

Repucom Exposure Analysis

Part I – Media Exposure Branding and Share of Voice Analysis

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1.0 Executive Summary

1.1 Introduction

Repucom was commissioned by Tourism Tasmania to conduct an independent evaluation of the television and print media exposure generated through their naming rights sponsorship of the Hawthorn Football Club.

Repucom 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 **Repucom** analysed:

- Match broadcasts – Channel Seven, Channel Ten and Fox Sports coverage
- Peripheral television coverage – associated television news & sports interest programs
- Print media – all major metropolitan newspapers & sports related magazines.

The following report includes analysis of all television and print coverage throughout the period **1st February – 30th September 2008**, including:

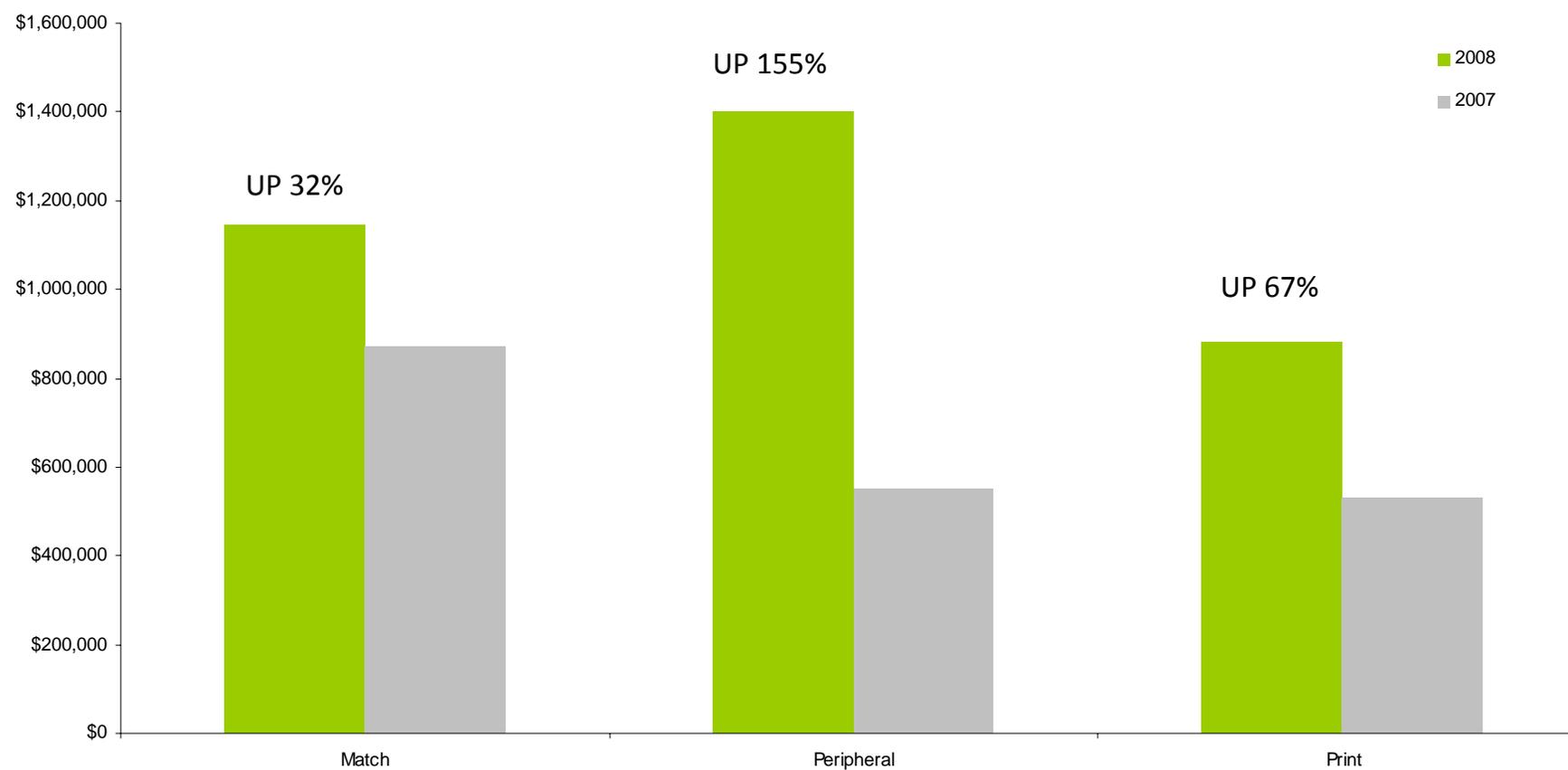
- 2008 nab Cup
- 2008 AFL Premiership Rounds 1 – 22
- 2008 Finals Series

1.2 Tourism Tasmania Total Media Exposure Value

The total media exposure generated by Tourism Tasmania, comparative with 2007 results was:

Season	Match	Peripheral	Print	Total
2008	\$1,146,295	\$1,400,584	\$882,863	\$3,429,742
2007	\$871,095	\$549,280	\$530,168	\$1,950,543

Chart 1: Benchmarking Total Exposure Value



2.0 Media Exposure Analysis

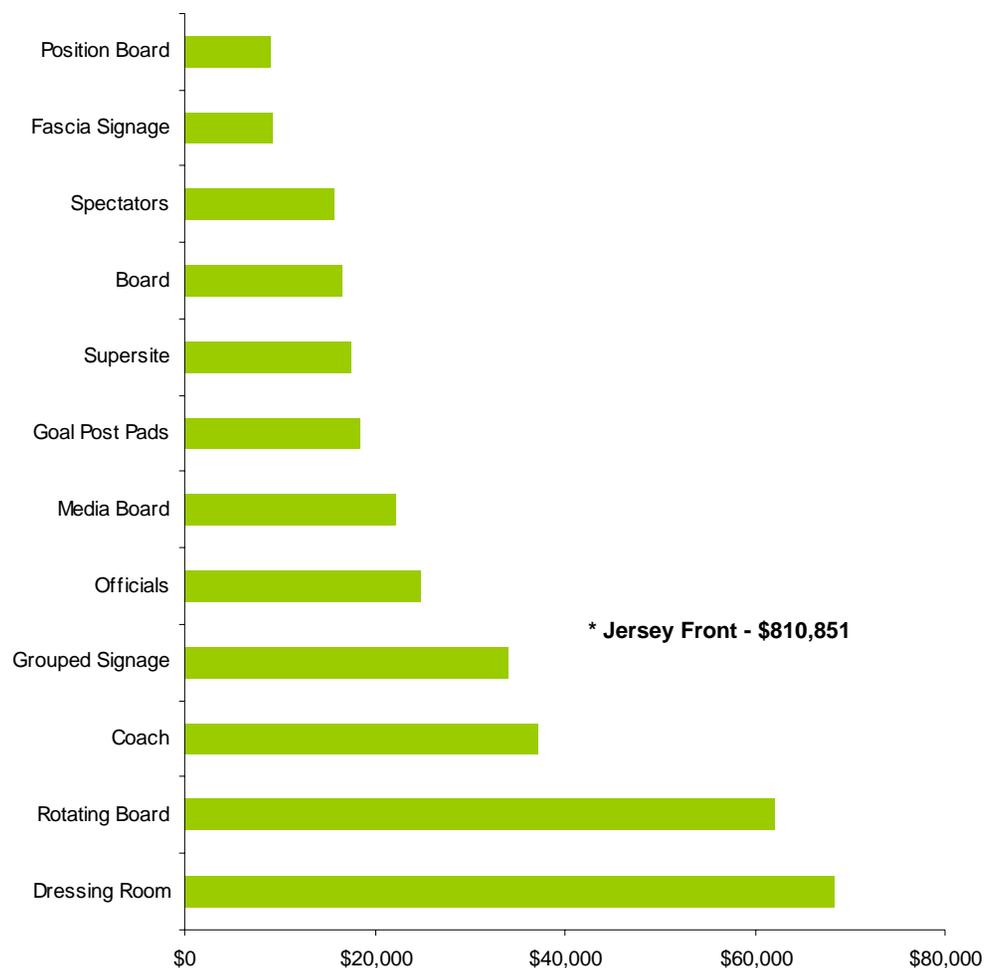
2.1.1 Tourism Tasmania – Television Match Exposure

Repucom match coverage analysis incorporates:

