



**Part I**  
**Media Exposure**  
**Branding and Share of Voice Analysis**

**Tourism Tasmania**  
**November 2007**

**S.COMM<sup>®</sup>**

## CONTENTS

<b>1.1 Background</b>	<b>3</b>
1.2 Tasmania Total Exposure Value	4
<b>2.0 Media Analysis</b>	<b>5</b>
2.1 Tasmania Television Exposure by Inventory – Match Coverage	5
2.2 Tasmania Television Exposure by Inventory – Peripheral Coverage	6
2.3 Tasmania Print Exposure by Publication	7
2.4 Tasmania Television Exposure by Broadcast	9
2.5 Tasmania Television Exposure by Market	10
2.6 Tasmania Exposure Value by Month	11
2.7 Exposure Snapshots	12
2.8 Television Audience and Attendance Reach	14
<b>3.0 Benchmarking Analysis</b>	<b>16</b>
3.1 Hawthorn FC Sponsor Exposure Benchmarking	16
3.2 Benchmarking Across all Football Codes	17
3.3 Benchmarking Across the AFL	18
<b>4.0 Glossary of Terms</b>	<b>19</b>
<b>5.0 S-COMM Methodology</b>	<b>20</b>

## 1.1 BACKGROUND

**S-COMM** was commissioned by **Tourism Tasmania** to conduct an independent evaluation of the media exposure generated by the naming rights sponsorship of the Hawthorn Football Club.

**S-COMM** utilised the sponsorship evaluation system **SpindeX2®** to evaluate television exposure and our unique print methodology to determine the value of press publications.

In order to conduct this analysis **S-COMM** analysed:

- Match broadcasts – all live Hawthorn FC matches on Channel Seven, Channel 10 and Fox Sports and first replays via Fox Sports
- Peripheral television coverage – nightly national television news & sports interest programs
- Print media – all major metropolitan newspapers & sports related magazines.

The following report analyses all television and print coverage for the period of **1<sup>st</sup> February to 2<sup>nd</sup> October 2007** including:

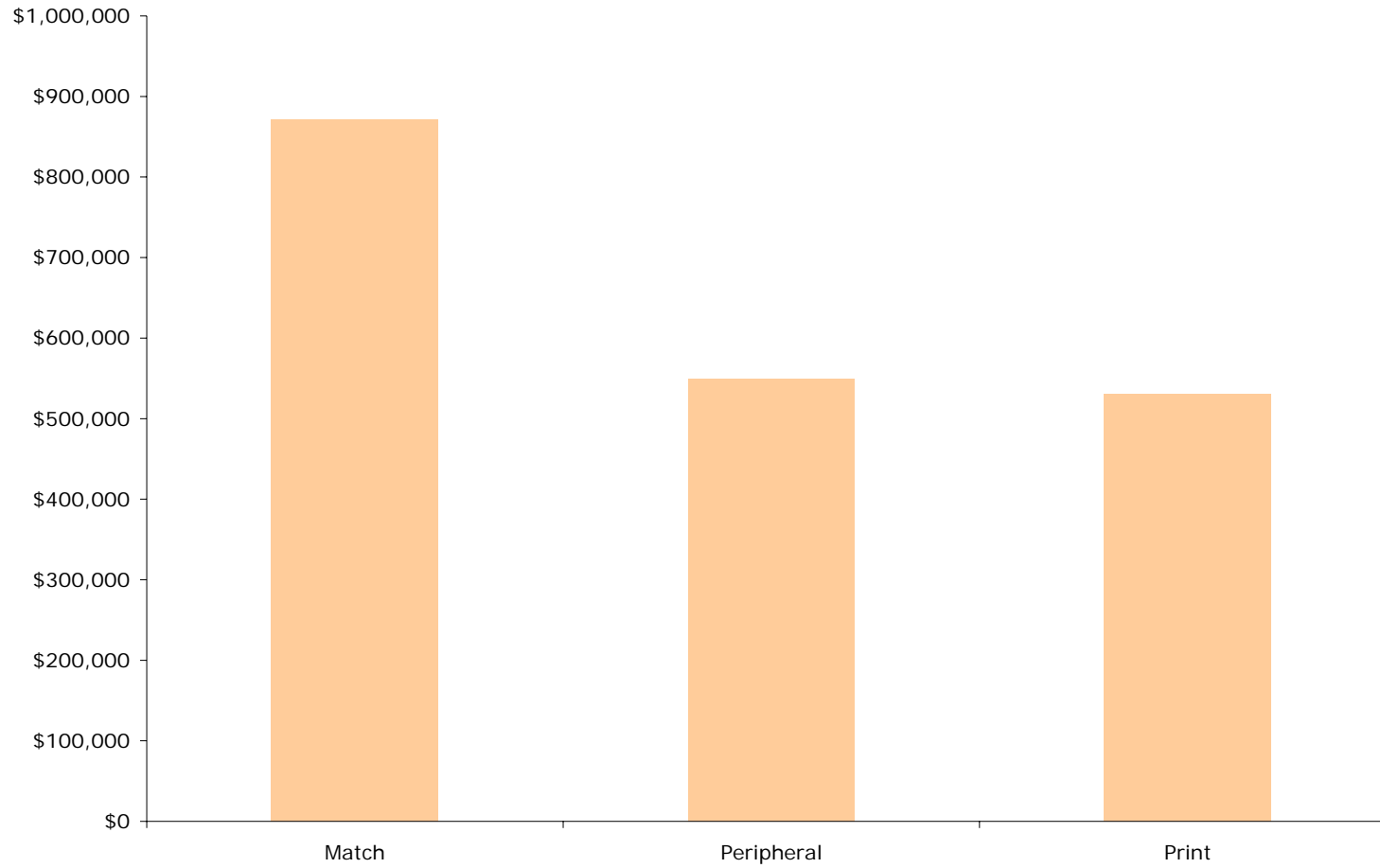
- 2007 nab Cup
- 2007 AFL Premiership Season: Rounds 1-22
- 2007 AFL Finals Series

## 1.2 Tasmania Total Exposure Value

The following table highlights the total media exposure value recorded by Tasmania, throughout the 2007 season:

Sponsor	Match	Peripheral	Print	Total
Tasmania	\$871,095	\$549,280	\$530,168	<b>\$1,950,543</b>

Chart 1: Tasmania Total Exposure Value



## 2.0 MEDIA EXPOSURE ANALYSIS

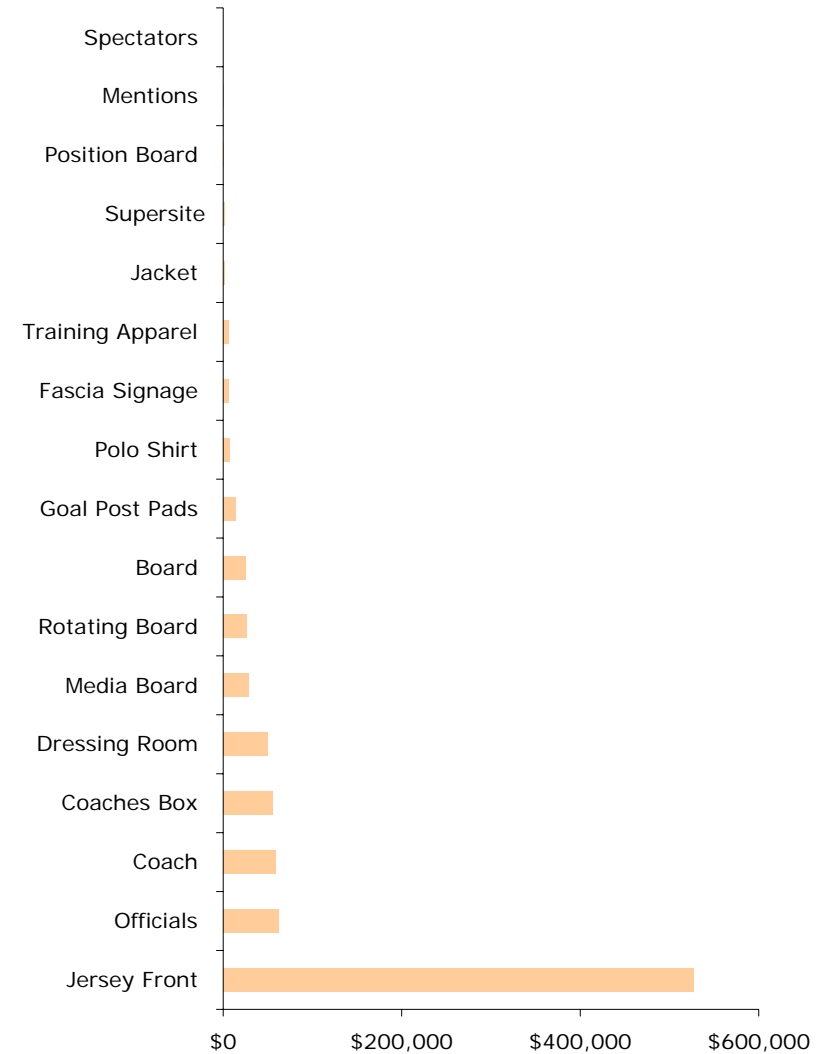
### 2.1 Tasmania Television Exposure by Inventory – Match Coverage

Television match coverage incorporates:

- Live broadcasts on Channel Seven and Channel Ten
- Live broadcasts and first replay on Fox Sports

Chart 2: Match Coverage by Inventory

Inventory	Exposure Time (hr:min:sec)	Spindex® Rating Point (SRP)	Exposure Value
Jersey Front	1:42:44	1310.4	\$526,648
Officials	0:10:20	153.6	\$61,879
Coach	0:05:45	147.2	\$59,129
Coaches Box	0:18:59	278.7	\$56,036
Dressing Room	0:13:07	247	\$49,642
Media Board	0:12:42	144.7	\$29,071
Rotating Board	0:12:19	129.1	\$25,958
Board	1:02:55	340.9	\$24,662
Goal Post Pads	0:09:43	109.4	\$13,570
Polo Shirt	0:02:43	18.2	\$7,305
Fascia Signage	0:06:55	99.8	\$6,687
Training Apparel	0:00:09	15.3	\$6,149
Jacket	0:00:03	4.2	\$1,672
Supersite	0:00:38	7.9	\$1,562
Position Board	0:00:22	3.5	\$463
Mentions	0:00:02	0.7	\$448
Spectators	0:00:02	0.5	\$214
<b>Total</b>	<b>4:19:28</b>	<b>3011.1</b>	<b>\$871,095</b>



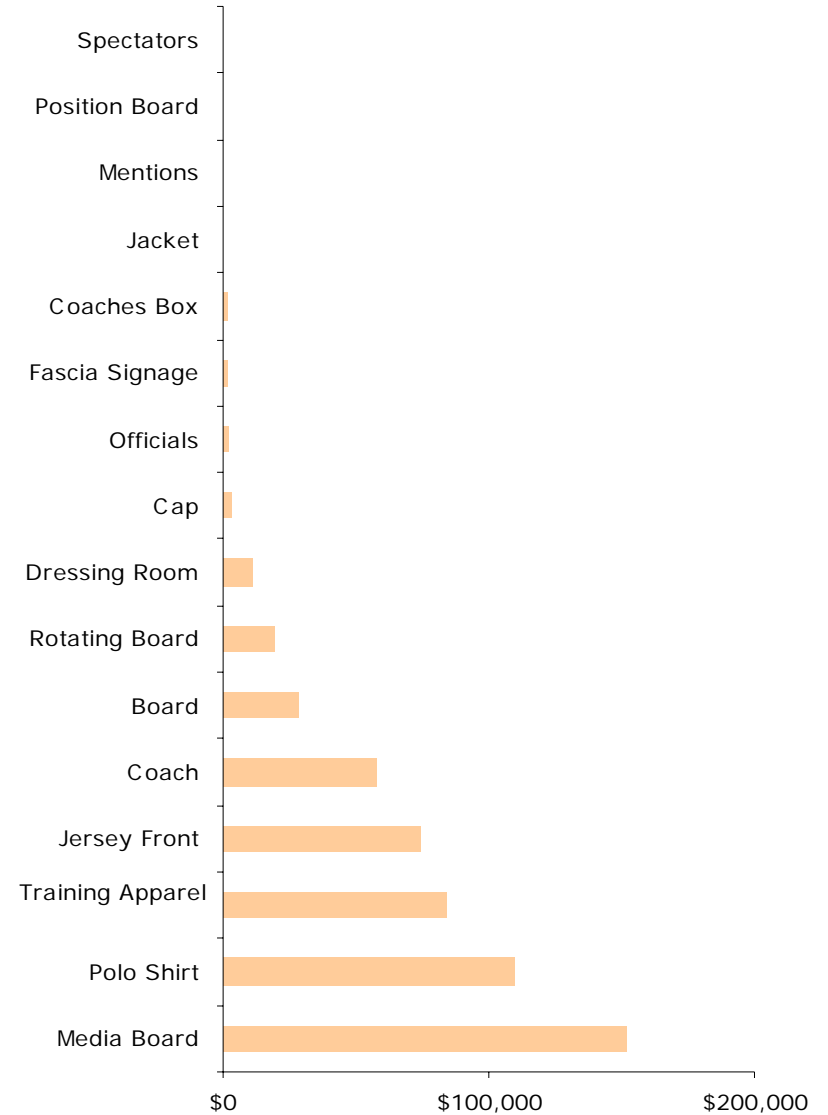
## 2.2 Tasmania Television Exposure by Inventory – Peripheral Coverage

Television peripheral coverage incorporates:

- National nightly news programs
- Associated AFL feature and magazine programs

Chart 3: Peripheral Coverage by Inventory

Inventory	Exposure Time (hr:min:sec)	Spindex® Rating Point (SRP)	Exposure Value
Media Board	0:21:35	756.2	\$151,943
Polo Shirt	0:09:36	272.6	\$109,588
Training Apparel	0:04:03	209.1	\$84,137
Jersey Front	0:04:00	185.6	\$74,606
Coach	0:07:54	144.7	\$58,152
Board	0:05:40	269.9	\$28,385
Rotating Board	0:01:52	98.7	\$19,785
Dressing Room	0:01:27	56.1	\$11,274
Cap	0:00:15	7.8	\$3,136
Officials	0:00:09	5.6	\$2,238
Fascia Signage	0:00:24	28	\$1,875
Coaches Box	0:00:09	9.2	\$1,839
Jacket	0:00:08	2.6	\$1,050
Mentions	0:00:02	1.3	\$895
Position Board	0:00:04	1.4	\$190
Spectators	0:00:01	0.5	\$187
<b>Total</b>	<b>0:57:19</b>	<b>2049.3</b>	<b>\$549,280</b>



## 2.3 Tasmania Print Exposure by Publication

Print media coverage incorporates:

- Major metropolitan and selected newspapers
- Sports related magazines and publications

Publication	Appearances	Editions	Circulation	Value (\$)
<b>Editorial Coverage</b>				
West Australian	1	1	208,000	\$172
Age - Melb	1	1	202,000	\$133
Inside Football	1	1	24,000	\$9
<b>Sub Total</b>	<b>3</b>	<b>3</b>	<b>434,000</b>	<b>\$314</b>
<b>Pictorial Coverage</b>				
Herald Sun - Melb	70	47	25,897,000	\$178,031
Herald Sun - Melb - SAT	16	10	5,090,000	\$69,628
Sunday Age - Melb	16	10	1,990,000	\$60,970
Age - Melb	19	18	3,636,000	\$42,108
Sunday Herald Sun - Melb	24	16	9,920,000	\$29,862
Age - Melb - SAT	8	5	1,765,000	\$29,769
Sunday Telegraph	4	2	1,468,000	\$11,189
Sunday Mail - Ade	5	2	692,000	\$10,987
West Australian - SAT	5	3	1,119,459	\$10,927
West Australian	7	6	1,248,000	\$8,217
Examiner	31	22	797,302	\$7,802
AFL Record	25	16	4,672,000	\$7,639
Sunday Times	9	8	2,949,520	\$7,238
Adelaide Advertiser	10	9	1,854,000	\$7,149
Australian Weekend	2	2	268,000	\$4,769
Courier Mail - Bris	4	4	844,000	\$4,236

