 4% were from other States.



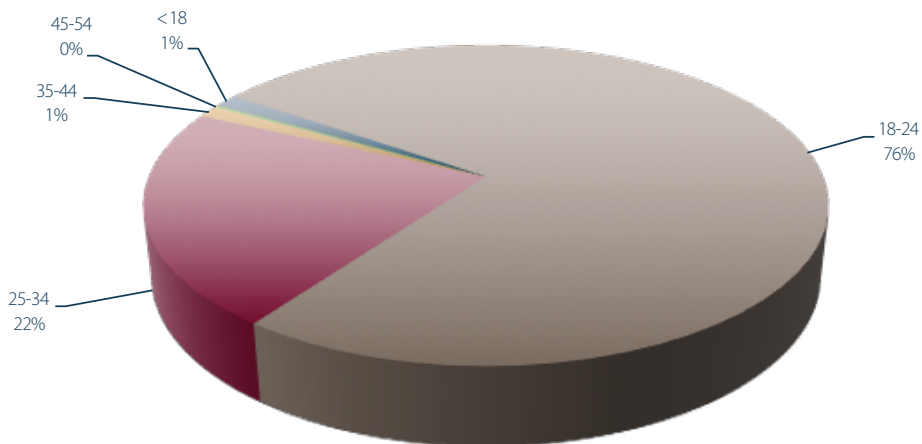
Strawberry Fields Attendance by Origin, 2016



Source: Strawberry Fields

Specific demographic data for festival participants in 2016 is not available, however trends from ticket sales for the 2017 event have been analysed to show the characteristics of attendees. Approximately 50.2% of attendees were female and 49.8% were male. The age distribution of people attending Strawberry Fields 2017 shows the largest share occurring in the 18-24 years age bracket (76%), followed by the 25-34 years (22%) age bracket whilst the average age of people attending is 23.1 years.

Strawberry Fields Attendance by Age, 2017



Source: Strawberry Fields

Taking into account regional length of stay, visitor origin and expenditure patterns, the gross annual stimulus to the Berrigan Shire and Greater Boarder region economies associated with the total attendance numbers at Strawberry Fields 2016 were estimated at \$614,350 and \$819,150, respectively. A summary of the indirect tourism expenditure is provided in the following table.

**Table 4: Gross Indirect Visitor Expenditure by Type, Strawberry Fields 2016 (\$)**

Expenditure type	Berrigan Shire	Greater Boarder region
Food & beverage	180,907	241,209
Road transport	6,994	9,325
Retail shopping	385,215	513,620
Attractions	30,072	40,096
Other	11,171	14,895
Total off-site expenditure	614,359	819,145

Disaggregated industry outputs were provided as part of the analysis to demonstrate the impacts of Strawberry Fields 2016 on all 114 sectors included in the input-output model; these are provided in Appendix A.

Displacements & Leakages

Displacement arises when an economic stimulus such as Strawberry Fields 2016 takes market share from other existing local firms or organisations, or 'displaces' alternative uses of project funds that might otherwise have occurred. Leakages are defined as the proportion of project outputs that flow out of the catchment area, i.e. purchases from outside the region.

In relation to the operation of Strawberry Fields 2016 and the indirect tourism benefits created by the facility, for the purpose of this analysis it has been assumed that both the Berrigan Shire and Greater Boarder region are closed economies, i.e. any displacement and leakages are considered marginal. All expenditure related to the stimulus has been assumed to be made within each region – where not otherwise identified – in order to represent the additional economic activity generated by Strawberry Fields 2016.