- Free-to-air (FTA) match broadcasts
- Fox Sports match broadcasts

Inventory	Exposure Time (Hr:Min:Sec)	Spindex® Rating Point (SRP)	Value (\$)
Jersey Front	1:47:39	2017	\$810,851
Dressing Room	0:10:53	339.6	\$68,287
Rotating Board	0:24:44	308.3	\$61,978
Coach	0:01:48	92.4	\$37,169
Grouped Signage	0:26:29	170.1	\$34,160
Officials	0:01:39	61.7	\$24,782
Media Board	0:04:46	110.7	\$22,248
Goal Post Pads	0:07:43	138.8	\$18,584
Supersite	0:07:46	88	\$17,627
Board	0:44:33	247.1	\$16,554
Spectators	0:00:41	39.3	\$15,806
Fascia Signage	0:06:13	137.3	\$9,201
Position Board	0:01:14	67.6	\$9,048
TOTAL	4:06:08	3817.9	\$1,146,295

Chart 2: Match Exposure by Inventory



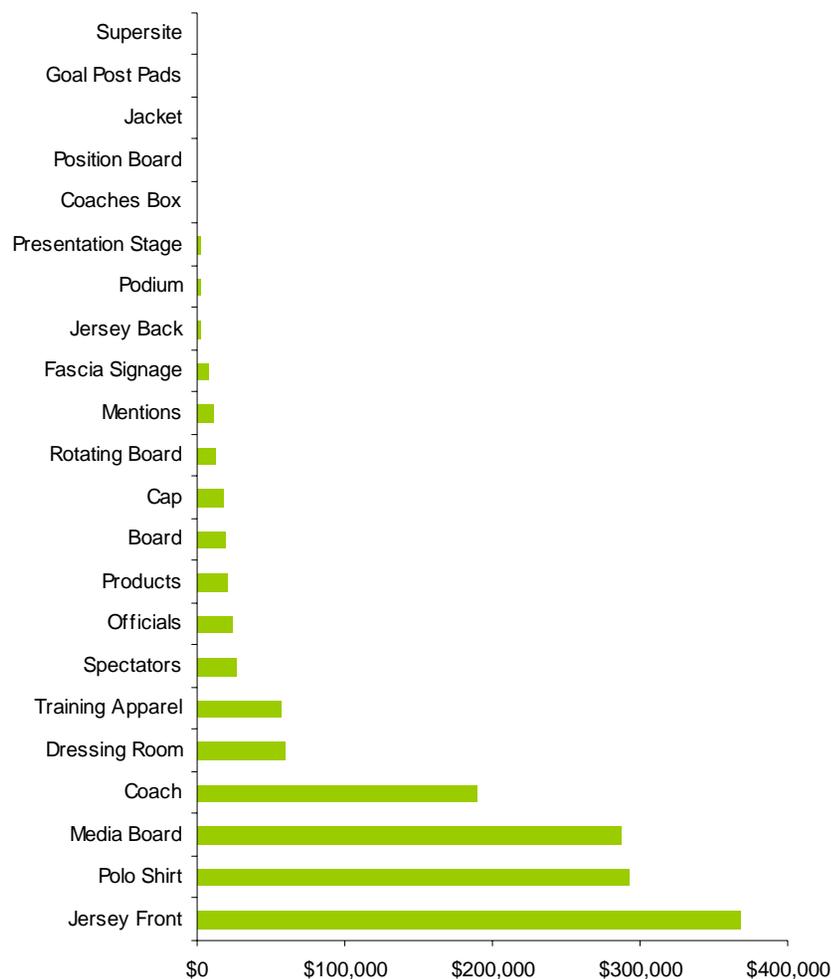
2.1.2 Tourism Tasmania – Television Peripheral Exposure

Repucom peripheral coverage analysis incorporates:

- Associated television news
- Sporting feature programs

Inventory	Exposure Time (Hr:Min:Sec)	Spindex® Rating Point (SRP)	Value (\$)
Jersey Front	0:20:22	915.8	\$367,881
Polo Shirt	0:32:20	727.1	\$292,295
Media Board	0:48:16	1426.7	\$286,839
Coach	0:24:46	471.4	\$189,414
Dressing Room	0:04:18	297	\$59,695
Training Apparel	0:04:28	142.8	\$57,295
Spectators	0:01:08	64.9	\$26,103
Officials	0:01:17	58.9	\$23,794
Products	0:01:10	37.8	\$20,261
Board	0:07:20	283.3	\$18,971
Cap	0:01:03	44	\$17,700
Rotating Board	0:01:32	61.8	\$12,403
Mentions	0:00:06	16.5	\$11,068
Fascia Signage	0:02:19	105.7	\$7,090
Jersey Back	0:00:20	6.8	\$2,740
Podium	0:00:19	11.6	\$2,323
Presentation Stage	0:00:19	12.5	\$2,001
Coaches Box	0:00:03	5.5	\$1,097
Position Board	0:00:02	3.7	\$746
Jacket	0:00:04	3.4	\$451
Goal Post Pads	0:00:03	2.7	\$355
Supersite	0:00:01	0.3	\$62
TOTAL	2:31:36	4700.2	\$1,400,584

Chart 3: Peripheral Exposure by Inventory



2.1.3 Tourism Tasmania – Print Media Exposure

Repucom print media analysis incorporates:

- Major metropolitan newspapers
- Sports related magazines and publications

Publication	Appearances	Editions	Circulation	Value (\$)
Editorial				
Herald Sun - Melb	13	4	2,204,000	\$3,313
The Age - Melb - SAT	9	2	706,000	\$1,909
The Age - Melb	5	3	606,000	\$666
Sunday Herald Sun - Melb	4	1	620,000	\$592
Sydney Morning Herald	2	1	210,000	\$242
Sunday Age - Melb	1	1	199,000	\$114
West Australian	1	1	208,000	\$86
Australian	1	1	137,900	\$80
Canberra Times - SAT	1	1	72,000	\$54
Geelong Advertiser	1	1	250,000	\$27
Sub Total	38	16	5,212,900	\$7,084
Pictorial				
Herald Sun - Melb	91	51	28,101,000	\$245,280
The Age - Melb	36	27	5,454,000	\$90,781
Herald Sun - Melb - SAT	29	14	7,126,000	\$85,926
Sunday Herald Sun - Melb	33	17	10,540,000	\$67,572
Sunday Age - Melb	26	14	2,786,000	\$41,152
West Australian	34	24	4,992,000	\$41,035
The Age - Melb - SAT	14	7	2,471,000	\$38,641
Examiner	71	38	1,377,158	\$28,334
Sun Herald	2	2	1,120,000	\$28,251
Adelaide Advertiser	31	24	4,944,000	\$23,101
Sunday Times	17	12	4,424,280	\$21,146
Sunday Mail - Ade	17	10	3,460,000	\$20,969
West Australian - SAT	13	10	3,731,530	\$20,781
The Mercury	22	18	871,794	\$10,719
Sunday Telegraph	5	3	2,202,000	\$10,126
Sunday Mail - Bris	6	5	2,950,000	\$9,143
Daily Telegraph	5	5	1,990,000	\$7,845

Print Media continued

Publication	Appearances	Editions	Circulation	Value (\$)
Geelong Advertiser	28	17	4,250,000	\$7,655
Australian Weekend	5	2	268,000	\$7,343
Canberra Times	10	7	259,000	\$7,273
AFL Record	24	13	3,796,000	\$7,262
The Advocate	41	24	943,200	\$6,643
Adelaide Advertiser - SAT	7	4	1,108,000	\$4,832
Courier Mail - Bris	4	4	844,000	\$4,288
The Herald	5	5	255,000	\$3,709
The Mercury - Sat	9	5	242,165	\$3,551
Australian	7	5	689,500	\$3,441
Gold Coast Bulletin	10	10	470,690	\$3,358
Canberra Times - SAT	6	5	360,000	\$3,322
Sunday Canberra Times	4	4	156,000	\$3,283
Sydney Morning Herald	2	2	420,000	\$2,875
Illawarra Mercury	4	4	130,400	\$2,733
Inside Football	20	12	288,000	\$2,245
Gold Coast Bulletin - SAT	5	2	94,138	\$2,129
Geelong Advertiser - SAT	6	5	1,250,000	\$1,971
Courier Mail - Bris - SAT	1	1	343,000	\$1,660
SMH - SAT	1	1	396,000	\$1,441
The Herald - SAT	2	2	158,000	\$1,154
Daily Telegraph - SAT	1	1	339,000	\$1,103
Townsville Bulletin	3	3	79,977	\$796
Illawarra Mercury - SAT	1	1	32,600	\$539
Herald On Sunday NZ	1	1	160,000	\$212
Australian Fin. Review	1	1	85,864	\$157
Sub Total	660	422	105,959,296	\$875,779
TOTAL	698	438	15,808,829	\$882,863