### Tasmania Print Media (cont'd)

Publication	Appearances	Editions	Circulation	Value (\$)
Sunday Mail - Bris	2	2	1,180,000	\$3,865
Australian	3	3	413,700	\$3,650
The Advocate	10	8	314,400	\$3,561
Sun Herald	1	1	560,000	\$3,373
Inside Football	24	14	336,000	\$3,213
Inside Sport	6	2	144,000	\$3,123
Geelong Advertiser	12	11	2,750,000	\$3,032
The Mercury	8	7	339,031	\$2,908
Sunday Examiner	7	3	125,331	\$2,579
Daily Telegraph - SAT	1	1	339,000	\$2,524
Gold Coast Bulletin	8	7	329,483	\$2,051
Sydney Morning Herald	1	1	210,000	\$1,590
Canberra Times	3	3	111,000	\$938
Townsville Bulletin	4	4	106,636	\$825
The Herald - SAT	1	1	79,000	\$572
Townsville Bulletin - SAT	2	2	53,318	\$461
The Mercury - Sat	2	2	96,866	\$351
Canberra Times - SAT	2	2	144,000	\$346
Gold Coast Bulletin - SAT	1	1	47,069	\$270
Geelong Advertiser - SAT	1	1	250,000	\$102
<b>Sub Total</b>	<b>354</b>	<b>256</b>	<b>72,139,115</b>	<b>\$529,854</b>
<b>TOTAL</b>	<b>357</b>	<b>259</b>	<b>72,573,115</b>	<b>\$530,168</b>

## 2.4 Tasmania Television Exposure by Broadcast

Total television coverage incorporates:

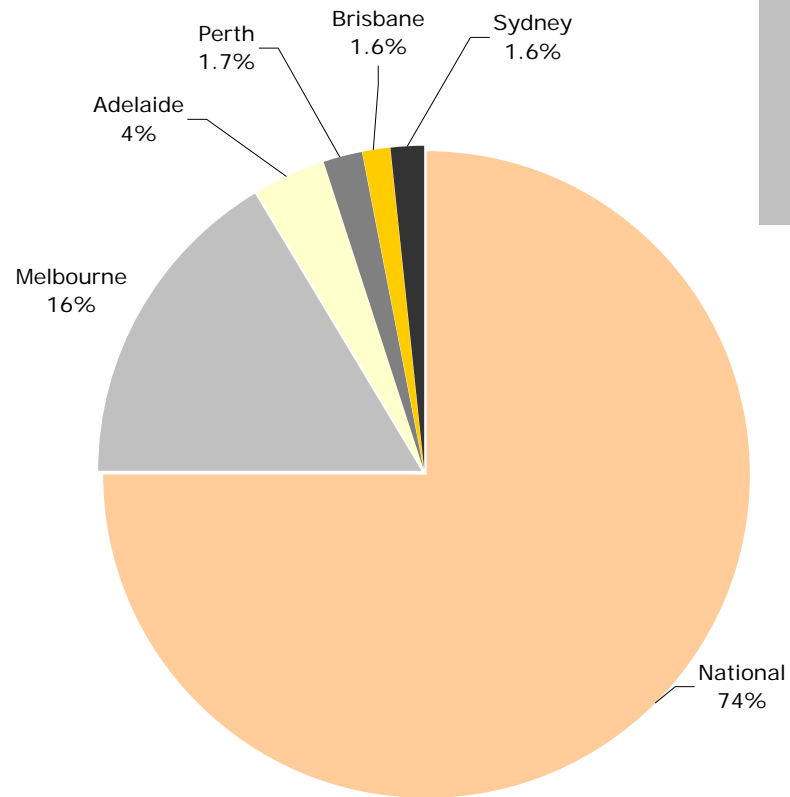
- Live broadcasts on Channel Seven and Channel Ten
- Live broadcasts and first replay on Fox Sports
- National nightly news programs
- Associated AFL feature and magazine programs

Broadcast	Network	Exposure Time (hr:min:sec)	Spindex® Rating Point (SRP)	Exposure Value
AFL Saturday	Channel 10	0:50:01	1017.3	\$274,062
AFL Final Series	Channel 10	0:07:30	461	\$166,702
Fox AFL	Fox Sports	2:10:37	558.7	\$152,362
AFL Sunday	Channel 7	0:55:28	466.1	\$125,248
First at Five News	Channel 10	0:15:39	412.4	\$110,815
Sports Tonight	Channel 10	0:05:43	410.6	\$109,739
National Nine News	Channel 9	0:07:01	337.5	\$83,709
Friday Night AFL	Channel 7	0:07:12	224.2	\$74,386
AFL Monday	Channel 10	0:05:40	242.3	\$61,749
ABC News	ABC	0:07:00	228.2	\$53,752
Seven Nightly News	Channel 7	0:04:06	208	\$52,076
Before the Game	Channel 10	0:05:14	166.5	\$51,380
Sunday AFL Show	Channel 9	0:04:37	87.7	\$33,617
Footy Show AFL	Channel 9	0:01:26	97.9	\$26,859
Footy Classified	Channel 9	0:06:00	53	\$18,057
NAB Cup		0:03:00	41.5	\$16,586
Other	-	0:00:33	47.5	\$9,276
<b>Total</b>		<b>5:16:47</b>	<b>5060.4</b>	<b>\$1,420,375</b>

## 2.5 Tasmania Television Exposure by Market

The following chart highlights the exposure of the Tasmania brand by geographic market i.e. defined by the reach of each specific television broadcast.

Chart 4: Total Television Exposure Share of Voice by Market



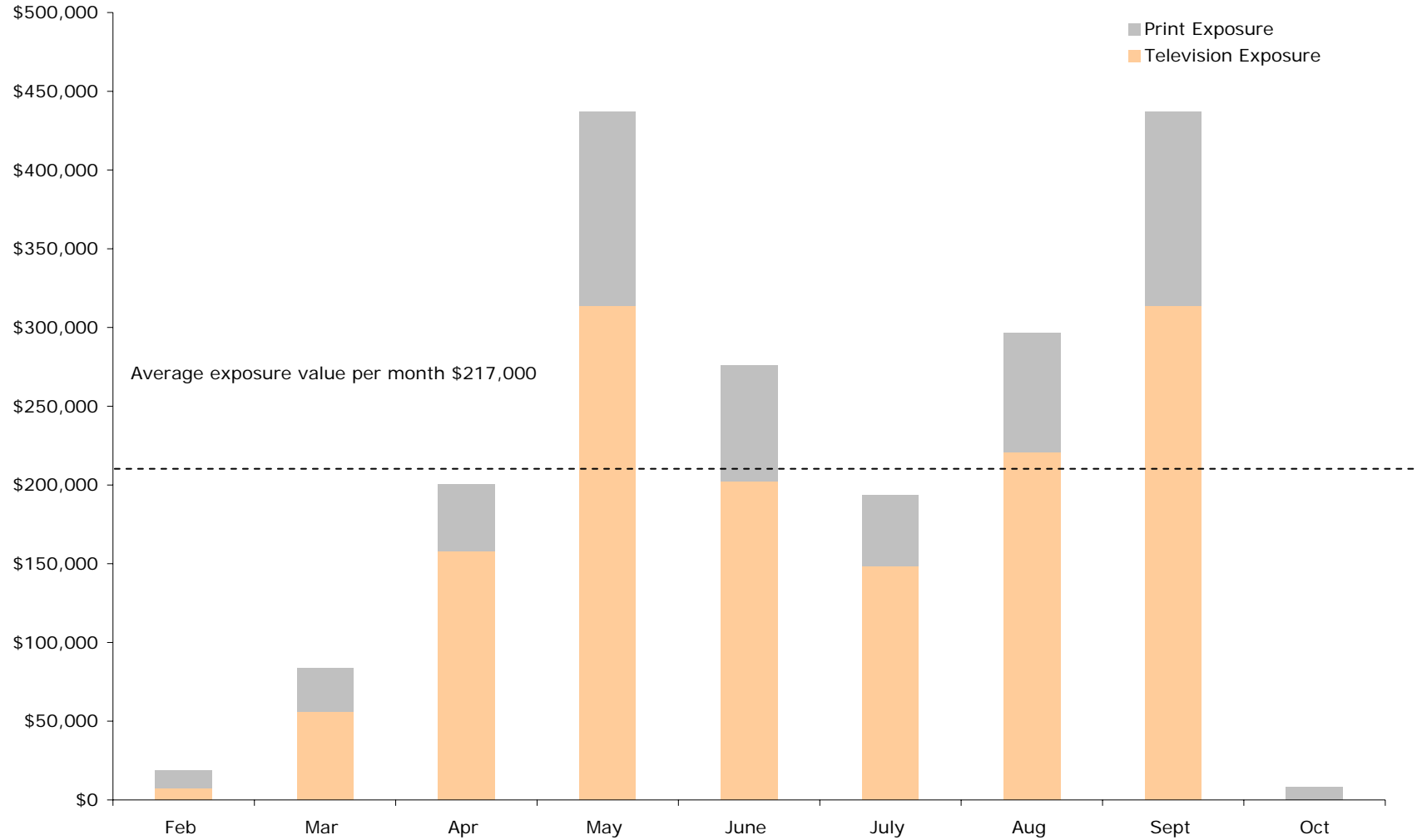
Compared to the national reach of other major sporting seasons:

- Wallabies major partners 60%
- AFL major partners 85%
- FFA major partners 53%
- S14 naming rights 58%
- Aus Open Tennis major partners 86%
- 3 Test Series Cricket 71%
- ODI Cricket 87%

## 2.6 Tasmania Exposure Value by Month

The following chart highlights Tasmania total exposure value by month, throughout the 2007 season.

Chart 5: Total Exposure Value by Month



## 2.7 Exposure Snapshots

1. Jersey front



2. Jersey front



3. Coaches box



4. Jersey front & Dressing room



5. Coaches Box



6. Media Board



7. Rotating board



8. Dressing room signage



9. Board



10. Rotating board



11. Jersey front



12. Jersey front



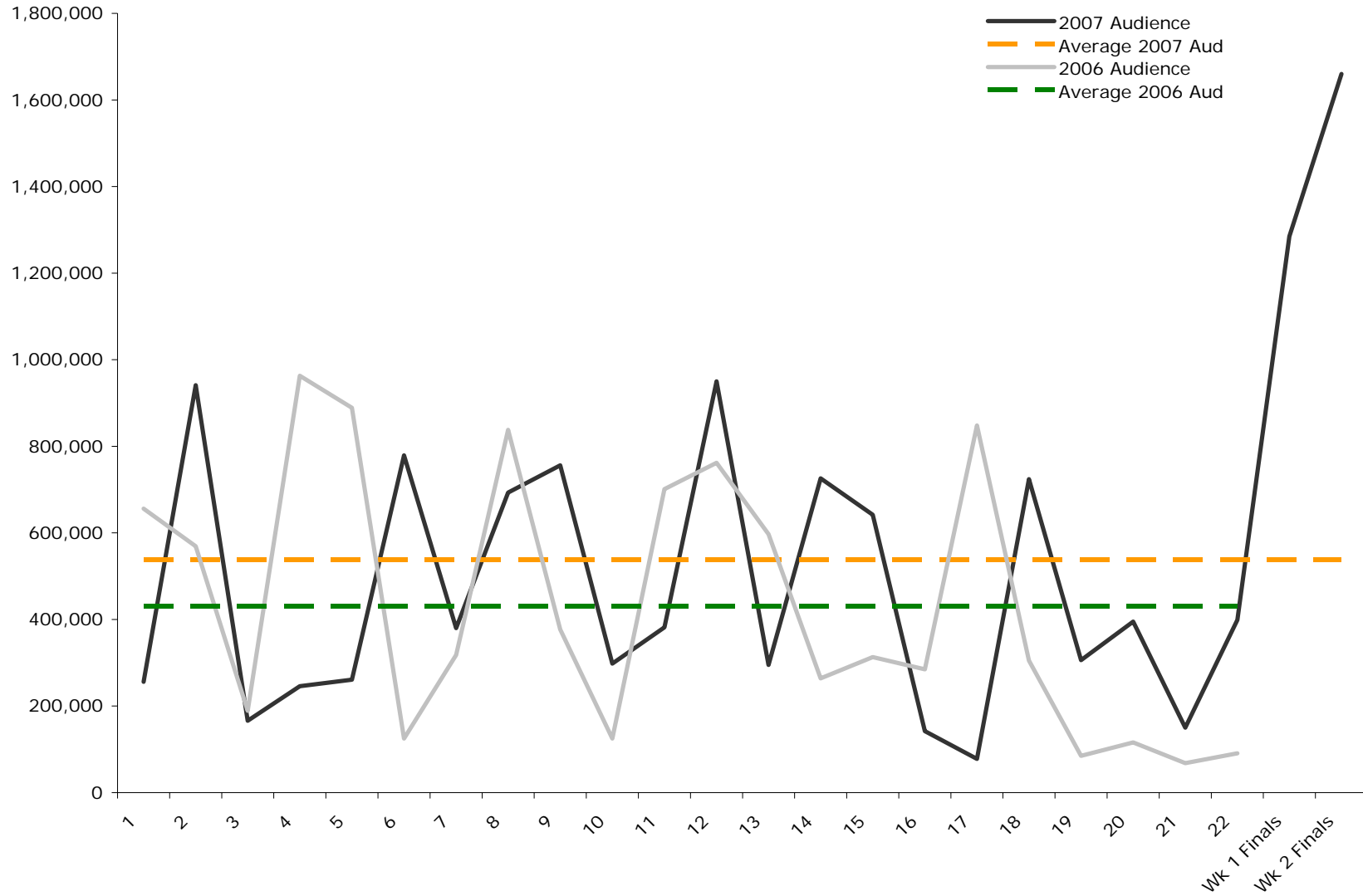
## 2.8 Television Audience and Attendance Reach

The following table highlights television audience and ground attendance reach from the 2007 Hawthorn FC season.