Impact Assessment

Direct Operating Expenditure

The net annual regional economic impact – i.e. direct, indirect and consumption-induced – associated with the operation of Strawberry Fields 2016 on the Berrigan Shire include (refer table below):

- An estimated direct output of \$267,100 and additional flow on increases in output of \$27,600 through other industries, for a total industry impact of \$294,700. A further \$39,300 in output in the region can be associated with consumption-induced effects;
- Estimated direct income (wages and salaries) of \$47,300, with \$5,600 in additional income generated through flow on effects in other industries and a further \$10,200 from household spending;
- Approximately 0.8 direct full-time equivalent (FTE) employment positions, with an estimated additional 0.3 employment positions supported indirectly through other industries and household consumption for a total employment impact of 1.1 FTEs; and
- An estimated contribution to GRP of \$80,400 from direct effects, with a further flow on impact of \$13,200 through other industries for a total industry value added of \$93,700. An additional \$21,000 in gross regional product can be attributed to consumption-induced effects.

Table 5: Economic Impact of Strawberry Fields 2016, Direct Operating Expenditure

	Berrigan Shire	Greater Boarder region	Australia
Output (\$)			
Direct	267,092	388,176	388,176
Indirect	27,618	156,384	324,658
Consumption	39,315	237,191	480,286
Total	334,025	781,750	1,193,119
Income (\$)			
Direct	47,281	61,180	61,180
Indirect	5,638	29,539	71,887
Consumption	10,224	66,428	153,838
Total	63,143	157,147	286,905
Employment (fte persons)			
Direct	0.8	1.2	1.2
Indirect	0.1	0.4	0.9
Consumption	0.2	1.3	2.3
Total	1.1	2.9	4.4
Value added (\$)			
Direct	80,429	106,614	106,614
Indirect	13,242	76,067	156,488
Consumption	21,046	141,221	344,116
Total	114,718	323,902	607,218



Indirect Visitor Expenditure

The economic impacts of the indirect visitor expenditure associated with Strawberry Fields 2016 for the Berrigan Shire include (refer table below):

- An estimated direct output of \$614,400 and additional flow on increases in output of \$122,900 through other industries, for a total industry impact of \$737,200. A further \$151,600 in output in the region can be associated with consumption-induced effects;
- Estimated direct income (wages and salaries) of \$179,000, with \$25,100 in additional income generated through flow on effects in other industries and a further \$39,400 from household spending;
- Approximately 4.9 direct full-time equivalent (FTE) employment positions, with an estimated additional 1.2 employment positions supported indirectly through other industries and household consumption for a total employment impact of 6.1 FTEs; and
- An estimated contribution to GRP of \$329,000 from direct effects, with a further flow on impact of \$59,100 through other industries for a total industry value added of \$388,200. An additional \$81,200 in gross regional product can be attributed to consumption-induced effects.

Table 6: Economic Impact of Strawberry Fields 2016, Indirect Visitor Expenditure

	Berrigan Shire	Greater Boarder region	Australia
Output (\$)			
Direct	614,359	819,145	819,145
Indirect	122,891	393,117	615,064
Consumption	151,622	541,294	1,009,749
Total	888,871	1,753,556	2,443,958
Income (\$)			
Direct	178,956	238,608	238,608
Indirect	25,129	68,657	122,386
Consumption	39,429	165,827	341,503
Total	243,514	473,092	702,496
Employment (fte persons)			
Direct	4.9	6.5	6.5
Indirect	0.4	1.1	1.7
Consumption	0.8	3.2	5.3
Total	6.1	10.7	13.5
Value added (\$)			
Direct	329,042	438,723	438,723
Indirect	59,115	182,102	285,688
Consumption	81,166	353,341	763,089
Total	469,323	974,166	1,487,499



Summary of Impacts

The economic impact of the operations of Strawberry Fields 2016 and those of indirect regional participant spending can be aggregated to achieve an overall annualised estimate of the impact on the economies of the Berrigan Shire, the Greater Boarder region and Australia. It is difficult to be definitive regarding how much of the regional off-site spectator spending impact will accrue within the Berrigan Shire, as opposed to elsewhere in the Greater Boarder region, given Berrigan Shire faces capacity constraints in key sectors (e.g. accommodation stock, local supply chain, etc.). The input data has, however, allowed for differentiation of Berrigan Shire and rest of the Greater Boarder region spending for both operational-based and indirect tourism expenditure.