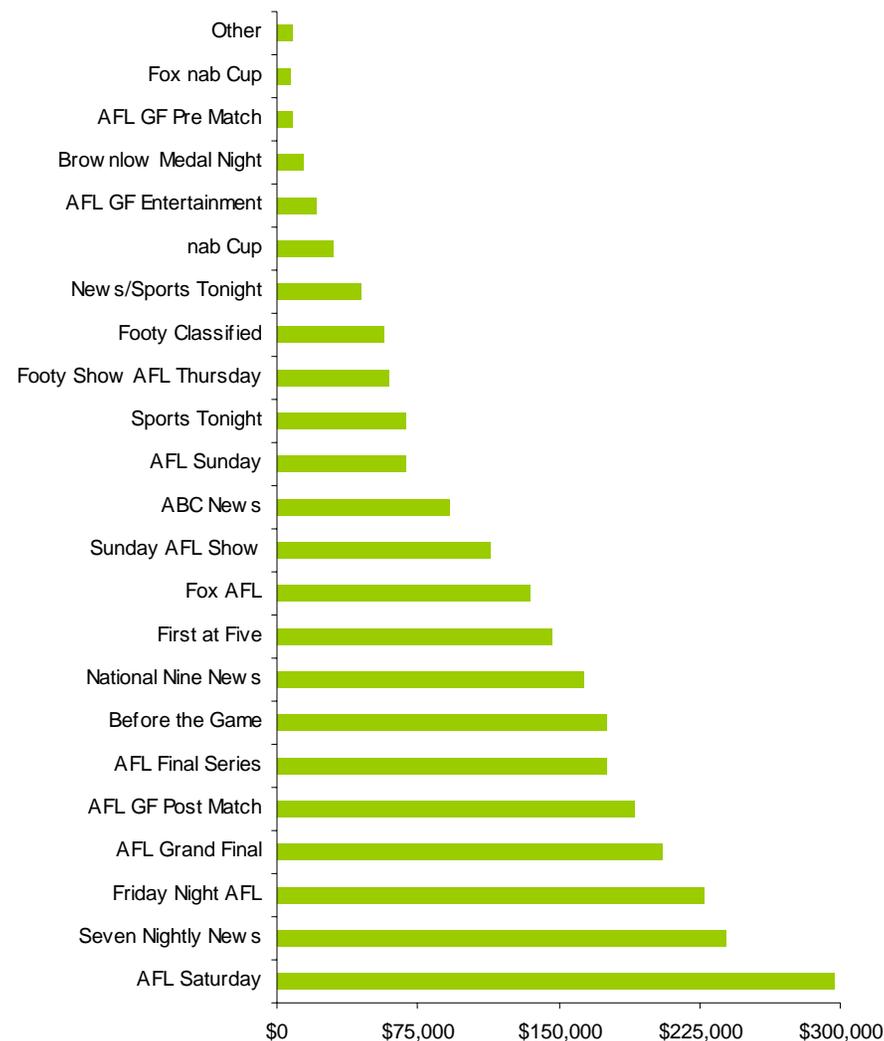
2.2 Television Exposure by Broadcast

Repucom television coverage analysis incorporates:

- Match broadcasts on FTA & Fox Sports
- Associated television news & sporting feature programs

Broadcast	Exposure Time (Hr.Min:Sec)	Spindex® Rating Point (SRP)	Value (\$)
AFL Saturday	1:01:51	1071	\$297,173
Seven Nightly News	0:18:13	853.4	\$239,348
Friday Night AFL	0:19:01	780.9	\$227,463
AFL Grand Final	0:03:43	552	\$204,978
AFL GF Post Match	0:04:25	508.7	\$190,142
AFL Final Series	0:10:58	538.8	\$175,149
Before the Game	0:20:22	461	\$174,917
National Nine News	0:18:04	629.9	\$163,812
First at Five	0:27:59	544.6	\$146,332
Fox AFL	1:55:17	530.2	\$134,961
Sunday AFL Show	0:23:49	297	\$113,510
ABC News	0:11:57	385.2	\$91,783
AFL Sunday	0:21:25	238.8	\$69,240
Sports Tonight	0:04:30	308.1	\$68,962
Footy Show AFL Thursday	0:04:41	163.2	\$60,185
Footy Classified	0:11:19	161.1	\$56,661
News/Sports Tonight	0:03:32	167	\$44,414
nab Cup	0:03:19	75.2	\$30,149
AFL GF Entertainment	0:01:29	104.8	\$21,061
Brownlow Medal Night	0:00:15	50	\$13,661
AFL GF Pre Match	0:00:24	32.2	\$8,105
Fox nab Cup	0:10:34	31	\$7,182
Wide World Of Sports	0:00:12	10.2	\$3,696
World News Australia	0:00:17	17.1	\$3,104
World News	0:00:06	6	\$842
Seriously AFL	0:00:02	0.7	\$49
TOTAL	6:37:44	8518.1	\$2,546,879

Chart 4: Television Exposure Value by Broadcast

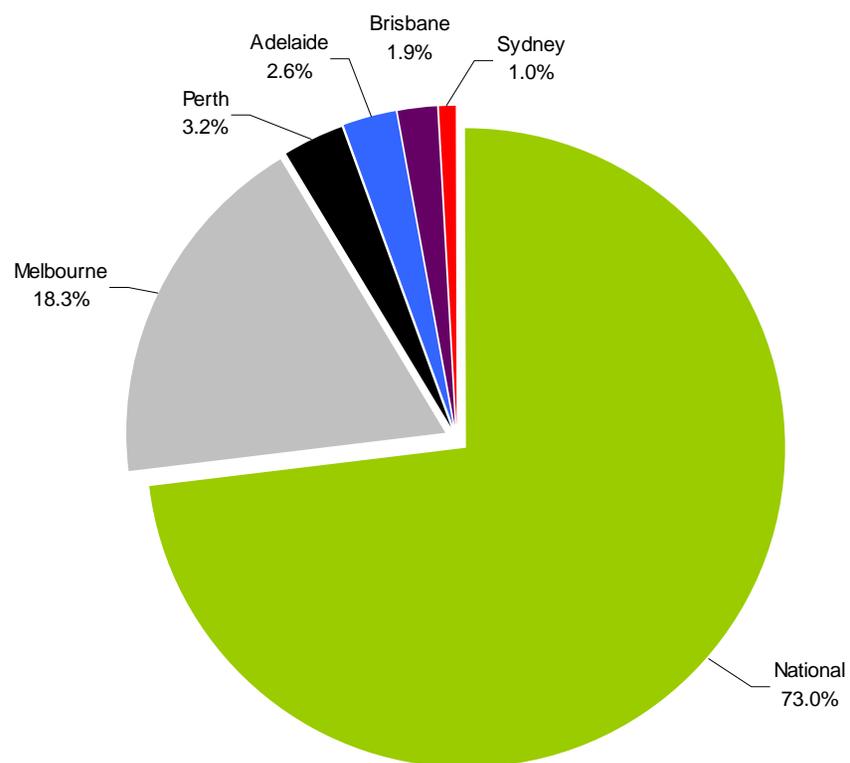


2.3 Television Exposure by Market

Repucom television coverage analysis incorporates:

- Match broadcasts on FTA & Fox Sports
- Associated television news & sporting feature programs