Round	Fixture	Venue	Ground Attendance		FTA Audience	Pay TV Audience
			Home	Away		
1	Brisbane Lions	GABBA		27,104	138,000	118,000
2	Melbourne	MCG	43,197		911,000	30,000
3	Kangaroos	Telstra Dome		28,481	-	166,000
4	Geelong	Aurora Stadium	17,120		89,000	157,000
5	Western Bulldogs	MCG	31,982		95,000	166,000
6	Essendon	MCG		52,047	768,000	11,000
7	Fremantle	Subiaco		36,481	203,000	177,000
8	St. Kilda	MCG	36,063		666,000	27,000
9	West Coast	Aurora Stadium	18,112		720,000	36,000
10	Port Adelaide	AAMI Stadium		23,945	146,000	152,000
11	Sydney	MCG	48,398		213,000	169,000
12	Carlton	Telstra Dome		53,459	928,000	22,000
13	Collingwood	Telstra Dome	50,248		-	295,000
14	Adelaide	AAMI Stadium		34,733	698,000	28,000
15	Richmond	MCG	41,770		586,000	56,000
16	St. Kilda	Telstra Dome		37,847	-	142,000
17	Kangaroos	Aurora Stadium	19,114		64,000	14,000
18	Essendon	MCG	55,019		673,000	51,000
19	Brisbane Lions	MCG	39,007		148,000	158,000
20	Port Adelaide	Aurora Stadium	15,264		227,000	168,000
21	Western Bulldogs	Telstra Dome		32,734	-	150,000
22	Sydney	SCG		27,498	241,000	158,000
Wk 1 Finals	Crows	Telstra Dome	36,534		1,262,000	23,000
Wk 2 Finals	Kangaroos	MCG		74,981	1,648,000	12,000
<b>Total</b>			<b>451,828</b>	<b>429,310</b>	<b>10,424,000</b>	<b>2,486,000</b>

Chart 6: Benchmarking Hawthorn FC Television Audiences 2007 v 2006

Source: OzTam and AGB Nielsen Media Research Australia



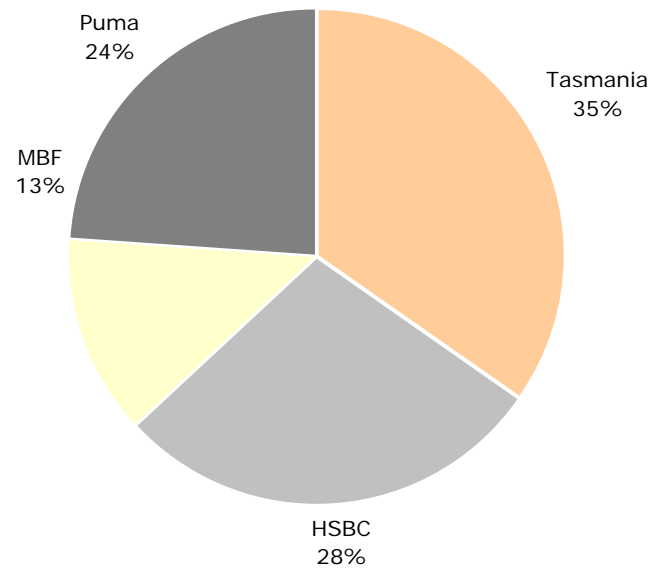
### 3.0 BENCHMARKING ANALYSIS

#### 3.1 Hawthorn FC Sponsor Exposure Benchmarking

The following table benchmarks the share of voice generated by each Hawthorn sponsor during the 2007 season:

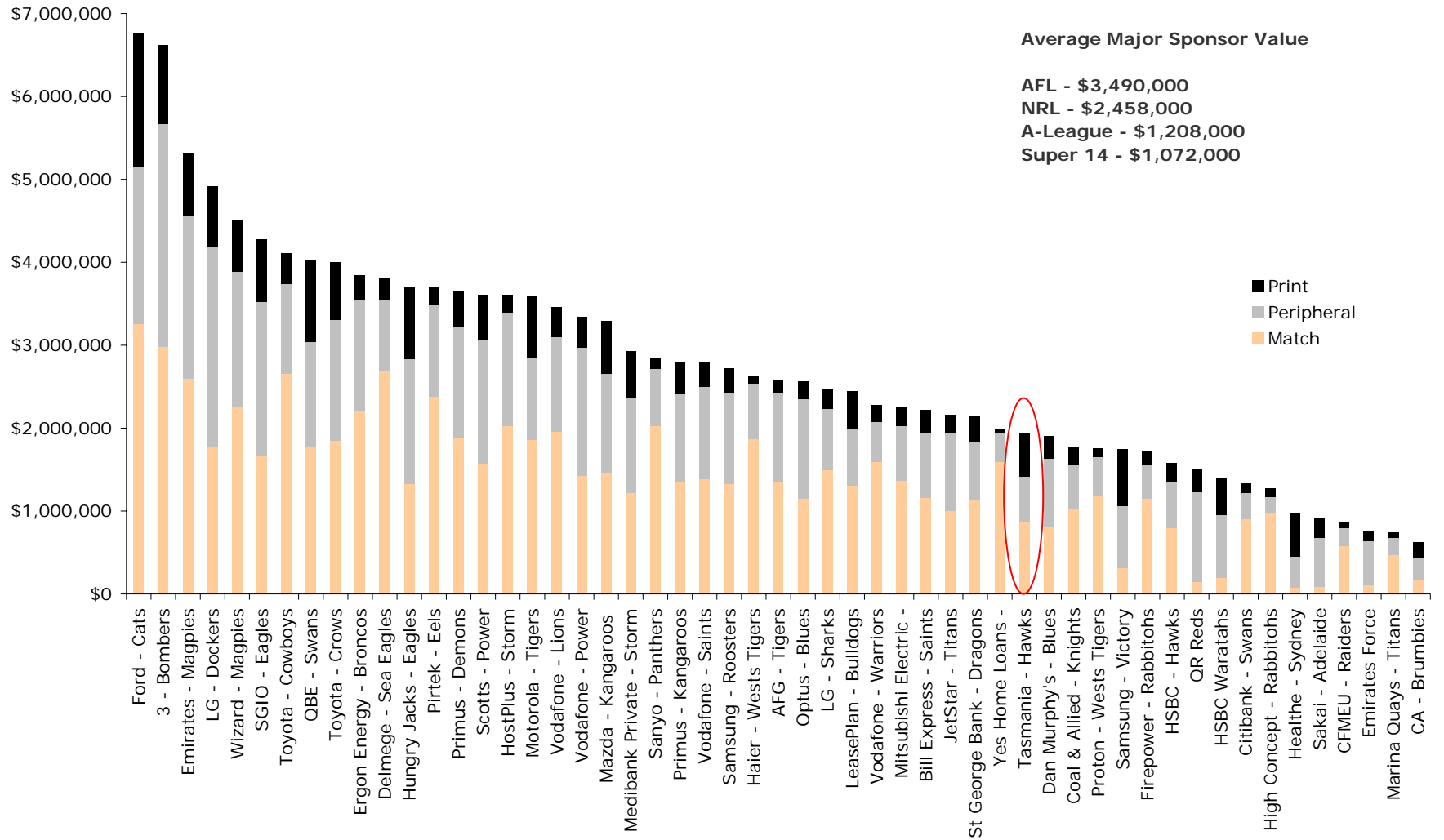
Sponsor	Match	Peripheral	Print	Total
Tasmania	\$871,095	\$549,280	\$530,168	<b>\$1,950,543</b>
HSBC	\$792,140	\$568,148	\$226,289	<b>\$1,586,577</b>
Puma	\$516,667	\$401,781	\$430,722	<b>\$1,349,170</b>
MBF	\$267,776	\$49,745	\$417,599	<b>\$735,120</b>

Chart 7: Benchmarking Hawthorn FC Share of Voice



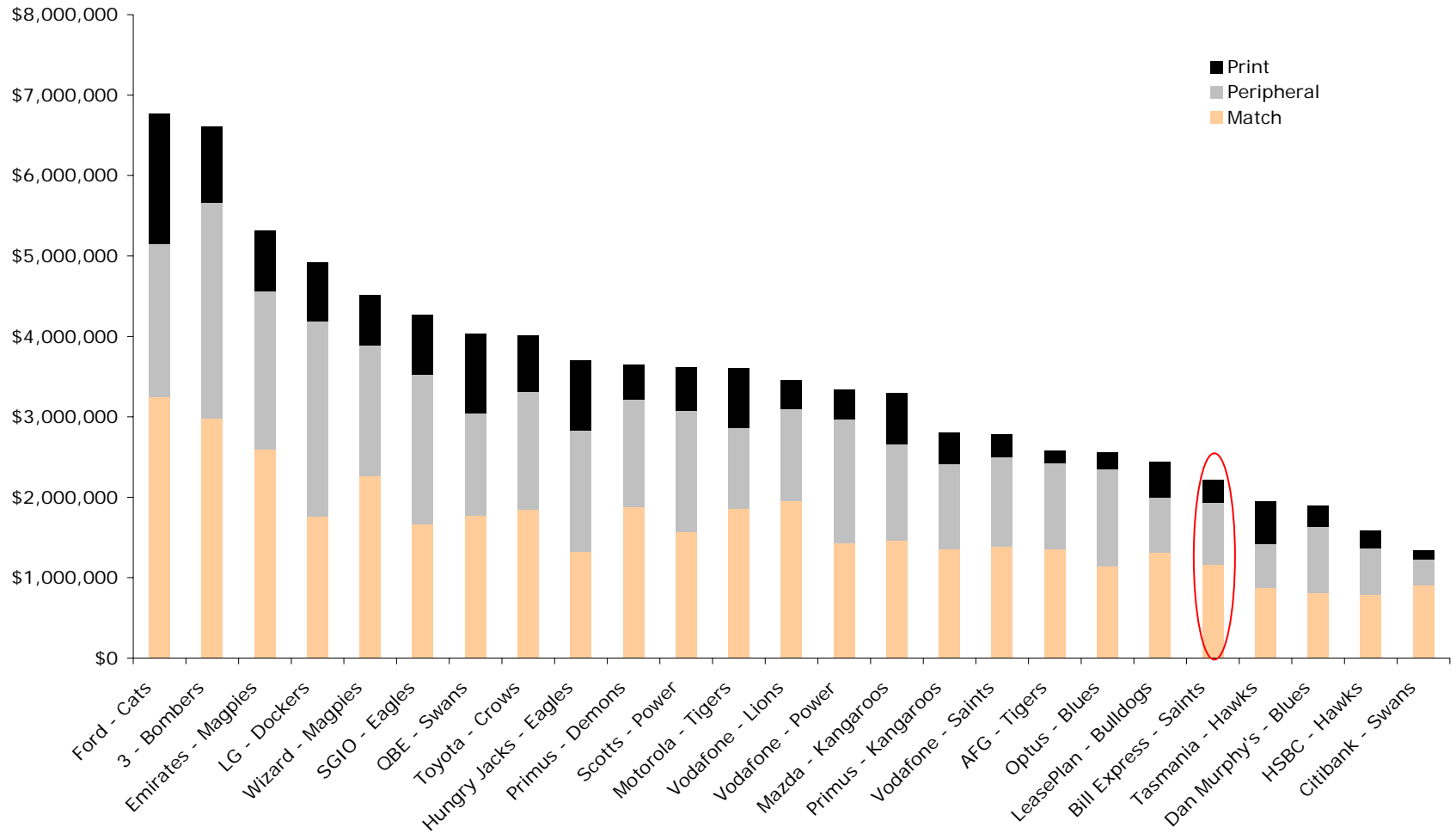
### 3.2 Benchmarking Across All Football Codes

The following chart benchmarks Tasmania Hawks exposure value, against all major AFL, NRL, A-League and S14 sponsors:



### 3.3 Benchmarking Across the AFL

The following chart benchmarks Tasmania exposure value, against all other AFL major club sponsors:



#### 4.0 GLOSSARY OF TERMS

The following table provides guidelines to Hawthorn FC sponsorship inventory mentioned throughout this report:

TERM	DESCRIPTION
Board	Fixed perimeter boards around the playing ground
Coach	Team head coach
Coaches box	Signage on the window or inside the coaches box
Dressing room	Signage within the team dressing room on match day
Fascia signage	Second of third tier signage above the field of play
Goal post pads	Padding used on posts at AFL matches
Jersey front/back	Official team match playing jersey
Media board	Backdrop used in interviews and press conferences
Mentions	Verbal mentions by commentators
Officials	Any member of the coaching or training staff other than the head coach
Polo Shirt	Official team collared shirt
Position board	Tactical whiteboard used by coaching staff
Rotating board	Scrolling signage used at the MCG or Telstra Dome
Spectators	Branding on apparel worn by spectators
Supersite	Large billboard signage at Aurora Stadium
Training apparel	Team training gear worn on match day and during other training activities

## 5.0 S-COMM METHODOLOGY

### 5.1 SpindeX2® Analysis

Television analysis is conducted using Magellan an advanced version of our sponsorship television evaluation system - **SpindeX2®**. This improved system includes automated image recognition software, Magellan to capture sponsor television exposure data, combined with the market accepted analysis and valuation methodologies unique to the **Spindex®** system. As a final layer, **S-COMM** utilises market intelligence and experience, providing insights and comments to improve and understand exposure performance.

**Spindex®** research has identified the following variables that impact on the recognition of a sponsor's brand during a sporting telecast. The four variables are:

- Exposure time
- TV audience
- Frequency of exposures
- Exposure time as a percentage of telecast duration

These variables quantify the potential brand awareness expressed as a **Spindex® Rating Point (SRP)**. Research conducted by the **S-COMM** global network determines the recall levels for each sponsorship inventory (e.g. Clothing, perimeter boards, grass advertising). These recall levels are combined with **SRPs** and Australian sponsorship market investment fees to determine the value of each sponsor's television exposure.

### 5.2 Print Media

**S-COMM** analyses major metropolitan and selected regional newspapers and a selection of sport/sponsorship specific publications for editorial and pictorial references to sponsor brands, logos & mentions.

Appropriate advertising rates and a proprietary formula are applied to the space of each article/image to determine the estimated value of each sponsor's publicity, which is then discounted based on the amount of clutter within the article/image. Published circulation figures are used to calculate the potential reach.



## Part II Consumer Research Tasmania as a Destination

Tourism Tasmania  
November 2007



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## CONTENTS

<b>1.0 BACKGROUND</b>	<b>3</b>
1.1 Methodology and Respondent Profile	4
<b>2.0 RESEARCH FINDINGS</b>	<b>5</b>
2.1 Stage One – The Property	5
2.2 Stage Two – Sponsorship Awareness	11
2.3 Stage Three – Brand Image	15
2.4 Stage Four – Consideration	17
2.5 Stage Five – Usage	21

## 1.0 BACKGROUND

**S-COMM** was commissioned by Tourism Tasmania to conduct independent consumer research into the sponsorship of the Hawthorn Football Club. Tourism Tasmania seeks to understand the impact of its Hawthorn FC sponsorship at a consumer level.

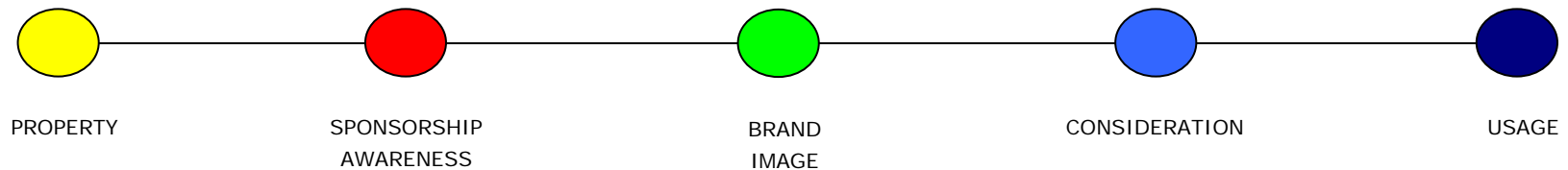
The objective of this research is to understand the impact of the sponsorship on driving awareness of Tasmania as a tourist destination. **S-COMM** has designed and implemented a program that will determine the level of awareness of the sponsorship and how that has influenced intentions surrounding travel to Tasmania.

**S-COMM** has analysed the results through a number of target groups such as Hawthorn fans/non fans and sponsor aware/unaware. This research focuses on the impact of the sponsorship on those people residing in Melbourne, home of Hawthorn FC.

This research study was conducted online amongst **600** Melbourne residents. The sample was constructed on the following mutually exclusive groups:

1. 150 respondents with no interest in AFL
2. 150 respondents with an interest in AFL whose favourite team is Hawthorn FC
3. 300 respondents with an interest in AFL whose favourite team is not Hawthorn FC

**S-COMM** has applied its sponsorship effectiveness model (below), which is highlighted at the beginning of each section to ensure that all stages, paramount to successful sponsorships, have been addressed.



## 1.1 METHODOLOGY AND RESPONDENT PROFILE

The research was conducted through on-line interviews. In total, 600 people were interviewed during a two-week period during October 2007.