Following this estimation, the direct and total economic impacts associated with Strawberry Fields 2016 on the Berrigan Shire and the Greater Boarder region in 2015/16 are provided in the following table and include:

- Total output of \$1.2 million in Berrigan Shire and \$2.5 million in the Greater Boarder region;
- Estimated total income (wages and salaries) of \$306,700 in Berrigan Shire and \$630,200 in the Greater Boarder region;
- Approximately 7.3 full-time equivalent (FTE) employment positions in Berrigan Shire and 13.6 FTEs in the Greater Boarder region; and
- An estimated contribution to GRP of \$584,000 in Berrigan Shire and \$1.3 million in the Greater Boarder region. The total value added impact of Strawberry Fields 2016 represents approximately 0.2% of the total GRP for Berrigan Shire (\$321.7 million in 2015/16).

Table 7: Summary of Economic Impacts of Strawberry Fields 2016

	Berrigan Shire	Greater Boarder region	Australia
Local expenditure			
Output (\$)	334,025	781,750	1,193,119
Income (\$)	63,143	157,147	286,905
Employment (fte persons)	1.1	2.9	4.4
Value added (\$)	114,718	323,902	607,218
Indirect visitor spending			
Output (\$)	888,871	1,753,556	2,443,958
Income (\$)	243,514	473,092	702,496
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Value added (\$)	469,323	974,166	1,487,499
Total Strawberry Fields 2016			
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The flow-on impacts from Strawberry Fields 2016 to other industries across the Berrigan Shire is significant and has been disaggregated in order to measure the contribution in other areas of the local economy. The following table demonstrates that the Retail Trade sector benefits most in terms of total output (\$445,900), followed by Accommodation & Food Services (\$258,100), Electricity, Gas, Water & Waste Services (\$74,300) and Rental, Hiring & Real Estate Services (\$72,000).

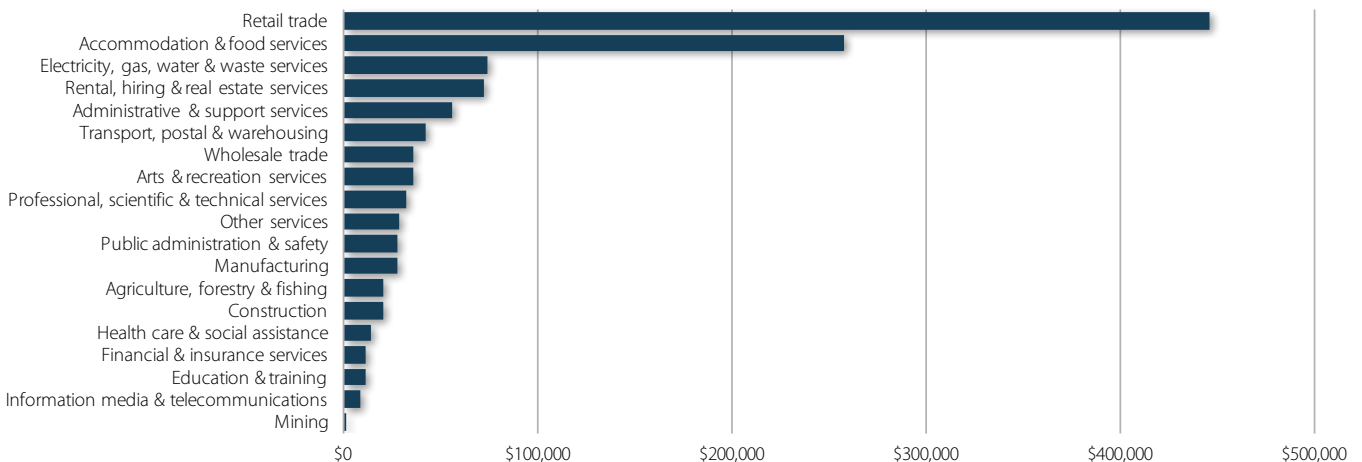


Table 8: Estimated Disaggregated Local Industry Impacts of Strawberry Fields 2016