Chart 5: Television Exposure Value by Market



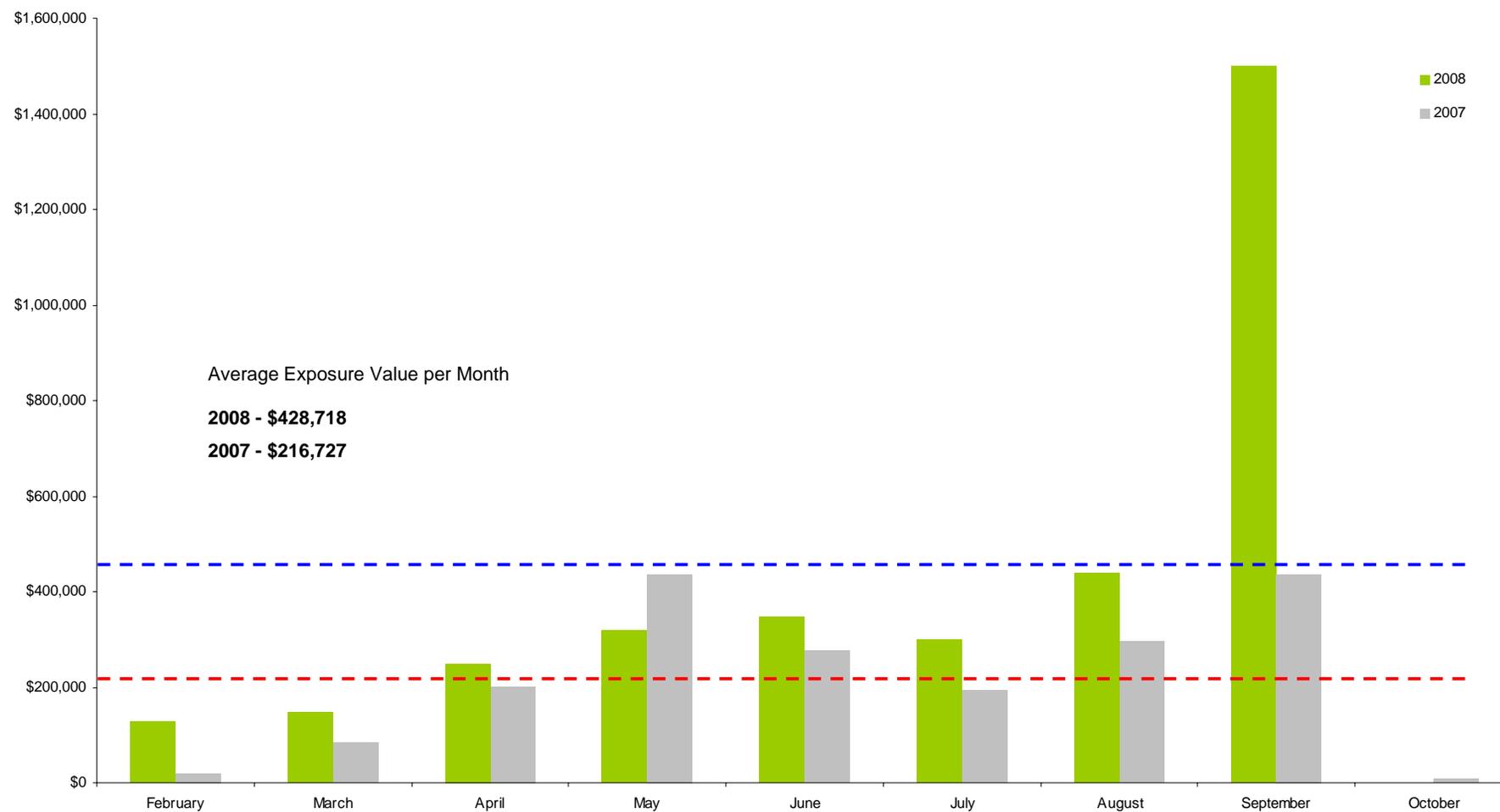
2007 Exposure by Market Results

National – 74.0%
 Melbourne – 16.0%
 Adelaide – 4.0%
 Perth – 1.7%
 Brisbane – 1.6%
 Sydney – 1.6%

2.4 Total Exposure Value by Month

The following chart highlights Tasmania total exposure value by month throughout the 2008 season.

Chart 6: Total Exposure Value by Month

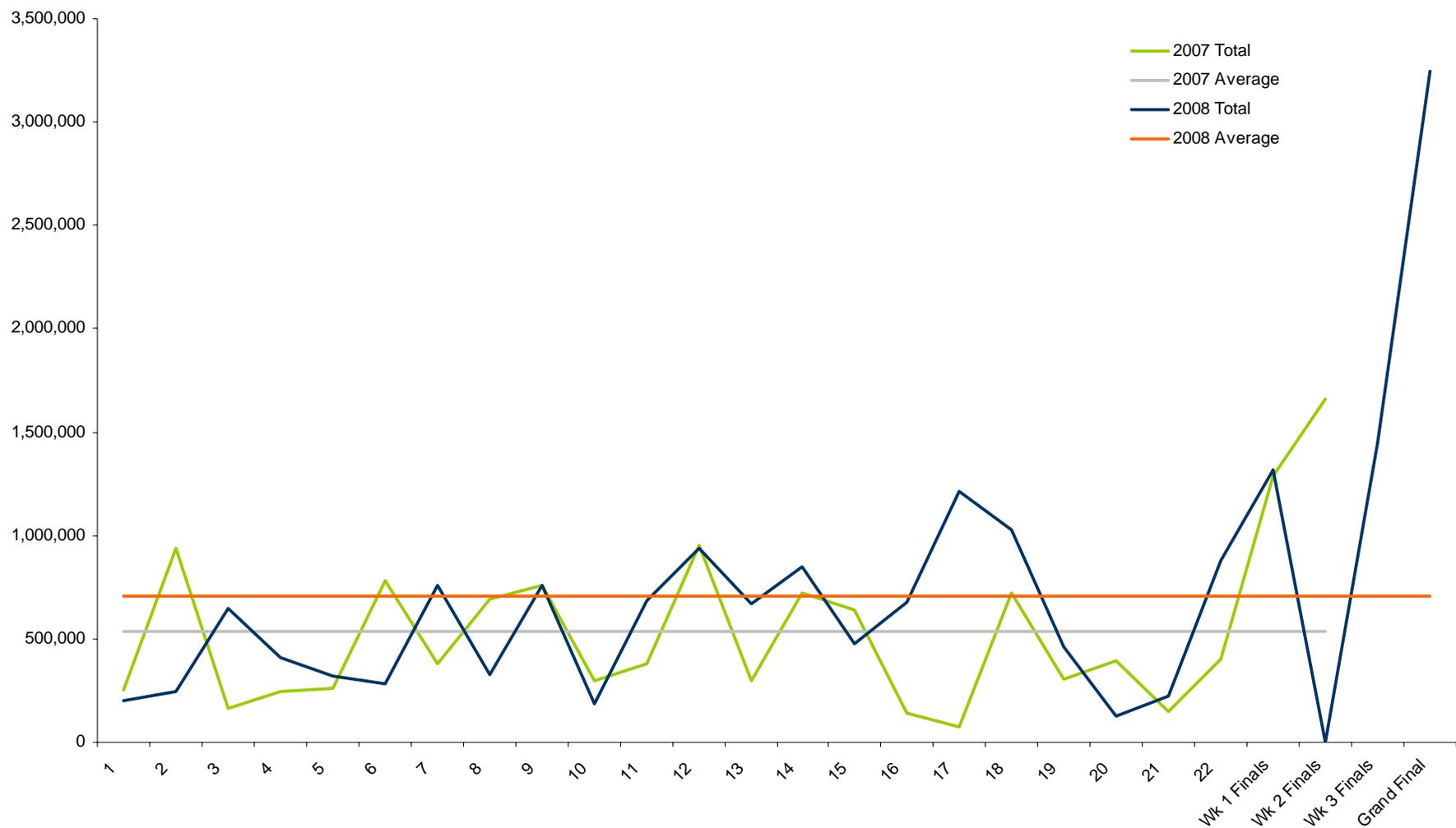


2.5 Hawthorn FC Television Audience and Attendance Research

Round	Fixture	Venue	Ground Attendance		FTA Audience	Fox Sports Audience
			Home	Away		
1	Demons	MCG	40,141			198,364
2	Dockers	Subiaco Oval		38,022	125,786	120,154
3	Kangaroos	Telstra Dome		39,816	630,502	17,099
4	Crows	Aurora Stadium	15,124		206,358	202,605
5	Lions	Gabba		30,019	141,523	175,071
6	Tigers	MCG	46,076			284,355
7	Magpies	MCG	76,048		737,659	24,824
8	Power	Aurora Stadium	15,682		134,697	192,508
9	Demons	MCG		41,341	716,367	39,926
10	Bulldogs	Aurora Stadium	19,378			184,425
11	Bombers	Telstra Dome		46,377	661,668	24,555
12	Crows	AAMI Stadium		44,559	915,036	23,078
13	Kangaroos	MCG	42,508		660,347	10,398
14	Eagles	MCG	29,138		841,950	5,551
15	Swans	MCG	49,529		253,310	219,963
16	Saints	Telstra Dome		41,886	658,137	23,064
17	Cats	MCG	86,179		1,193,255	20,534
18	Magpies	MCG		58,307	1,014,192	13,156
19	Lions	Aurora Stadium	19,929		438,673	21,179
20	Tigers	MCG		44,523		126,424
21	Eagles	Subiaco Oval		37,040		220,296
22	Blues	Telstra Dome		49,075	844,815	36,352
Wk 1 Finals	Bulldogs	MCG	76,703		1,310,103	8,458
Wk 2 Finals						
Wk 3 Finals	Saints	MCG	77,002		1,423,734	25,376
Grand Final	Cats	MCG		100,012	3,187,664	60,073
TOTAL			593,437	570,977	16,095,776	2,277,788