The sample was targeted, using the following criteria: a) Melbourne residents

b) respondents aged 18+

c) 150 respondents with no interest in AFL

d) 150 respondents with an interest in AFL whose favourite team is Hawthorn FC

e) 300 respondents with an interest in AFL whose favourite team is not Hawthorn FC

### Profiles:

Age Groups	%
18 - 24	18%
25 - 34	17%
35 - 44	20%
45 - 54	20%
55+	25%
Total	100%

No.Children (<15) in Household	%
none	67%
1 child	15%
2 children	12%
3 children	5%
4+ children	1%
Total	100%

Employment status	%
Yes, full time	44%
Yes, part time	22%
No, retired	9%
No, student	6%
No, looking for work	2%
No, home duties	11%
No, do not work	2%
other	3%
Total	100%

Occupation	%
Professional	12%
Other Professional	15%
Manager/Business Owner	16%
Sales Person, Shop Worker	18%
Skilled or Semi-Skilled Worker	13%
Other Manual Worker	4%
Other	21%
Never been employed	1%
Total	100%

Marital Status	%
Single	35%
Have a partner (married/defacto)	65%
Total	100%

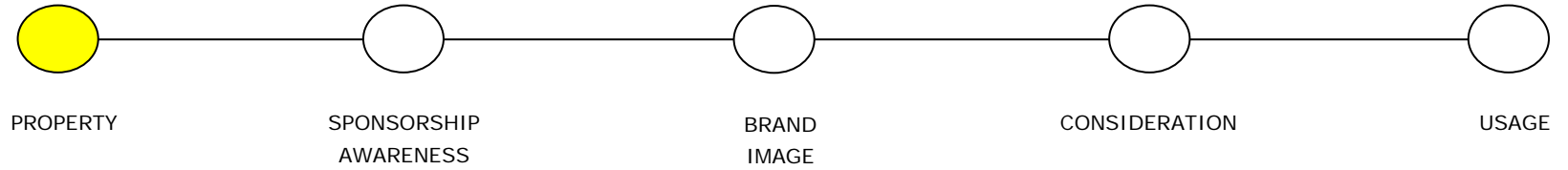
Level of Education	%
Primary school or some high / secondary school	10%
Completed TAFE / technical or tertiary college	39%
Some tertiary study	11%
Completed diploma	10%
Completed degree	17%
Higher degree/diploma	12%
Total	100%

Annual household Income	%
Under \$15,000 a year	5%
\$15,600 - \$25,999 a year	7%
\$26,000 - \$36,399 a year	8%
\$36,400 - \$51,999 a year	14%
\$52,000 - \$77,999 a year	17%
\$78,000 - \$103,999 a year	17%
\$104,000 - \$129,999 a year	9%
\$130,000 - \$149,999 a year	3%
\$150,000 or more a year	4%
Refused	16%
Total	100%

No.Incomes included in H/HId	%
1 person	36%
2 persons	46%
3 persons	10%
4 persons	5%
5 persons	3%
6+ persons	1%
Total	100%

## 2.0 RESEARCH FINDINGS

### 2.1 STAGE 1: THE PROPERTY



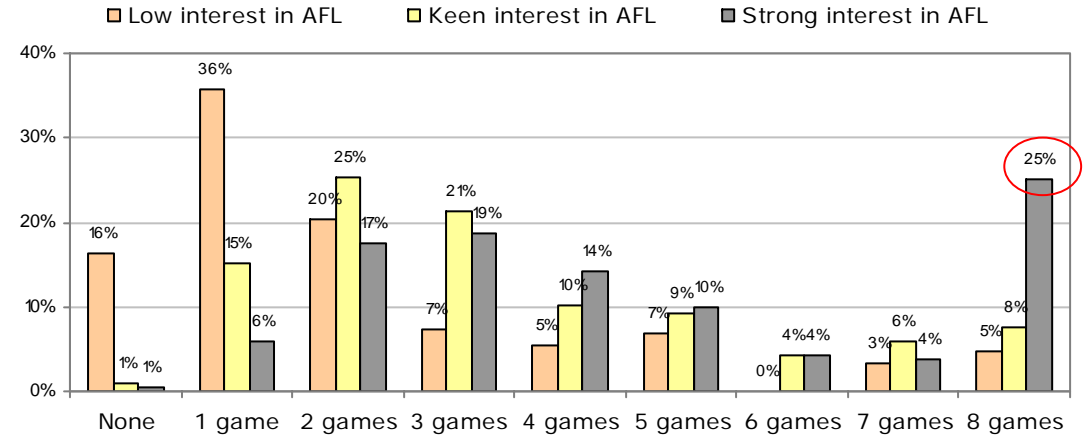
## STAGE 1: THE PROPERTY

Of the 450 respondents expressing some level of interest in AFL:

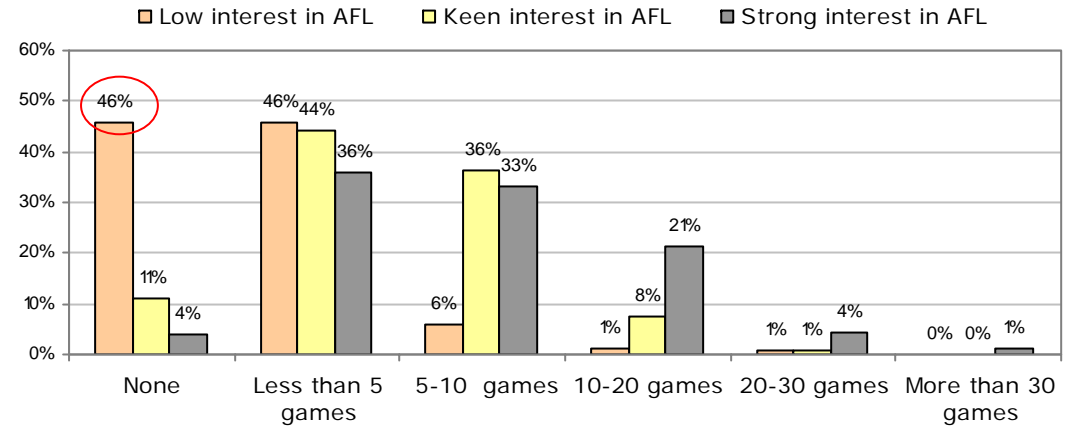
- 33% showed a low interest (1-3/5 rating)
- 26% showed a keen interest (4/5 rating)
- 41% showed a strong interest (4/5 rating)  
*(where 1=no interest, and 5=strong interest)*

The charts on the right illustrate how the level of AFL consumption (games watched on television and games attended) increases according to the level of respondents' interest in the sport code.

**Average number of games watched on television per week**



**Average number of games attended during the season**



- Q. On average, how many AFL games would you watch on television per week during a season?  
 Q. On average, how many AFL games would you attend in a season (incl. nab Cup)?

Base: AFL interest (n=450)

## STAGE 1: THE PROPERTY (cont.)

Of the 150 respondents stating Hawthorn FC as their favourite AFL team (sample quota), 23% (n=35) were members of the club. This was higher than the average across all clubs (17%).

Regardless of whether they were fans of Hawthorn FC or not, all respondents with an interest in AFL were asked to rate their level of support for Hawthorn FC:

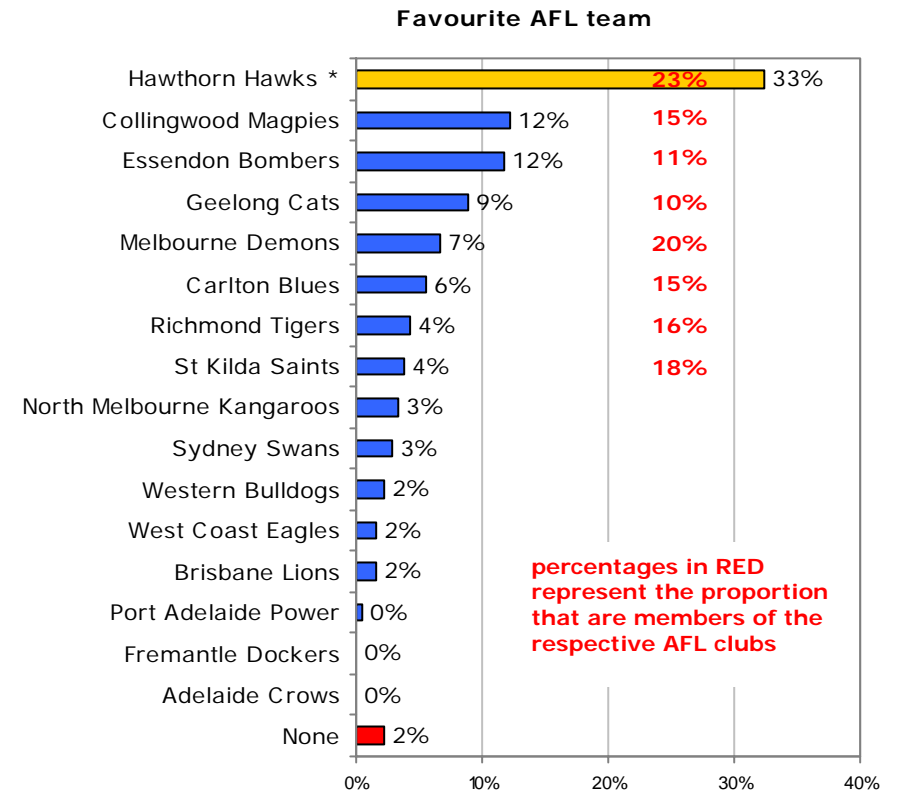
### Level of support for Hawthorn FC

	AFL interested	Hawks favourite team	other favourite team
1. No support at all	38%	-	55%
2.	19%	20%	21%
3.	21%	29%	17%
4. Keen supporter	11%	25%	4%
5. Strong supporter	9%	26%	1%
Don't Know	2%	-	2%

- 38% of AFL-interested respondents stated that they did not support Hawthorn FC at all.
- 20% were 'keen' (4/5 rating) or 'strong' (5/5) supporters of the club.
- Collingwood and Essendon were the most popular other AFL teams.
- As expected with a Melbourne sample, Victorian-based teams were favoured.
- To provide some perspective, **S-COMM's** nationally representative **SponsorLink** consumer survey shows that the Sydney Swans are the most popular AFL team in Australia, followed by the West Coast Eagles and Collingwood. The Hawthorn Hawks are ranked 10<sup>th</sup> in the **SponsorLink** study.

Q. Which ONE AFL team is your most favourite?  
Q. Are you a member of said club?

Base: AFL interest (n=450)



\* boosted sample

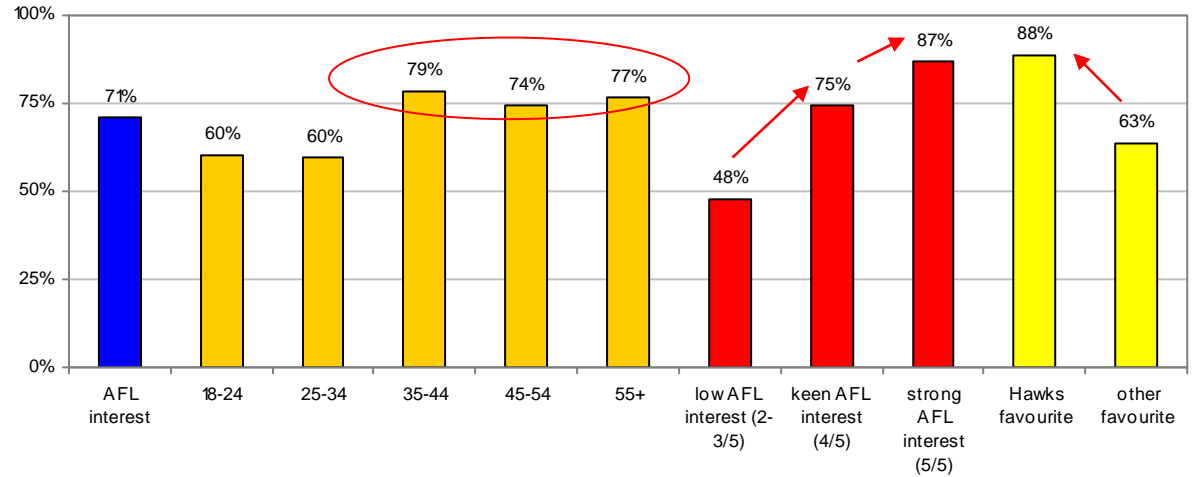
## STAGE 1: THE PROPERTY (cont.)

71% of respondents with some level of interest in AFL were aware that Hawthorn FC played several games during the 2007 AFL season at Aurora Stadium in Tasmania.

This figure rose to 88% among Hawthorn FC fans.

Awareness levels were highest among the 35+ age group.

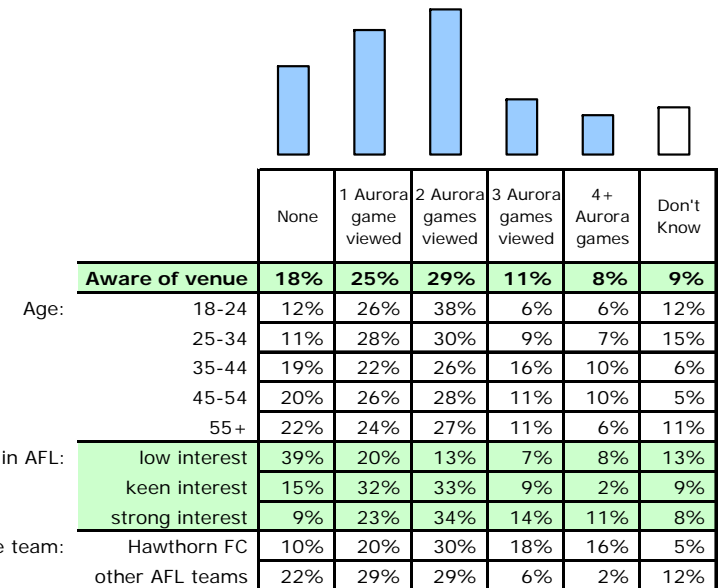
### Awareness of Hawthorn Hawks Playing Games in Tasmania



Of those aware that Hawthorn FC played several games during the 2007 AFL season at Aurora Stadium in Tasmania, approximately three-quarters had watched one or more of the games on television.

64% of Hawthorn FC fans had watched 2 or more games televised from Aurora Stadium.

88% of respondents that had watched at least one game televised from Aurora Stadium were aware, at the time of watching, that the game was being played in Tasmania.



Base: Aware that Hawthorn FC played games in Tasmania (n=318)

		None	1 Aurora game viewed	2 Aurora games viewed	3 Aurora games viewed	4+ Aurora games	Don't Know
<b>Aware of venue</b>		<b>18%</b>	<b>25%</b>	<b>29%</b>	<b>11%</b>	<b>8%</b>	<b>9%</b>
Age:	18-24	12%	26%	38%	6%	6%	12%
	25-34	11%	28%	30%	9%	7%	15%
	35-44	19%	22%	26%	16%	10%	6%
	45-54	20%	26%	28%	11%	10%	5%
	55+	22%	24%	27%	11%	6%	11%
Interest in AFL:	low interest	39%	20%	13%	7%	8%	13%
	keen interest	15%	32%	33%	9%	2%	9%
	strong interest	9%	23%	34%	14%	11%	8%
Favourite team:	Hawthorn FC	10%	20%	30%	18%	16%	5%
	other AFL teams	22%	29%	29%	6%	2%	12%

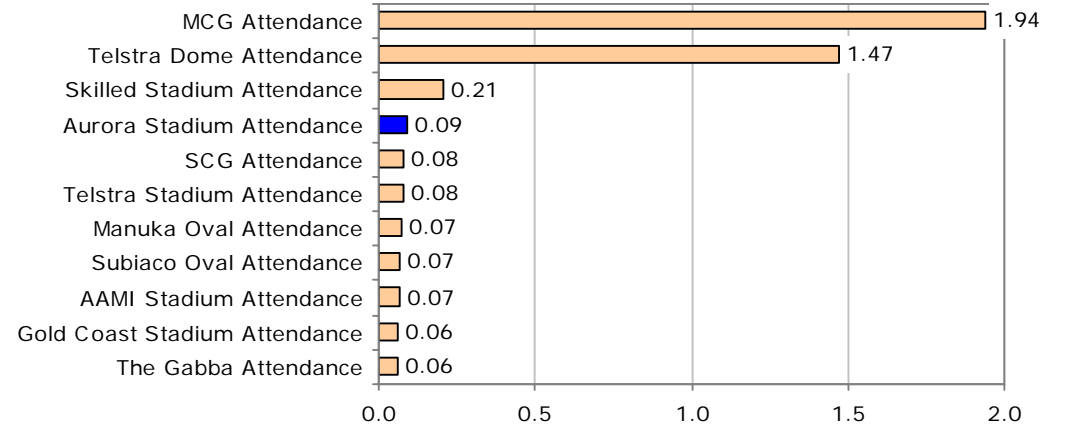
- Q. Were you aware that Hawthorn FC played several games during the 2007 AFL season at Aurora Stadium in Tasmania?
- Q. How many of these games do you think you would have watched on television (Free-To-Air or Pay TV)?
- Q. Were you aware, at the time of watching, that these games were being played in Tasmania?