Industry division	Industry output (\$)	Direct employment (FTEs)
Agriculture, Forestry and Fishing	20,855	0.1
Mining	321	0.0
Manufacturing	27,949	0.1
Electricity, Gas, Water and Waste Services	74,288	0.0
Construction	20,280	0.0
Wholesale Trade	35,900	0.1
Retail Trade	445,891	3.8
Accommodation and Food Services	258,129	2.1
Transport, Postal and Warehousing	42,126	0.1
Information Media and Telecommunications	8,475	0.0
Financial and Insurance Services	11,541	0.0
Rental, Hiring and Real Estate Services	72,018	0.0
Professional, Scientific and Technical Services	31,873	0.1
Administrative and Support Services	56,214	0.2
Public Administration and Safety	28,055	0.1
Education and Training	11,389	0.1
Health Care and Social Assistance	13,731	0.1
Arts and Recreation Services	35,695	0.0
Other Services	28,166	0.2
Total	1,222,897	7.3

Estimated Local Business Turnover Supported by Strawberry Fields 2016

Berrigan Shire



APPENDIX A: DISAGGREGATED INDUSTRY OUTPUT

Table A1: Estimated Disaggregated Industry Impacts of Strawberry Fields 2016 – Berrigan Shire

Industry sector	Industry output (\$)	Direct employment (FTEs)
Poultry and Other Livestock	5,945	0.021
Sheep, Grains, Beef and Dairy Cattle	0	0.000
Other Agriculture	13,399	0.036
Aquaculture	0	0.000
Forestry and Logging	0	0.000
Fishing, hunting and trapping	0	0.000
Agriculture, Forestry and Fishing Support Services	1,511	0.002
Coal mining	0	0.000
Oil and gas extraction	0	0.000
Iron Ore Mining	0	0.000
Non Ferrous Metal Ore Mining	0	0.000
Non Metallic Mineral Mining	321	0.001
Exploration and Mining Support Services	0	0.000
Meat and Meat product Manufacturing	0	0.000
Processed Seafood Manufacturing	0	0.000
Dairy Product Manufacturing	4,830	0.007
Fruit and Vegetable Product Manufacturing	4,093	0.011
Oils and Fats Manufacturing	0	0.000
Grain Mill and Cereal Product Manufacturing	0	0.000
Bakery Product Manufacturing	5,188	0.034
Sugar and Confectionery Manufacturing	0	0.000
Other Food Product Manufacturing	0	0.000
Soft Drinks, Cordials and Syrup Manufacturing	0	0.000
Beer Manufacturing	0	0.000
Wine, Spirits and Tobacco	5,174	0.011
Textile Manufacturing	0	0.000
Tanned Leather, Dressed Fur and Leather Product Manufacturing	0	0.000
Textile Product Manufacturing	451	0.003
Knitted Product Manufacturing	0	0.000
Clothing Manufacturing	0	0.000
Footwear Manufacturing	0	0.000
Sawmill Product Manufacturing	0	0.000
Other Wood Product Manufacturing	287	0.001
Pulp, Paper and Paperboard Manufacturing	0	0.000
Paper Stationery and Other Converted Paper Product Manufacturing	0	0.000
Printing (including the reproduction of recorded media)	0	0.000
Petroleum and Coal Product Manufacturing	0	0.000
Human Pharmaceutical and Medicinal Product Manufacturing	0	0.000
Veterinary Pharmaceutical and Medicinal Product Manufacturing	0	0.000
Basic Chemical Manufacturing	1,067	0.001
Cleaning Compounds and Toiletry Preparation Manufacturing	0	0.000
Polymer Product Manufacturing	0	0.000
Natural Rubber Product Manufacturing	0	0.000
Glass and Glass Product Manufacturing	0	0.000
Ceramic Product Manufacturing	0	0.000
Cement, Lime and Ready-Mixed Concrete Manufacturing	459	0.001
Plaster and Concrete Product Manufacturing	0	0.000
Other Non-Metallic Mineral Product Manufacturing	0	0.000
Iron and Steel Manufacturing	532	0.002
Basic Non-Ferrous Metal Manufacturing	0	0.000