Source: OzTam and AGB Nielsen Media Research

Chart 7: Benchmarking Hawthorn FC Television Audiences



2.6 Exposure Snapshots

1. Jersey Front



2. Board



3. Coach / Jersey Front



4. Fascia Signage



5. Rotating Board



6. Goal Post Pad



Exposure Snapshots continued

7. Rotating Board



8. Grouped Signage



9. Training Apparel



10. Jersey Front



11. Supersite



12. Dressing Room



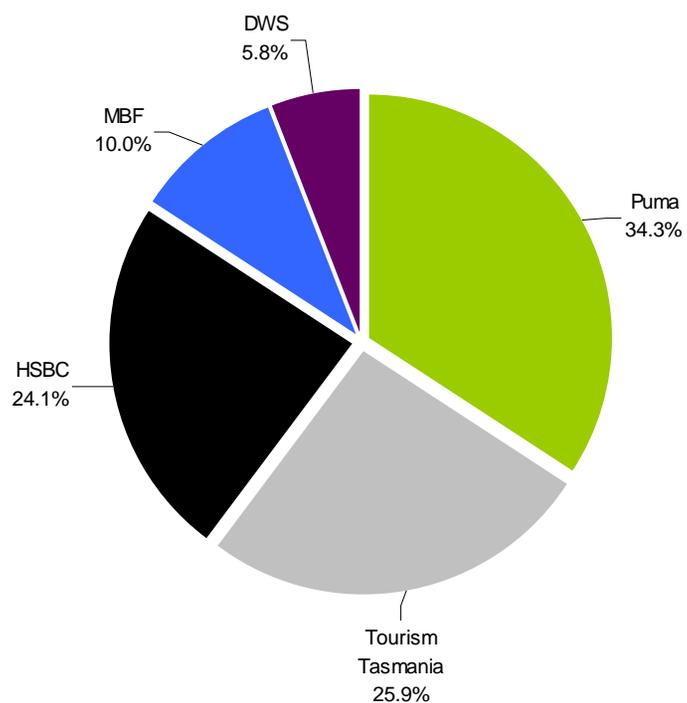
3.0 Benchmarking Analysis

3.1 Hawthorn FC Sponsor Exposure Value

The following table benchmarks the share of voice generated by each Hawthorn FC sponsor during the 2008 season:

Sponsor	Match	Peripheral	Print	Total
Puma	\$1,564,473	\$1,590,963	\$1,394,759	\$4,550,195
Tourism Tasmania	\$1,146,295	\$1,400,584	\$882,863	\$3,429,742
HSBC	\$1,684,802	\$1,191,386	\$314,622	\$3,190,810
MBF	\$442,977	\$211,922	\$671,575	\$1,326,474
DWS	\$302,810	\$426,646	\$37,615	\$767,071
TOTAL	\$5,141,357	\$4,821,501	\$3,301,434	\$13,264,292