### STAGE 1: THE PROPERTY (cont.)

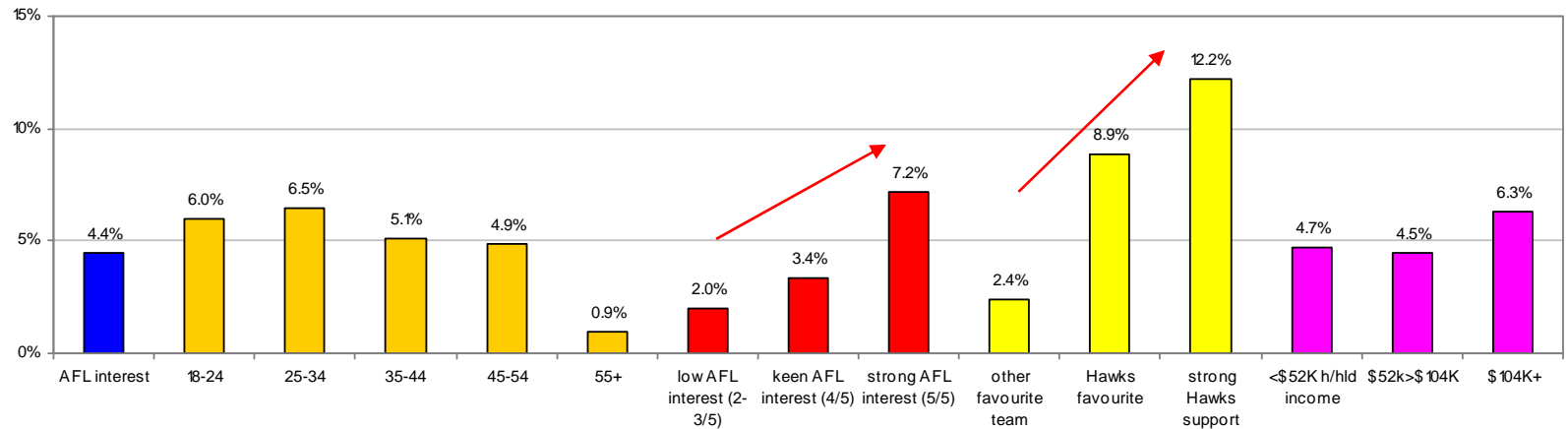
On average, respondents with an interest in AFL had visited Aurora Stadium 0.09 times during the 2007 AFL season. This level of attendance was well below that for the 3 Victorian venues, though marginally above all other venues outside of Victoria.

In percentage terms, 4.4% of AFL-interested respondents had attended Aurora Stadium in the previous 12 months. The chart below shows how the level of attendance rises among those with a strong interest in AFL and among those who are supporters of Hawthorn FC.

Average No.AFL Games attended in 2007 Season



Percentage of AFL-interested respondents that had attended One or More AFL Games at Aurora Stadium in 2007



Q. How often did you attend matches at each of the following venues this season?

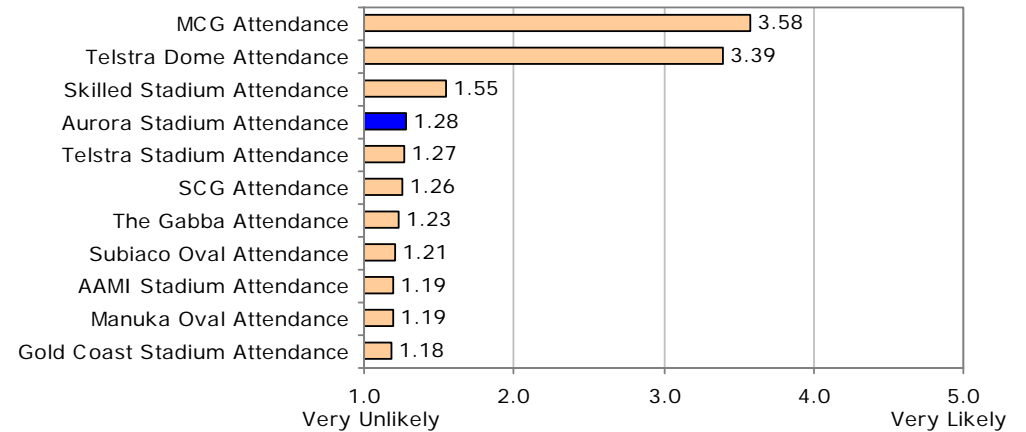
Base: AFL interest (n=450)

## STAGE 1: THE PROPERTY (cont.)

Likelihood of attending the AFL venues listed in the chart to the right closely maps the pattern of attendance for 2007.

Likelihood of attending Aurora stadium trails the 3 Victorian venues with an average rating of 1.28 (where 1=very unlikely, and 5=very likely), though leads all other interstate venues.

Likelihood of attending an AFL Game at these venues in 2008



Likelihood of attending an AFL game at Aurora in 2008

	(1) Very Unlikely	(2)	(3)	(4)	(5) Very Likely	Don't know	average rating
<b>AFL interested</b>	<b>83%</b>	<b>5%</b>	<b>4%</b>	<b>1%</b>	<b>3%</b>	<b>5%</b>	<b>1.28</b>
Age:							
18-24	81%	10%	2%	1%	4%	2%	1.33
25-34	69%	6%	9%	4%	4%	8%	1.56
35-44	81%	6%	4%	1%	4%	4%	1.35
45-54	87%	5%	2%	0%	0%	6%	1.10
55+	93%	1%	1%	0%	2%	4%	1.10
Interest in AFL:							
Low	86%	4%	2%	0%	1%	7%	1.14
Keen	89%	3%	3%	1%	3%	2%	1.21
Strong	76%	8%	5%	2%	4%	5%	1.43
other team fan	86%	4%	3%	1%	2%	5%	1.21
Hawks fan	76%	8%	5%	2%	4%	4%	1.44
strong Hawks fan	69%	10%	9%	4%	6%	2%	1.65
Hawks member	46%	9%	14%	9%	17%	6%	2.39
AFL Consumption:							
High TV	77%	5%	4%	2%	1%	11%	1.27
High attendance	70%	9%	7%	3%	6%	5%	1.58
Sponsorship:							
TAS Aware	76%	8%	7%	2%	2%	5%	1.39
TAS Unaware	87%	3%	1%	0%	3%	5%	1.20

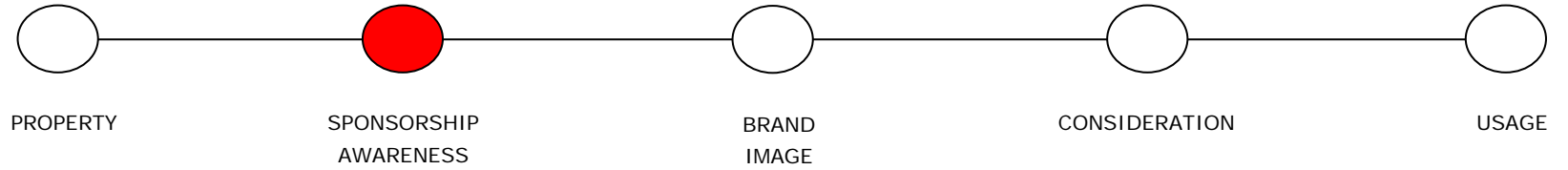
More positively, the chart to the left shows that the sponsorship is impacting on respondents with a strong interest in AFL, and especially on respondents passionate about Hawthorn FC and Hawthorn FC members.

Q. Next season, how likely will you be to attend an AFL game at these venues?

Base: AFL interested (n=450)

## 2.2 RESEARCH FINDINGS

### STAGE 2: SPONSORSHIP AWARENESS





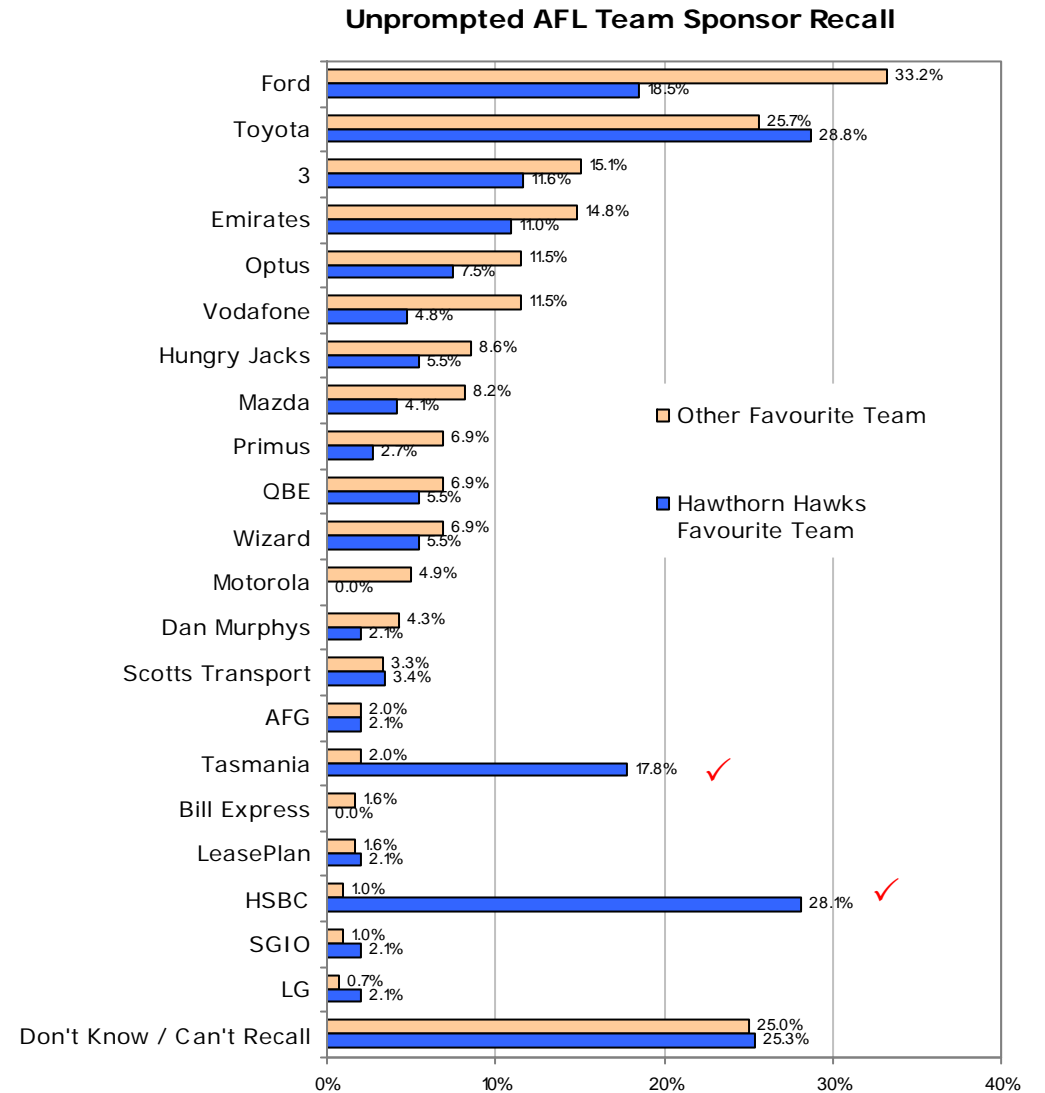
## STAGE 2: SPONSORSHIP AWARENESS

AFL-interested respondents were asked to spontaneously recall as many AFL team sponsors as they were able.

The chart to the right indicates how Tasmania sponsorship awareness levels compare to those of other AFL sponsors.

18% of Hawthorn fans recalled Tasmania as being an AFL team sponsor.

25% were unable to recall any sponsors.

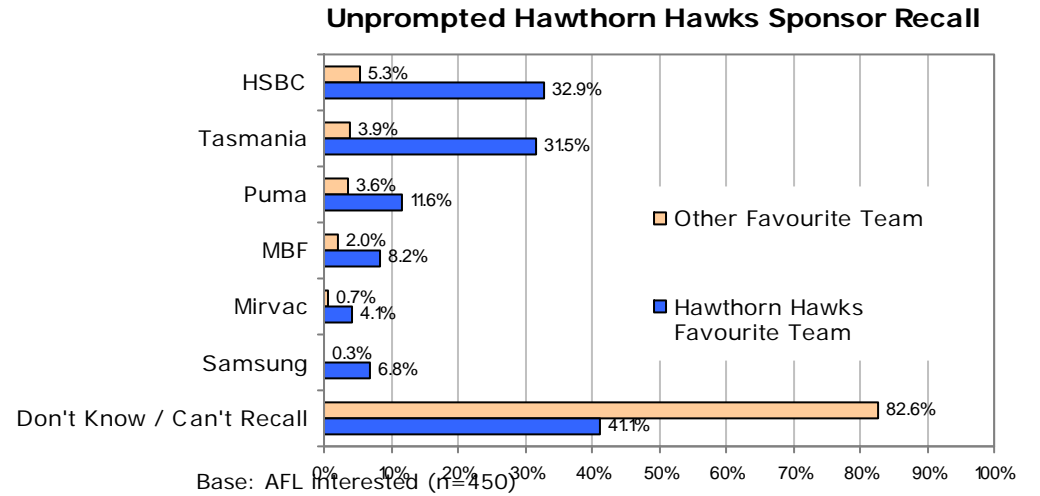


Q. Please list any sponsors you can recall of any AFL teams  
Base: AFL interest (n=450)



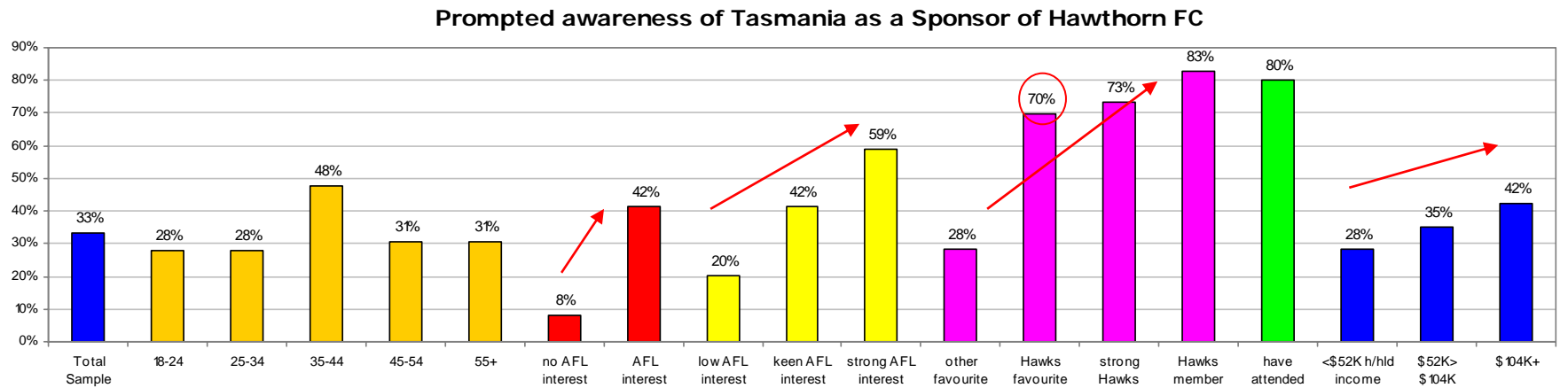
## STAGE 2: SPONSORSHIP AWARENESS (cont.)