Table A1: Estimated Disaggregated Industry Impacts of Strawberry Fields 2016 – Berrigan Shire

Industry sector	Industry output (\$)	Direct employment (FTEs)
Forged Iron and Steel Product Manufacturing	0	0.000
Structural Metal Product Manufacturing	1,520	0.003
Metal Containers and Other Sheet Metal Product manufacturing	0	0.000
Other Fabricated Metal Product manufacturing	0	0.000
Motor Vehicles and Parts; Other Transport Equipment manufacturing	2,164	0.007
Ships and Boat Manufacturing	0	0.000
Railway Rolling Stock Manufacturing	0	0.000
Aircraft Manufacturing	655	0.002
Professional, Scientific, Computer and Electronic Equipment Manufacturing	0	0.000
Electrical Equipment Manufacturing	0	0.000
Domestic Appliance Manufacturing	0	0.000
Specialised and other Machinery and Equipment Manufacturing	1,530	0.005
Furniture Manufacturing	0	0.000
Other Manufactured Products	0	0.000
Electricity Generation	0	0.000
Electricity Transmission, Distribution, On Selling and Electricity Market Operation	11,393	0.010
Gas Supply	0	0.000
Water Supply, Sewerage and Drainage Services	19,038	0.025
Waste Collection, Treatment and Disposal Services	43,857	0.000
Residential Building Construction	1,813	0.005
Non-Residential Building Construction	0	0.000
Heavy and Civil Engineering Construction	2,373	0.002
Construction Services	16,094	0.038
Wholesale Trade	35,900	0.101
Retail Trade	445,891	3.822
Accommodation	14,039	0.098
Food and Beverage Services	244,090	1.958
Road Transport	29,017	0.115
Rail Transport	0	0.000
Water, Pipeline and Other Transport	1,486	0.002
Air and Space Transport	0	0.000
Postal and Courier Pick-up and Delivery Service	3,123	0.015
Transport Support services and storage	8,500	0.012
Publishing (except Internet and Music Publishing)	4,348	0.016
Motion Picture and Sound Recording	0	0.000
Broadcasting (except Internet)	0	0.000
Internet Service Providers, Internet Publishing and Broadcasting, Websearch Portals and Data Processing	4,127	0.006
Telecommunication Services	0	0.000
Library and Other Information Services	0	0.000
Finance	11,541	0.017
Insurance and Superannuation Funds	0	0.000
Auxiliary Finance and Insurance Services	0	0.000
Rental and Hiring Services (except Real Estate)	72,018	0.000
Ownership of Dwellings	0	0.000
Non-Residential Property Operators and Real Estate Services	0	0.000
Professional, Scientific and Technical Services	31,873	0.112
Computer Systems Design and Related Services	0	0.000
Employment, Travel Agency and Other Administrative Services	51,498	0.129
Building Cleaning, Pest Control and Other Support Services	4,717	0.040
Public Administration and Regulatory Services	20,639	0.098
Defence	0	0.000

**Table A1: Estimated Disaggregated Industry Impacts of Strawberry Fields 2016 – Berrigan Shire**

Industry sector	Industry output (\$)	Direct employment (FTEs)
Public Order and Safety	7,416	0.046
Primary and Secondary Education Services (incl Pre-Schools and Special Schools)	10,285	0.095
Technical, Vocational and Tertiary Education Services (incl undergraduate and postgraduate)	386	0.002
Arts, Sports, Adult and Other Education Services (incl community education)	718	0.008
Health Care Services	3,979	0.030
Residential Care and Social Assistance Services	9,752	0.084
Heritage, Creative and Performing Arts	30,072	0.000
Sports and Recreation	5,623	0.024
Gambling	0	0.000
Automotive Repair and Maintenance	9,738	0.057
Other Repair and Maintenance	3,653	0.019
Personal Services	14,312	0.126
Other Services	464	0.003
Total	1,222,897	7.263