Chart 8: Hawthorn FC Share of Voice



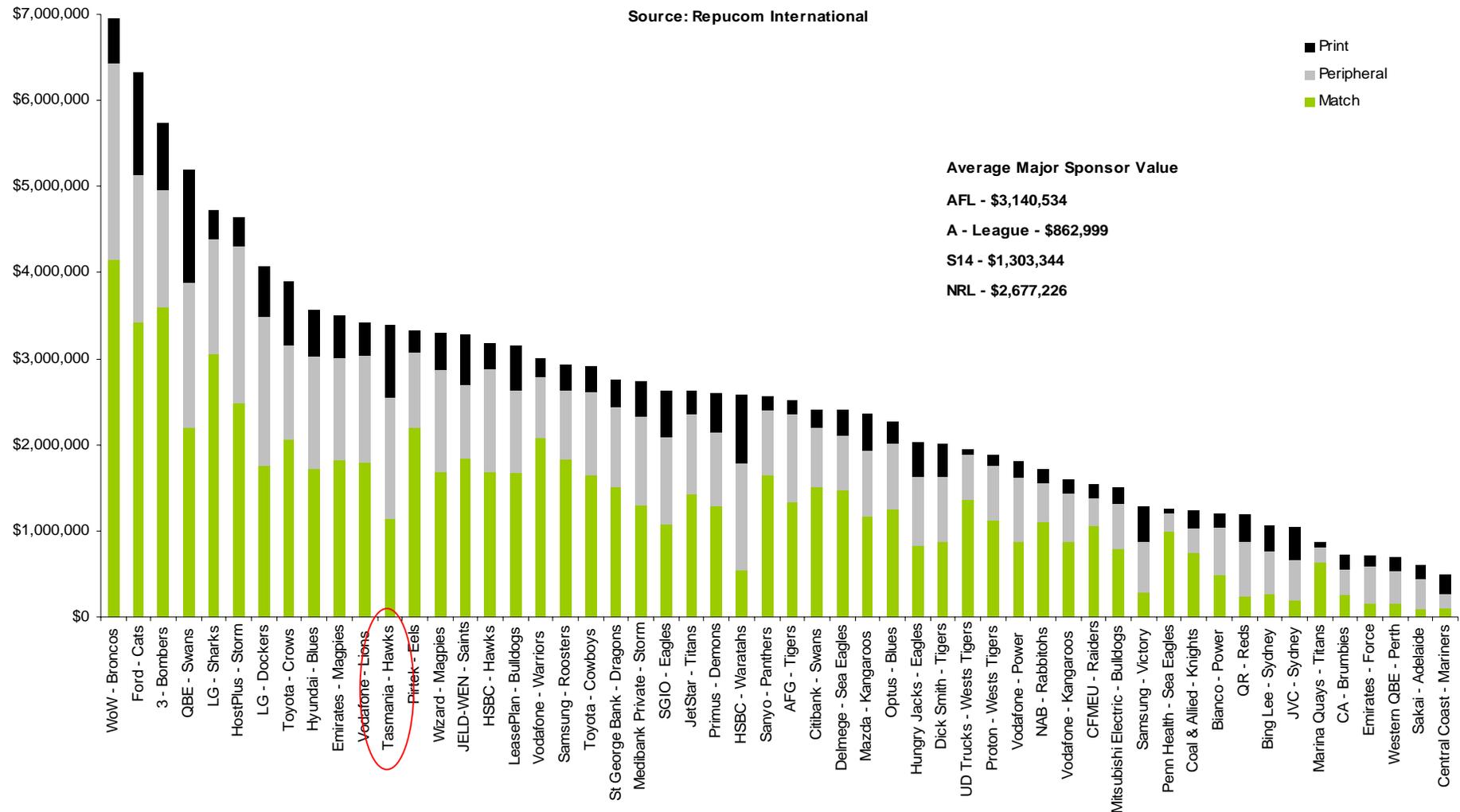
2007 Share of Voice Results

- Tourism Tasmania – 35%
- HSBC – 28%
- Puma – 24%
- MBF – 13%

3.2 Benchmarking Total Exposure Value – All Football Codes

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

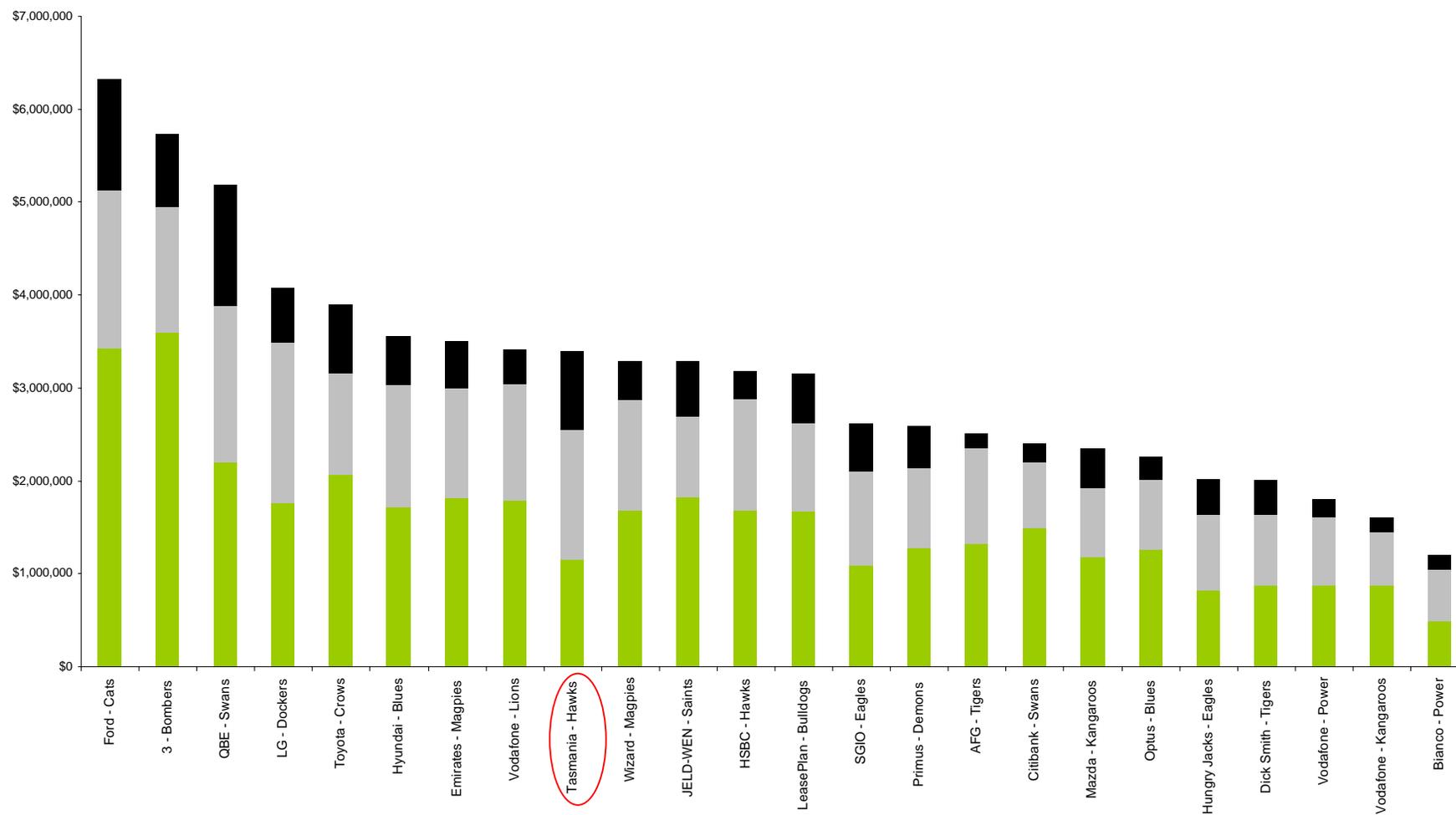
Chart 9: Benchmarking Total Exposure Value – All Football Codes



3.3 Benchmarking Total Exposure Value – AFL Only

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

Chart 10: Benchmarking Total Exposure Value – AFL Only



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 or 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 Methodology

5.1 SpindeX2® Analysis

Television analysis is conducted using Radiuss automated image recognition technology. **Repucom** has developed an advanced version of our sponsorship television evaluation system - **SpindeX2®**. This improved sponsorship television evaluation system includes automated image recognition software, Radiuss, to capture sponsor television exposure data, combined with the market accepted analysis and valuation methodologies unique to the **Spindex®** system. As a final layer, **Repucom** 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 **Repucom** 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

Repucom analyses major metropolitan newspapers and a selection of sport/sponsorship specific publications for editorial and pictorial references to sponsor brands, logos & mentions.

Appropriate advertising rates 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.

Repucom International

Part II - Consumer Research

Tasmania as a Destination



REPUcom
international

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Background & Objectives

Repucom (formerly S-COMM Australia) conducted a consumer research study in 2007 for Tourism Tasmania to understand the impact of the Hawthorn Football Club naming rights sponsorship on driving awareness of Tasmania as a tourist destination. Repucom were again engaged in 2008 to replicate the study, specifically focused on understanding changes in year on year results.

The key objectives of the 2008 Tourism Tasmania consumer research study, as defined in 2007, are:

- i. Identify the level of awareness of Aurora Stadium as an AFL venue*
- ii. Identify the level of sponsorship awareness of Tasmania's sponsorship of HFC*
- iii. Identify the level of association with Tasmania image statements*
- iv. Identify the level of consideration of Tasmania as a tourist destination*
- v. Identify current travel behaviour and reasons for travel to Tasmania*

The Tourism Tasmania research program has been based on a composite sample structure of AFL fans, non-AFL fans and a boost of Hawthorn supporters.

Methodology & Sample Structure

Outlined below is the structure of the 2008 Tasmania destination research program, along with a brief outline of the sample composition employed for the study:

2008 METHODOLOGY

- ❖ Online administered interviews
- ❖ Field conducted from 5th – 15th November 2008.
- ❖ N = 610
- ❖ Melbourne residents only

Total Base		N=610
Melbourne Residents	Non AFL Fans	150
	General AFL Fans (not Hawks as favourite AFL team)	310
	Hawthorn Supporters* (Hawks as favourite AFL team)	150

*Within the sample of 150 Hawthorn supporters, a percentage of Club members were collected, equating to a Hawthorn base of:

- 111 *general Hawks fans*
- 39 *Hawthorn FC members*

Respondent Profile

Age Group (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
18 – 24	21	15	19
25 – 34	13	33	23
35 – 44	29	26	25
45 – 54	19	18	17
55+	18	8	15
Mean	40.7	37.4	39.2

Marital Status (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
Married	43	45	46
Defacto	11	14	18
Single	33	32	30
Widowed	1	1	1
Divorced	8	7	4
Engaged	3	1	1

Household Children <15 (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
None	67	58	69
One	17	16	11
Two	11	17	17
Three	4	8	2
Four or more	1	1	1

Highest Level of Education (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
Primary school or some secondary school	10	7	7
Completed high / secondary school	15	22	19
Completed TAFE or commercial tertiary college	21	14	12
Some tertiary experience	9	11	12
Completed diploma	11	11	11
Completed degree	20	23	17
Higher degree / diploma	13	12	21

Respondent Profile

Employment Status (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
Full time	38	48	48
Part time	19	19	27
Retired	7	3	1
Student	13	8	7
Looking for work	2	3	3
Home Duties	17	16	9
Do not work	3	2	2

Annual Household Income (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
Under \$15k	7	3	4
\$15,600 - \$25,999	6	6	4
\$26,000 - \$36,399	5	6	9
\$37,000 - \$51,999	11	13	10
\$52,000 - \$77,999	19	17	19
\$78,000 - \$103,999	13	19	18
\$104,000 - \$129,999	9	12	7
\$130,000 - \$149,999	6	4	7
\$150k or more	7	8	15

Occupation (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
Professional	8	12	15
Other professional	25	16	15
Manager / business owner	20	22	21
Sales person, shop worker	10	16	17
Skilled or semi-skilled worker	12	13	10
Other manual worker	4	5	6
Other	16	15	15
Never been employed	4	1	1

Household Children <15 (%)	Non AFL Fans	General AFL Fans	Hawthorn Supporters
One	35	33	31
Two	37	46	45
Three	9	8	10
Four	4	5	5
Five or more	3	3	2



Research Findings:

Stage 1 – AFL Interest

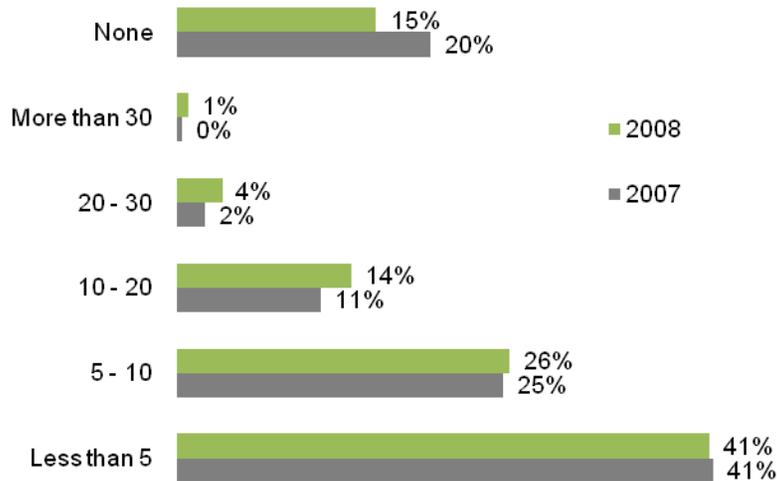
AFL Consumption

GENERAL AFL INTEREST

Consistent levels of AFL interest have been recorded year on year, with 42% of AFL fans stating a 'strong' interest in the game (41% in 2007).