Asked more specifically whether they could recall any sponsors of Hawthorn FC, 32% of Hawthorn fans recalled Tasmania as a sponsor. This level of recall was marginally behind other Hawthorn Hawks sponsor, HSBC (33%).



When prompted, 33% of all respondents (incl. those not interested in AFL) recognised Tasmania as a sponsor of Hawthorn FC.

This figure rose to 70% among Hawthorn fans.



Base: All respondents (n=600)

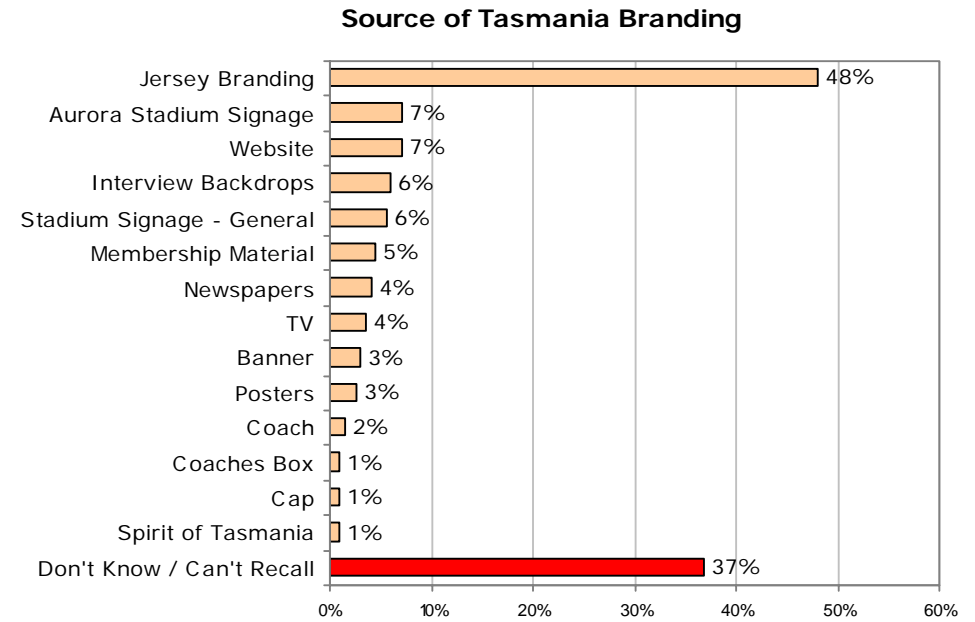
- Q. Please list any sponsors of Hawthorn FC (Hawthorn Hawks AFL team) that you can recall
- Q. Are you aware that TASMANIA is a sponsor of Hawthorn FC?



## STAGE 2: SPONSORSHIP AWARENESS (cont.)

48% of respondents aware of Tasmania's Hawthorn sponsorship were able to recall (unprompted) that they had seen Tasmania branding on the Hawthorn players' jerseys.

37% had no recollection.

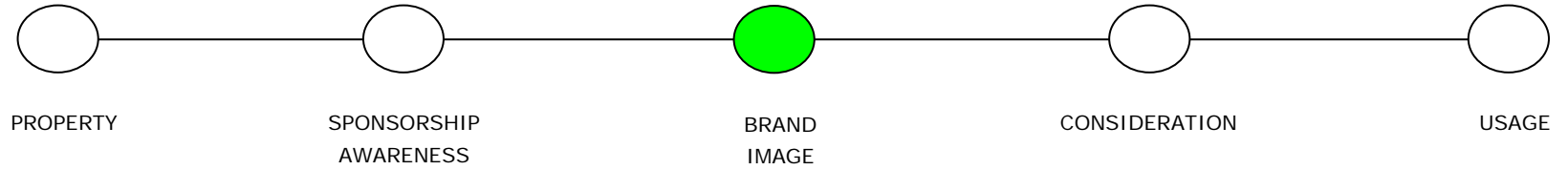


Q. Can you recall where you have seen Tasmania branding relating to the Hawthorn sponsorship?

Base: Respondents aware of Hawthorn sponsorship (n=198)

## 2.3 RESEARCH FINDINGS

### STAGE 3: BRAND IMAGE





### STAGE 3: BRAND IMAGE

Respondents were asked which of a series of statements they associate with Tasmania.

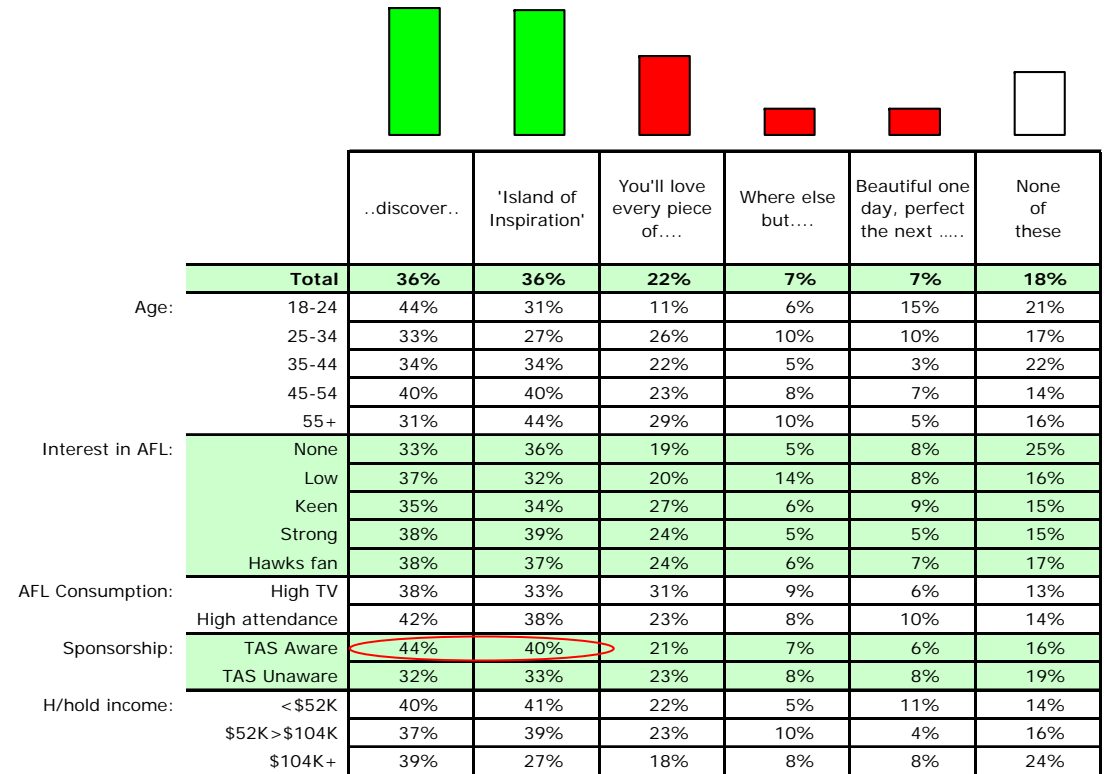
36% correctly associated the "... discover ...." slogan with Tasmania, and 36% correctly associated the "Island of Inspiration" slogan.

The chart to the right shows that respondents aware of the Hawthorn sponsorship are more likely to make a correct association than those unaware.

Also of interest is how the 18-24 age group are more familiar with the "... discover ....." slogan, while the 55+ age group are more familiar with the "Island of Inspiration" slogan.

Respondents were then asked to state any other branding statements that they might associate with Tasmania:

- 'The Apple Isle' (7% of respondents)
- 'Spirit of Tasmania' (1% of respondents)

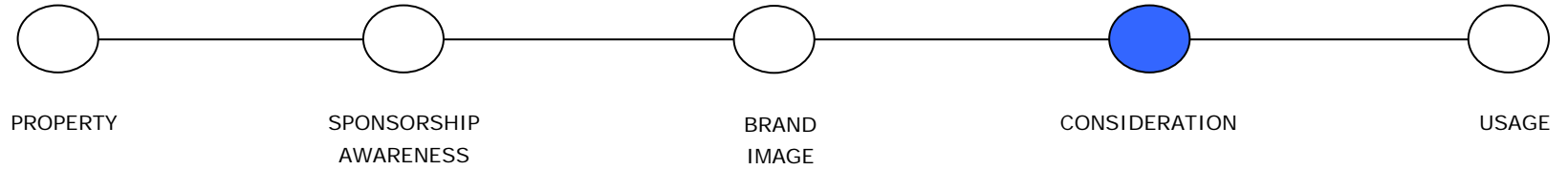


Base: All Respondents (n=600)

Note: Respondents were allowed to select more than one answer. Totals exceed 100% for this reason

## 2.4 RESEARCH FINDINGS

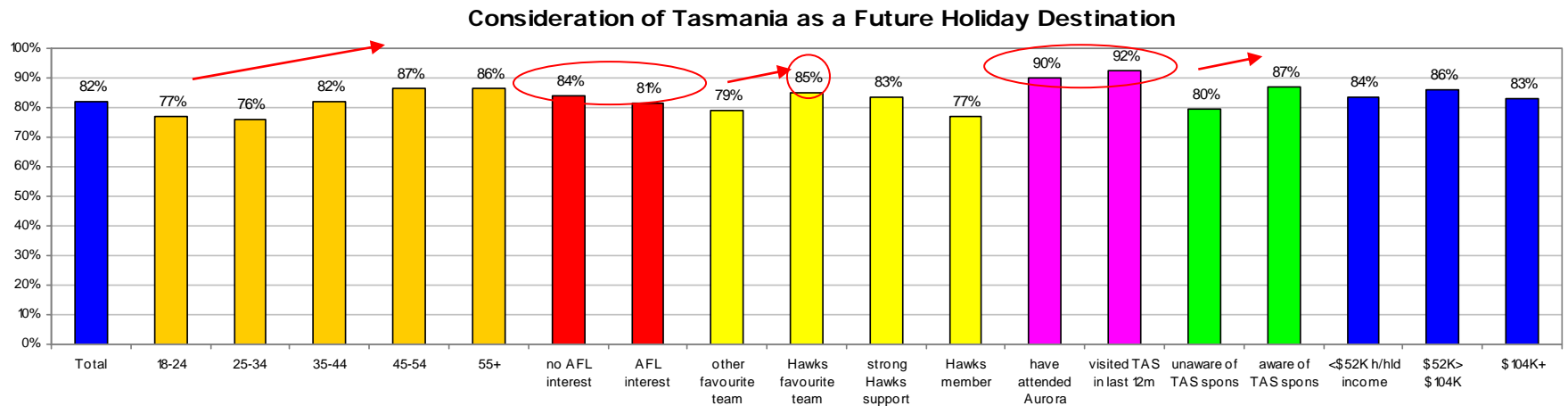
### STAGE 4: CONSIDERATION



## STAGE 4: CONSIDERATION

Asked whether they would consider Tasmania as a future holiday destination, 82% of respondents said "Yes", 7% said "No", and 11% were unsure.

The chart shows that although there is no apparent shift in level of consideration between respondents with an interest in AFL and those with no interest, Hawthorn fans are more likely to consider Tasmania as a holiday destination than fans of other AFL teams, and respondents aware of the Tasmania sponsorship are more likely to consider than those unaware of the sponsorship.



Respondents were asked about their reason for considering Tasmania as a tourist destination:

- |                                       |                        |                               |           |
|---------------------------------------|------------------------|-------------------------------|-----------|
| ▪ Scenery / Sightseeing               | 24% of all respondents | ▪ Have heard good things      | 4%        |
| ▪ Have been before and loved it       | 12%                    | ▪ Historic Place              | 3%        |
| ▪ Have not been there before          | 11%                    | ▪ Food & Wineries             | 3%        |
| ▪ Holiday (general)                   | 7%                     | ▪ <b>Hawthorn / AFL games</b> | <b>3%</b> |
| ▪ Have friends/family in Tasmania     | 7%                     | ▪ Self-drive holiday          | 3%        |
| ▪ Quiet / Peaceful / Relaxing         | 5%                     | ▪ Lakes & Fishing             | 1%        |
| ▪ To travel on the Spirit of Tasmania | 4%                     | ▪ Port Arthur                 | 1%        |
| ▪ Close to Melbourne                  | 4%                     | ▪ Cadbury Factory             | 1%        |

Q. Would you consider Tasmania as a future holiday destination?

Base: All respondents (n=600)

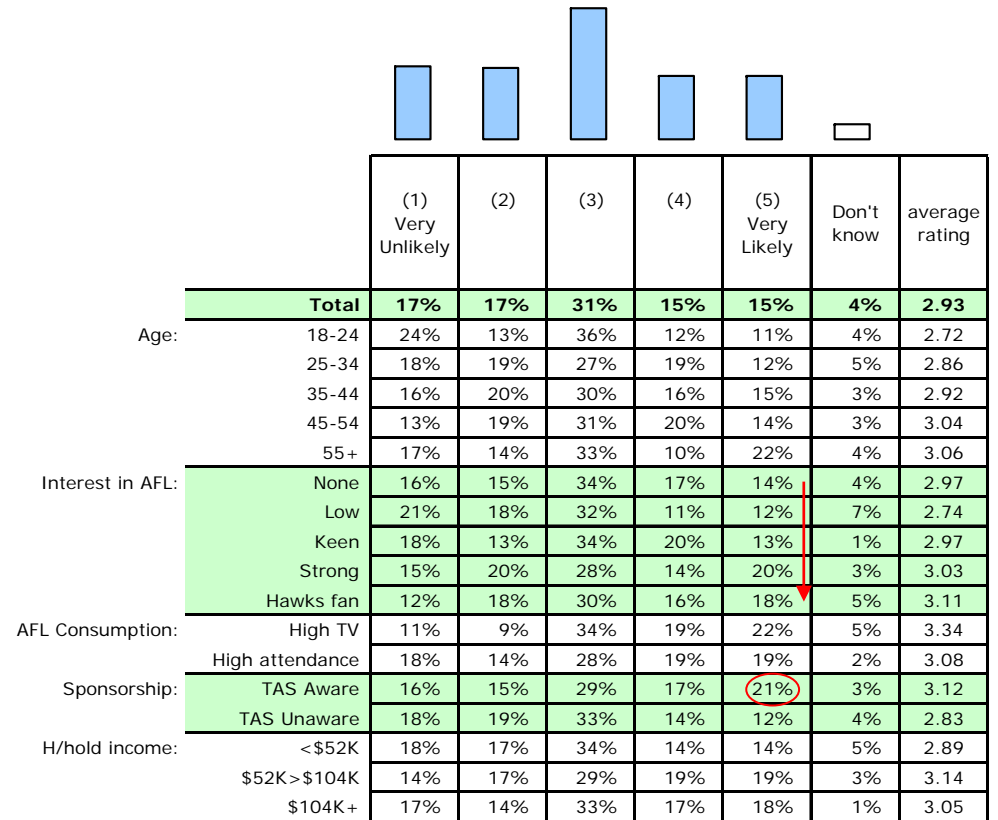


## STAGE 4: CONSIDERATION (cont.)

When asked how likely they would be to visit Tasmania in the next 12 months, 30% of respondents said they were either “likely” (15%) or “very likely” (15%) to visit the state.

Again, the chart to the right shows how likelihood of visit increases the more passionate the respondent is with regard to AFL and the Hawthorn Hawks. Those aware of the Tasmania sponsorship are also more likely to visit Tasmania than those unaware.

Another trend that is identified in the chart is inclination to visit by age. Older age groups prove to be more likely to visit Tasmania than their younger counterparts.



Q. How likely are you to visit Tasmania for a holiday in the next 12 months?

Base: All respondents (n=600)



## STAGE 4: CONSIDERATION (cont.)

Although 88% of respondents stated that the sponsorship 'had no influence' on their decision to visit Tasmania in the future, the chart to the right shows that the sponsorship has had more of a positive influence on Hawthorn fans than other respondents.