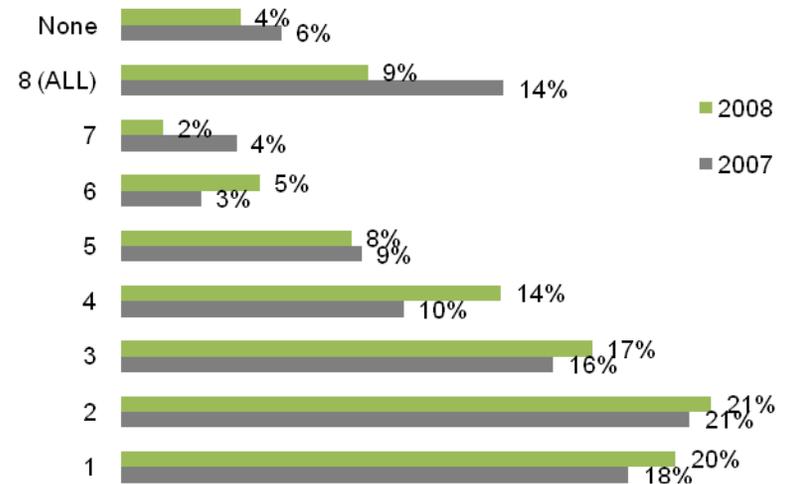
AVERAGE AFL SEASON ATTENDANCE (NO. GAMES)

Increased attendance has been recorded among AFL fans in 2008, with 85% attending at least 1 game during the season, up from 80% in 2007.



AVERAGE AFL WEEKLY TV VIEWING (NO. GAMES)

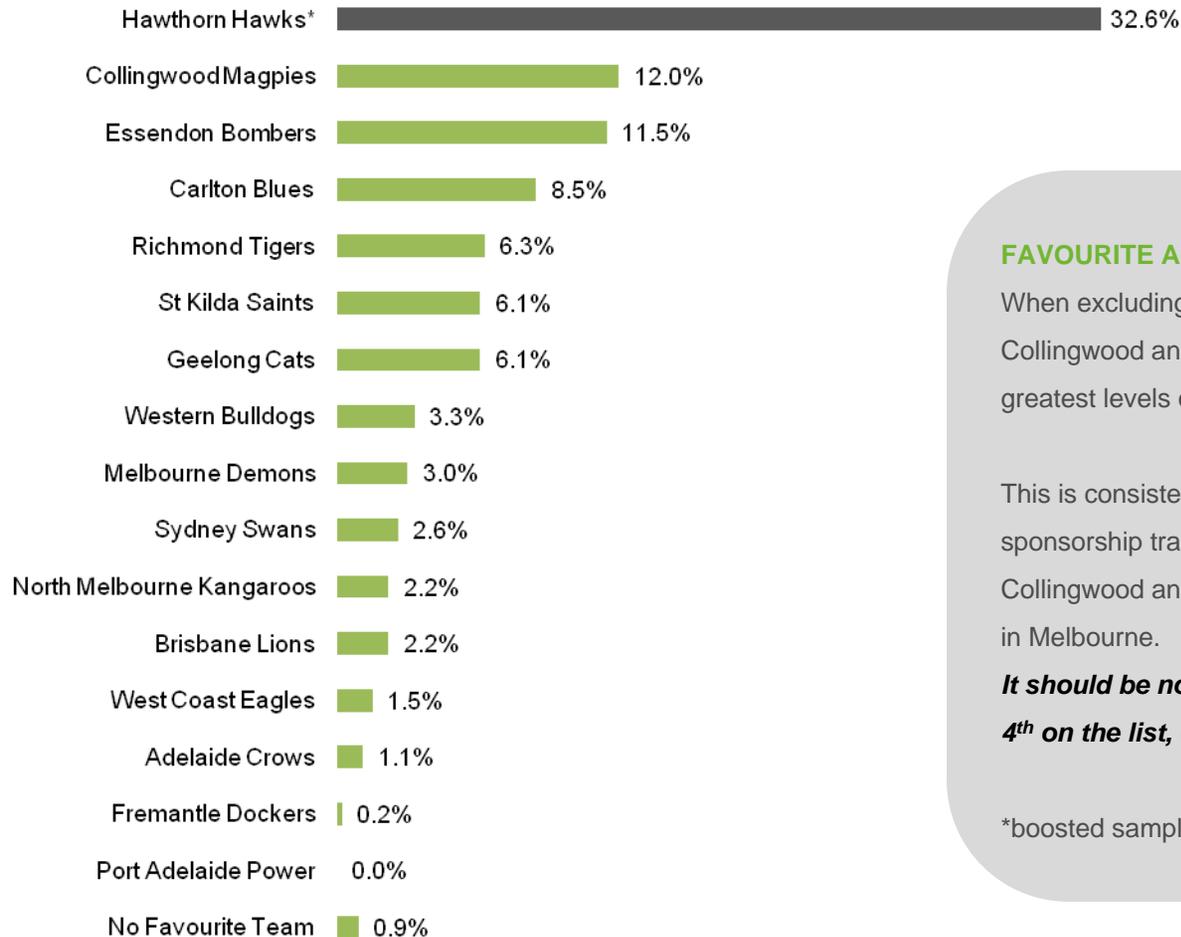
AFL respondents in 2008 are less likely to watch all 8 fixtures per week on TV, however are more likely to watch at least 1 or more AFL games per week.



Question: On average, how many AFL games would you attend in a season? Watch on TV per week during regular season?

Base: All respondents with a stated interest in AFL (n=460)

AFL Team Support



FAVOURITE AFL TEAM

When excluding the boost of Hawthorn supporters, Collingwood and Essendon continue to generate the greatest levels of support amongst Melbourne AFL fans.

This is consistent with Repucom's on-going sport and sponsorship tracker, *SponsorLink*, which outlines Collingwood and Essendon as the most supported teams in Melbourne.

It should be noted however that Hawthorn now ranks 4th on the list, up from a rank of 6th in 2007.