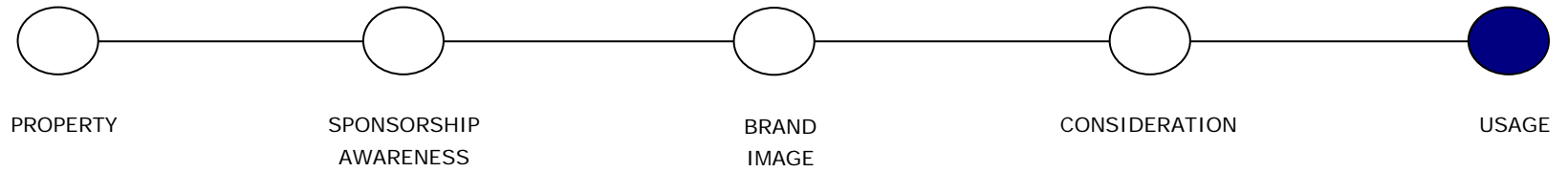
		It has had no influence	It has had some influence	It has had considerable influence
	<b>Total</b>	<b>88%</b>	<b>10%</b>	<b>2%</b>
Age:	18-24	81%	16%	3%
	25-34	88%	10%	2%
	35-44	89%	7%	3%
	45-54	87%	12%	1%
	55+	93%	7%	-
Interest in AFL:	None	97%	2%	1%
	Low	93%	6%	1%
	Keen	82%	18%	-
	Strong	81%	15%	4%
	Hawks fan	73%	25%	3%
	strong Hawks fan	64%	30%	6%
AFL Consumption:	Hawks member	66%	23%	11%
	High TV	81%	18%	1%
	High attendance	76%	20%	5%
Sponsorship:	TAS Aware	76%	21%	3%
	TAS Unaware	95%	5%	1%
H/hold income:	<\$52K	90%	9%	2%
	\$52K>\$104K	89%	11%	0%
	\$104K+	86%	12%	2%

Q. To what extent has Tasmania's sponsorship of Hawthorn FC influenced your decision to visit Tasmania in the future?

Base: All respondents (n=600)

## 2.5 RESEARCH FINDINGS

### STAGE 5: USAGE



## STAGE 5: USAGE

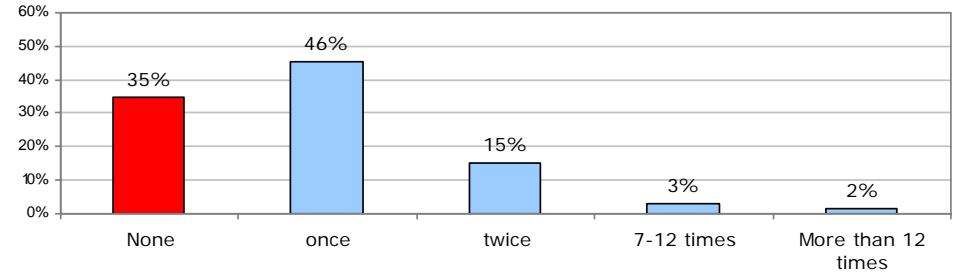
65% of respondents had traveled interstate in the previous 12 months.

NSW and Queensland were the most frequented states, and more so by AFL fans than those with no interest in AFL.

By group, Hawthorn fans were most likely to have visited Tasmania (13%).

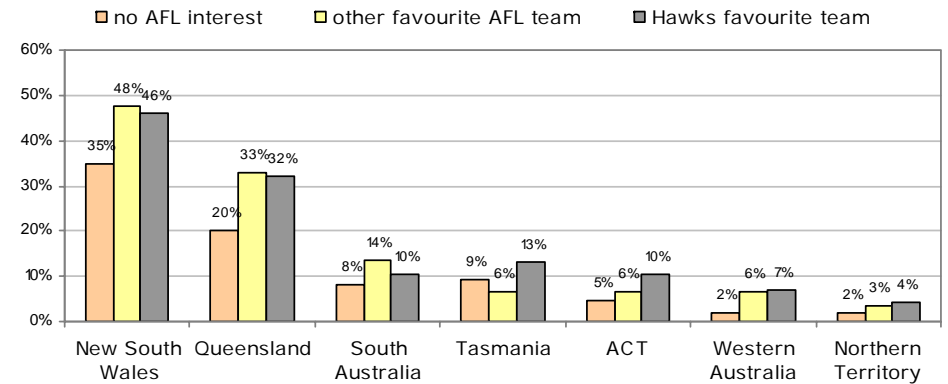
Respondents aware of Tasmania's sponsorship of Hawthorn were more likely to have visited Tasmania than those unaware. However, this was true for all states, not just Tasmania.

**Number of Times Respondents have Travelled Interstate in last 12m**

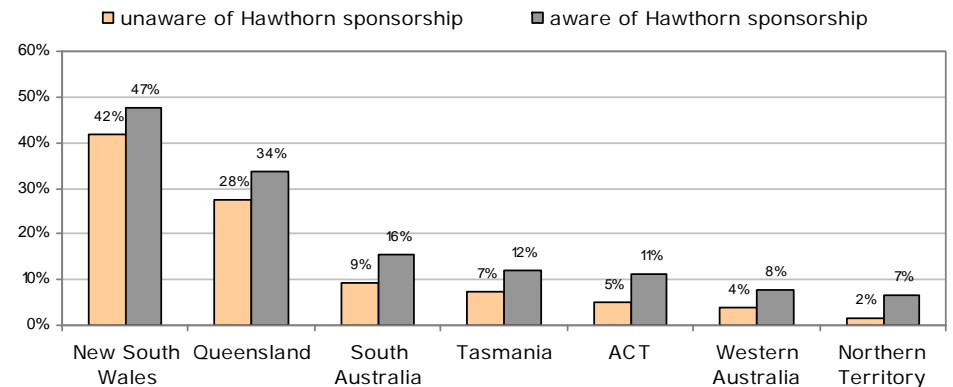


Base: All respondents (n=600)

**States Visited in Previous 12m**



**States Visited in Previous 12m**



Base: Interstate travellers (n=393)

- Q. Approximately how many times in the last 12 months have you travelled interstate?  
 Q. Which of these states and territories did you visit in the last 12 months?

## STAGE 5: USAGE (cont.)

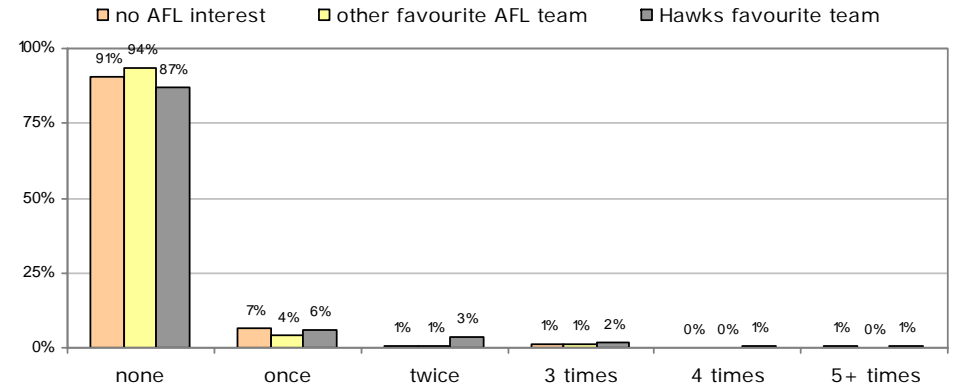
The majority of respondents that had visited Tasmania in the previous 12 months had done so only once.

Attending an AFL game was the 4<sup>th</sup> most popular reason for visiting Tasmania among all respondents who had visited Tasmania in the previous 12 months. For Hawthorn fans however, it was the number one reason.

Other reason included:

- To attend a conference/seminar 2%
- To attend a concert <1%

Number of Visits to Tasmania in Previous 12m



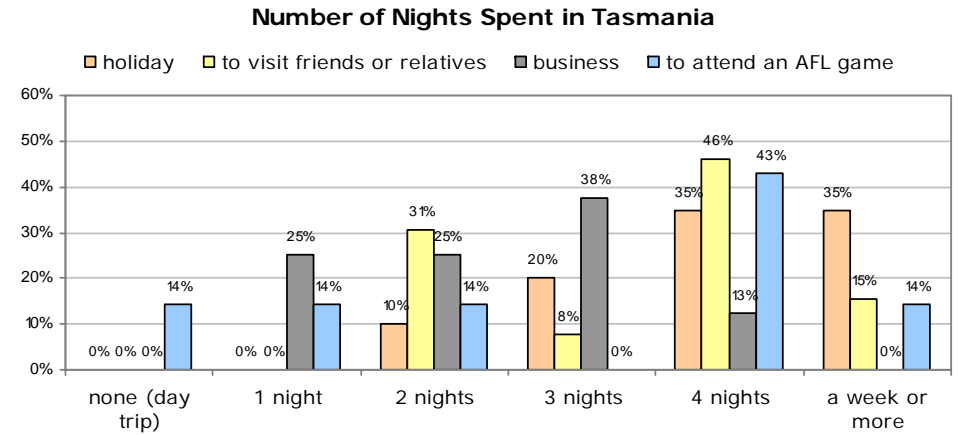
		for a holiday	to visit friends or relatives	for business	to attend an AFL game
<b>Total</b>		<b>38%</b>	<b>25%</b>	<b>15%</b>	<b>13%</b>
Age:	18-24	20%	60%	20%	-
	25-34	44%	11%	11%	22%
	35-44	15%	38%	15%	15%
	45-54	33%	33%	-	22%
	55+	59%	6%	24%	6%
Interest in AFL:	None	50%	21%	7%	-
	Low	63%	25%	13%	-
	Keen	50%	14%	29%	-
	Strong	6%	35%	12%	41%
	Hawks fan	32%	21%	11%	32%
AFL Consumption:	strong Hawks fan	23%	15%	15%	46%
	Hawks member	0%	14%	0%	71%
	High TV	22%	44%	11%	22%
Sponsorship:	High attendance	12%	28%	24%	28%
	TAS Aware	25%	25%	17%	29%
	TAS Unaware	48%	24%	14%	-

- Q. Approximately how many times did you visit Tasmania in the last 12 months?  
 Q. Thinking about your most recent trip to Tasmania, what was the main reason for that visit?

Base: Tasmania visitors (n=53)

## STAGE 5: USAGE (cont.)

Over half (57%) of respondents visiting Tasmania primarily to attend an AFL game stayed in the state for 4 nights or more.







## CONTENTS

<b>1.1 INTRODUCTION</b>	<b>3</b>
1.1 The Evaluation Framework	3
<b>2.0 Analysis of Quantitative Economic Impacts</b>	<b>4</b>
2.1 Analysis of Quantifiable Economic Impacts	4
2.1.1 Approach to Modelling of Impacts	4
2.2 Modelling of Economic Impacts of Match Sponsorship	5
2.2.1 Economic Impacts from Visitation and Visitor Expenditure	7
<b>3.0 Analysis of Socio-Economic Impacts</b>	<b>9</b>
<b>4.0 Disclaimer</b>	<b>11</b>
Appendix A – Reference List	12
Appendix B - Economic Modelling Key Assumptions and Estimates	13

## 1.0 INTRODUCTION

In 2007, the Tasmanian Government through Tourism Tasmania entered into a sponsorship agreement with the Hawthorn Football Club (HFC).

The agreement, valued at \$3 million over the five year period to 2011, incorporates two elements. The first, totalling \$1.2 million, involves the HFC playing four AFL home games and one pre-season game at Aurora Stadium in Launceston each year; and the second, valuing \$1.8 million, has resulted in Tasmania becoming the naming rights sponsor of the Club.

The Tasmanian Government has undertaken to track and evaluate the effectiveness its funding contribution at the completion of the first year of the sponsorship arrangement, particularly with regard to the social and economic benefits to the State. To this end, it has commissioned S-COMM to deliver an analysis, with the economic impact to be determined by PricewaterhouseCoopers.

This report presents the indicative findings the economic impacts resulting from the Tasmanian Government's sponsorship of the HFC during 2007. The evaluation quantifies both the direct and indirect impacts of the project to Tasmania's economy, with a specific focus on:

- The economic impacts of increased expenditure by interstate visitors drawn to the five AFL games stages in Launceston;
- The impact of employment generated by the games; and
- Qualitative Socio-economic costs and benefits including tourism development, industry and business growth; employment generation; and social and community impacts.

The economic evaluation is based on analysis of match attendance data and research delivered through the Tasmanian Visitor Survey relating to visitor travel and expenditure patterns. A reference list is contained in [Appendix A](#).

### 1.1 The Evaluation Framework

The proceeding Chapters of the report are as following:

- Chapter 3 outlines the methodology for modelling of economic impacts and assesses the quantitative outcomes;
- Chapter 4 summarises the primary socio-economic outcomes of the of the sponsorship package; and
- The remainder of the report contains the relevant disclaimer notification and appendices.

## 2.0 Analysis of Quantitative Economic Impacts

*This Chapter estimates the quantifiable economic impacts resulting from the Tasmanian Government's sponsorship of the Hawthorn Football Club during 2007.*

### 2.1 Analysis of Quantifiable Economic Impacts

The economic analysis models the direct and indirect impacts of the match component of the Tasmanian Government's sponsorship of the HFC during 2007. Specifically, it considers the economic impacts to the State of Tasmania as an outcome of visitation to Launceston by interstate visitors specifically for the HFC match games, and subsequent expenditure by such tourists.

#### 2.1.1 Approach to modelling of impacts

A standard input-output approach has been adopted to determine the economic impacts of the HFC sponsorship agreement.

In accordance with an input-output framework, the economic impact is estimated using a series of integrated multipliers which trace the relationship between the transactions of various industries in the economy. Multipliers measure the direct and flow-on effects of "shocks" to the economy, resulting from changes in demand for the output of specific sectors. They summarise, in quantitative sense, all economic responses, both direct and indirect, to a change in the economic system.

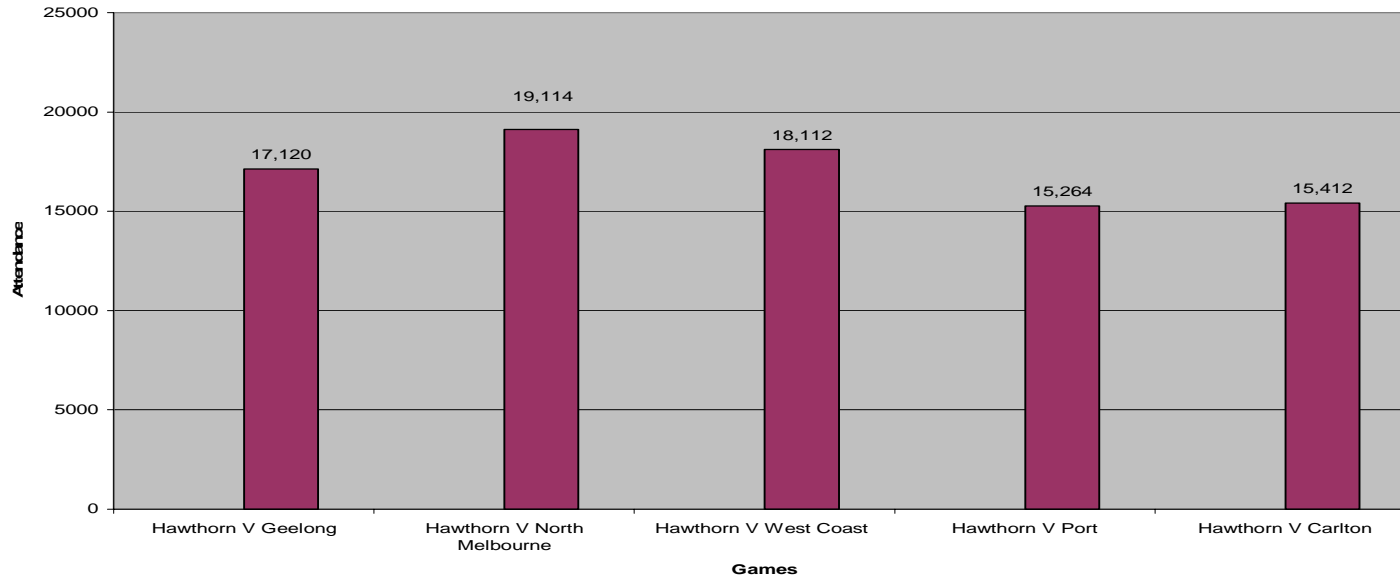
The multipliers used in the economic model are sourced from the national input-output tables produced by the Australian Bureau of Statistics (ABS). The multipliers capture both the production and consumption impacts of expenditure. Economic impacts in this instance are measured in value added terms. Value added measures the contribution that is made by the sum of wages and salaries, operating surplus (or "profit") and Government taxes and charges, to the economy.

The economic impact assessment considers the impact on the Tasmania economy only. An overview of the key results is contained in [Appendix B](#).

## 2.2 Modelling of Economic Impacts of Match Sponsorship

The one pre-season and four HFG home games played at Aurora Stadium throughout 2007 attracted more than 85,000 spectators, with per game attendance averaging 17,000. Attendance per game is summarised in Figure 2.1 following.

Figure 2.1: Attendance at HFC Tasmanian home games during 2007



Source: Events Tasmania

## Key Assumptions of Economic Model

- The key assumptions in modelling the economic impact of the Tasmanian Government's sponsorship of the HFC were established from market research relating to Tasmanian AFL match game attendance and interstate visitor travel and expenditure patterns established across the period 2003 to 2006.<sup>1</sup>
- The analysis considers the impact of expenditure by interstate visitors only, with Tasmanian based attendees omitted from consideration. Local markets are considered 'divertible visitors' as it is assumed that visitation and any associated expenditure would occur elsewhere within the State regardless of the occurrence of the AFL matches.
- The analysis applied to the game period during 2007 only.
- The percentage of attendees originating from interstate is estimated at 26.1 per cent for games involving two Victorian teams and 16.7 per cent for games involving one team from outside Victoria.
- The average length of stay in Tasmania by interstate visitors to matches that involved two Victorian clubs was three days, and 2.5 days for matches featuring one interstate team only.
- It is estimated that seventy per cent of interstate attendees visited Tasmania for the sole purpose of attending the AFL match and would not have visited otherwise. This assumes 30 per cent of interstate attendees would have visited Tasmania regardless of the game, and attended as it coincided with their trip.
- On average, interstate attendees spent \$211 per day, with this expenditure proportioned across the expenditure categories as following: accommodation and food and beverages: 40% respectively; and match tickets and retail purchases, 10 per cent respectively.

---

<sup>1</sup> Events Tasmania market research and Tasmania Visitor Survey

### 2.2.1 Economic impacts from visitation and visitor expenditure

Three outcomes have been modelled by the input-output analysis in relation to the economic impacts of Tourism Tasmania's sponsorship of the Hawthorn Football club during 2007. These are:

1. The total output multiplier, which provides a measure of the total economic activity created directly and indirectly from the Tasmanian based matches.

**The result of the modelling is that the economic output resulting from spending by interstate visitors to the Tasmanian AFL games was approximately \$15.16 million during 2007.** This is based on a direct economic impact of \$8.07 million and flow on impacts of \$7.09 million.

During this period, spending on accommodation and food and beverages produced a direct economic impact of \$6.45 million and an indirect impact of more than \$6.09 million. Retail sales generated \$806,543 in direct economic effect and \$700,886 in indirect impacts. Expenditure on game tickets generated valued at \$806,543 which produced flow on effects of \$300,034.

2. A value added multiplier, which provides a measure of the net increase in the economic activity resulting directly and indirectly in response to the demand from the games (i.e. the increase in economic activity less the cost of inputs).

**The result of the analysis is that expenditure by interstate visitors to the HFC Tasmanian home games provided approximately \$7.27 million of value add to the State during 2007.** Of this, more than \$3.92 million was as a direct impact and \$3.34 million occurred as an indirect effect.

Expenditure on accommodation, food and beverages produced close to \$5.77 million in value add (\$2.92 million directly and \$2.85 million indirectly) and expenditure on retail items generated value add of \$739,600 (\$395,206 directly and \$344,394 million indirectly). Spending on tickets generated a total value add of \$761,376; \$615,392 resulting from direct spending, and \$145,984 resulting from flow on impacts.

3. The employment multiplier, which relates to the additional employment generated from an event or activity. The employment multiplier used in this analysis calculates additional full time equivalent (FTE) positions generated by the games.

**The results of the modelling are that the interstate tourism and tourism expenditure resulting from the 2007 HFC Tasmanian home games created 110 full time equivalent positions in the State.**

This comprised 85 jobs as a flow on spending on accommodation, food and beverages by interstate international visitors, 15 jobs as an outcome of retail expenditure and around 9 jobs resulting from purchases of match tickets.

The results are summarised in Table 2.1 following.

Table 2.1: Economic impact generated from HFC Tasmanian home games during 2007

Measure	Direct Effects	Flow-on Effects	Total Impact
<u>Output (\$A)</u>			
Accommodation, cafes and restaurants	6,452,342	6,097,463	\$12,549,806
Tickets	806,543	300,034	\$1,106,577
Retail trade	806,543	700,886	\$1,507,428
<b>Total output (\$A)</b>	<b>\$8,065,428</b>	<b>\$7,098,383</b>	<b>\$15,163,811</b>
<u>Value Added (\$A)</u>			
Accommodation, cafes and restaurants	2,916,459	2,851,935	\$5,768,394
Tickets	615,392	145,984	\$761,376
Retail trade	395,206	344,394	\$739,600
<b>Total Value Add (\$A)</b>	<b>\$3,927,057</b>	<b>\$3,342,313</b>	<b>\$7,269,370</b>
<u>Employment (FTE)</u>			
Accommodation, cafes and restaurants	55	30	85
Tickets	8	1	9
Retail trade	11	4	15
<b>Total employment (FTE)</b>	<b>75</b>	<b>35</b>	<b>110</b>

### 3.0 Analysis of Socio-Economic Impacts

*This Chapter presents the findings of an examination of the broad range of qualitative costs and benefits resulting from the Tasmanian Government's sponsorship of the Hawthorn Football Club. While the analysis identifies the impacts occurring in 2007, it does acknowledge that some benefits may accrue over the longer term.*

The main themes of the analysis relate to tourism, industry and business growth and development; employment generation; and social and community impacts. The key findings are summarised in Table 3.1 following.

Table 3.1: Socio-economic Impacts resulting from Tourism Tasmania Sponsorship of the Hawthorn Football Club

Impacts
<p><b><i>Tourism Growth and Development</i></b></p> <p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Increased depth and diversity of local tourism product, enhancing the attractiveness and appeal of Launceston and Tasmania to new visitor markets; the attraction of tourists who are likely to have a greater inclination to visit again.</li> <li>• Promotion / exposure of Tasmania and Tasmanian tourism product obtained through television broadcasts nationally (match coverage and peripheral coverage), website coverage and print media; Opportunities to leverage growth in visitation from intrastate, interstate, and to some extent, overseas visitors (largely as a value add to a current trip), from greater awareness generated through the sponsorship arrangements.</li> <li>• Enhancement of the Tasmanian Government's strategic directions for tourism growth as defined in <i>Tourism 21: A New 10-Year Vision</i>, including increased visitor expenditure, new job creation, infrastructure development, product development, community integration and environmental sustainability.</li> <li>• Similarly, support of the Events Tasmania <i>Strategic Plan 2006-2010</i> through growth in the events calendar, as well as obtainment of Tourism Tasmania's strategic priorities for tourism branding and State marketing as outlined in its <i>Three-Year Business Strategy 2006-2009</i>.</li> <li>• Tourism generated in generally non-peak periods.</li> </ul> <p><b>Costs</b></p> <ul style="list-style-type: none"> <li>• Significant annual investment of tax payer funds – outcomes of sponsorship unexplored against other marketing and communications initiatives and options.</li> </ul>
<p><b><i>Industry and Business Generation</i></b></p> <p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Increased use of local facility – Aurora Stadium.</li> <li>• Procurement/acquisition of domestic/local services, inputs and materials for game/match operations. Eg: food, beverage and retail supplies, etc</li> <li>• Growth in demand for local tourism and retail products and services, ie: accommodation and transport providers, and visitation spill over effects to</li> </ul>

Impacts
<p>other local and regionally based attractions and services.</p> <ul style="list-style-type: none"> <li>• Potential long term growth in secondary tourism market, such as tourism wholesalers, tourism operators, transport providers, etc</li> </ul> <p><b>Costs / Risks</b></p> <ul style="list-style-type: none"> <li>• Interstate or off-shore providers and suppliers of goods and services may limit local/State economic impacts.</li> <li>• Lag effect in creation and growth of supporting services and infrastructure.</li> </ul>
<p><b><i>Employment Impacts</i></b></p>
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Generation of locally based employment for both skilled and unskilled labour on both match days and for pre- and post-match coordination.</li> <li>• Indirect employment outcomes as a result of enhanced local economic conditions and to support increased tourism.</li> <li>• Development of skills amongst event organisers, service teams and suppliers.</li> <li>• Longer term, by spreading the seasonality of tourism across the region (ie: increased tourism during non-peak periods) the distribution the flow of money into the region will be evened, increasing the opportunities for year-round employment.</li> </ul> <p><b>Costs</b></p> <ul style="list-style-type: none"> <li>• In the short term, the nature of employment could be seasonal, largely in response to match events.</li> </ul>
<p><b><i>Social and Community Impacts</i></b></p>
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Greater exposure to elite level sport by local residents/youth</li> <li>• Long term potential impact on rates of sport/physical activity participation; greater support for and participation in local football clubs (Australian Rules).</li> <li>• Sense of community pride and optimism.</li> </ul> <p><b>Costs</b></p> <ul style="list-style-type: none"> <li>• Noise, pollution and traffic congestion during match days.</li> </ul>

#### 4.0 Disclaimer

This report was prepared by PwC for **S-COMM** for the sole purpose of providing an indicative estimation of the economic impacts resulting from the Tasmanian Government's sponsorship of the Hawthorn Football Club.

This report is not intended to be utilised or relied upon by any organisation, or its employees, other than the **S-COMM** and the Tasmanian Government nor is it to be used for any purpose other than that articulated above. Accordingly, PwC accepts no responsibility in any way whatsoever for the use of this report by any other persons or for any other purpose.

This report has been prepared based on desktop review of relevant data and information provided by the Tasmanian Government. It should not be construed that PwC has carried out any form of audit or other verification of the adequacy, completeness, mathematical accuracy, or reasonableness of the information on which our review have been based. While the statements made in this report are given in good faith, PwC accepts no responsibility for any errors in the information on which they are based, nor the effect of any such errors on our comments.

The information contained in this report is subject to copyright and must not be used or reproduced either in full, part or summary without the prior written approval of PwC.

## Appendix A - Reference List

Aurora Stadium; [www.aurorastadium.com](http://www.aurorastadium.com)

Events Tasmania; *Strategic Plan 2006-2010*

Hawthorn Football Club; [www.hawthornfc.com.au](http://www.hawthornfc.com.au)

Tasmanian Visitor Survey Results June 2007; from [www.tourismtasmania.com.au](http://www.tourismtasmania.com.au)

Tourism Tasmania; *Tourism 21: A New 10 Year Vision*; from [www.tourismtasmania.com.au](http://www.tourismtasmania.com.au)  
*Marketing Partnership Report Mid-year 2007*

## Appendix B – Economic Modelling Key Assumptions and Estimates

### Current Attendance

Proportion who went to tassie solely for foot	70%
Proportion of money spent on Accomodation	40%
Domestic food and beverage	40%
Tickets	10%
Retail trade	10%

#### 2003-2006 matches, attendance and spending - actual

	Attendance	Sample size	% interstate	Interstate attendance	Number just for game	Spend per person	Average nights
2003 Hawthorn V Fremantle	15,200	485	17.10%	2,599	1,819	\$194	3.0
2003 Western Bulldogs V St Kilda	13,639	669	25.71%	3,507	2,455	\$194	3.0
2004 St Kilda V Port	17,223	602	17.93%	3,088	2,162	\$210	2.5
2005 St Kilda V Port	15,400	501	15.80%	2,433	1,703	\$199	2.5
2006 Richmond V Hawthorn	18,971	436	26.38%	5,005	3,503	\$258	3.0

#### 2007 matches, attendance (actual) and spending estimate

	Attendance	Sample size	% interstate	Interstate attendance	Number just for game	Spend per person	Average nights
2007 Hawthorn V Geelong	17,120	539	26.10%	4,468	3,128	\$211	3.0
2007 Hawthorn V North Melbourne	19,114	539	26.10%	4,989	3,492	\$211	3.0
2007 Hawthorn V WC	18,112	539	16.98%	3,075	2,153	\$211	2.5
2007 Hawthorn V Port	15,264	539	16.98%	2,592	1,814	\$211	2.5
2007 Hawthorn V Carlton	15,412	539	26.10%	4,022	2,816	\$211	3.0

	Attendance	Interstate attendance	Percentage attended	Average spend	Assumption nights stayed
Two Vic teams	32,610	8,511	26.10%	\$211	3.0
One interstate team	47,823	8,120	16.98%	\$211	2.5

## Additional Spending

<b>Interstate visitors income</b>	
Hawthorn V Geelong	\$1,979,896
Hawthorn V North Melbourne	\$2,210,498
Hawthorn V WC	\$1,135,617
Hawthorn V Port	\$957,049
Hawthorn V Carlton	\$1,782,369
<b>Total income from football</b>	<b>\$8,065,428</b>

<b>Spending split on income</b>	
Accommodation	\$3,226,171
Domestic food and beverage	\$3,226,171
Tickets	\$806,543
Retail trade	\$806,543
<b>Total</b>	<b>\$8,065,428</b>

### Direct income generated from interstate attendees

2007 matches	Total Attendance	Interstate attendance	Football generated attendance	Average spend per day	Total impact
Hawthorn V Geelong	17,120	4,468	3,128	\$211	\$1,979,896
Hawthorn V North Melbourne	19,114	4,989	3,492	\$211	\$2,210,498
Hawthorn V WC	18,112	3,075	2,153	\$211	\$1,135,617
Hawthorn V Port	15,264	2,592	1,814	\$211	\$957,049
Hawthorn V Carlton	15,412	4,022	2,816	\$211	\$1,782,369
<b>Total</b>	<b>85,022</b>	<b>19,147</b>	<b>13,403</b>		<b>\$8,065,428</b>

Calculation of economic impact through application of multipliers

CALCULATION	Direct Multipliers			Indirect Multipliers			Total Multipliers			Direct Effects			Indirect Effects			Total Effects		
	Jobs	Output	Value Added	Jobs	Output	Value Added	Jobs	Output	Value Added	Jobs	Output	Value Added	Jobs	Output	Value Added	Jobs	Output	Value Added
Spend	Jobs	Output	Value Added	Jobs	Output	Value Added	Jobs	Output	Value Added	FTE	(\$'000)	(\$'000)	FTE	(\$'000)	(\$'000)	FTE	(\$'000)	(\$'000)
Accommodation	8.57	1.00	0.45	4.67	0.95	0.44	13.24	1.95	0.89	28	3,226,171	1,458,229	15	3,048,732	1,425,968	43	6,274,903	2,884,197
Domestic food and beverage	8.57	1.00	0.45	4.67	0.95	0.44	13.24	1.95	0.89	28	3,226,171	1,458,229	15	3,048,732	1,425,968	43	6,274,903	2,884,197
Tickets	10.13	1.00	0.76	1.56	0.37	0.18	11.69	1.37	0.94	8	806,543	615,392	1	300,034	145,984	9	1,106,577	761,376
Retail trade	14.02	1.00	0.49	4.67	0.87	0.43	18.70	1.87	0.92	11	806,543	395,206	4	700,886	344,394	15	1,507,428	739,600
<b>Total</b>										<b>75</b>	<b>8,065,428</b>	<b>3,927,057</b>	<b>35</b>	<b>7,098,383</b>	<b>3,342,313</b>	<b>110</b>	<b>15,163,811</b>	<b>7,269,370</b>