*boosted sample

Question: Which AFL team is your favourite?
Base: All respondents with a stated interest in AFL (n=460)

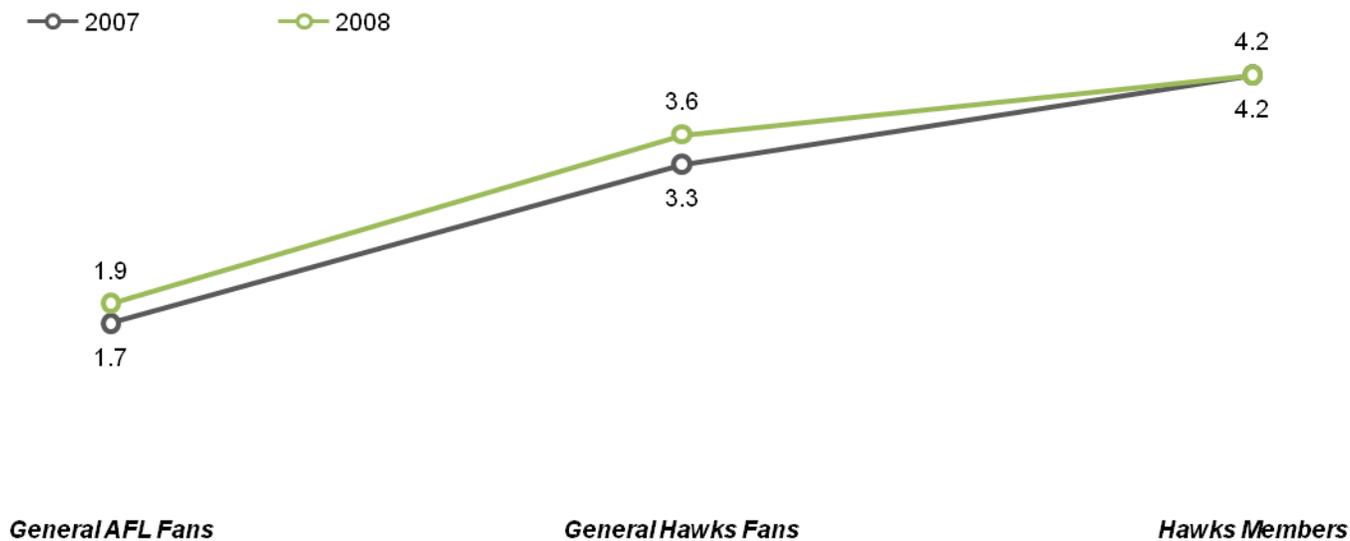
Level of Hawthorn Hawks Support

HAWTHORN HAWKS SUPPORT RATING – MEAN RATING (1-5/5)

Of the boosted sample of 150 Hawthorn fans, 26% were current members of the club (n=39).

While consistent levels of team support have been recorded among existing members year on year, slight increases in Hawthorn support have been recorded among general AFL fans and general Hawks fans (non-members).

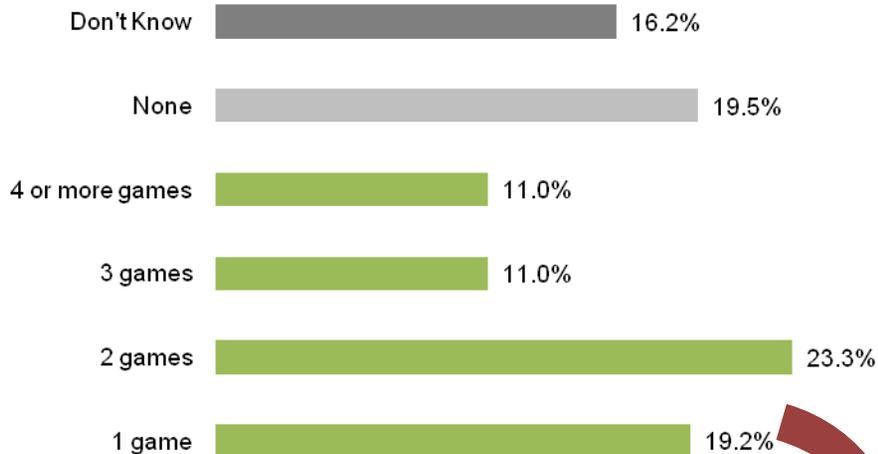
The number of general AFL fans stating 'no support' towards the Hawks has fallen from 55% in 2007 to 46% in 2008.



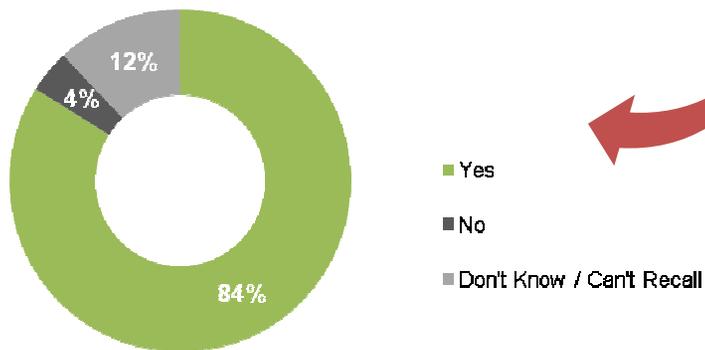
Question: If you were to rate your level of support for the Hawthorn Hawks, how would you rate your support? Scale 1 – no support at all to 5 – strong supporter
Base: All respondents with a stated interest in AFL (n=460)

Aurora Stadium Awareness

Aurora Stadium TV Viewing



Aware Games Were in Tasmania at Time of Viewing



Question: Were you aware that Hawthorn FC played several games in 2008 at Aurora Stadium? How many of these games did you watch on TV?
 Were you aware at the time of watching that these were being played in Tasmania?
 Base: All respondents with a stated interest in AFL (n=460)

HAWTHORN FC / AURORA STADIUM AWARENESS

Close to 80% of respondents were aware that Hawthorn played games in Tasmania during 2008 (71% awareness in 2007):

- 76% awareness among general AFL fans, up from 63% in 2007
- 84% awareness among general Hawks fans, down from 89% in 2007
- 92% awareness among Hawks members, up from 85% in 2007

AURORA STADIUM TV VIEWING

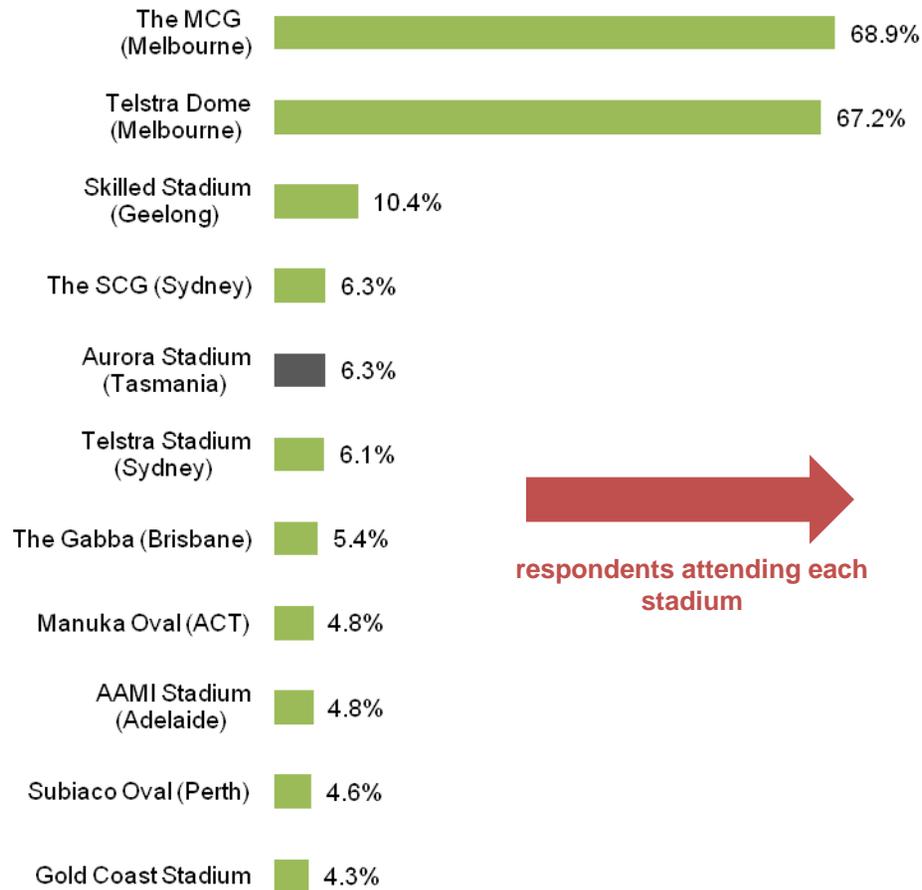
The above increase in awareness has in turn led to a decline in Tasmanian TV game viewing. Only 64% of respondents aware of the games viewed one or more on TV, down from 73% viewing in 2007. Viewing among general AFL was the contributing factor for this decline, with 'non-viewing' sitting at 45% (34% in 2007)

AWARENESS OF TASMANIA AT TIME OF VIEWING

Awareness of Tasmania at time of viewing is down slightly year on year, 88% in 2007 to 84% in 2008.

2008 AFL Stadium Attendance

Minimum 1 Game Attendance



→
respondents attending each stadium

2008 AFL ATTENDANCE

Aurora attendance is up slightly in 2008 across all AFL supporters, 4.4% in 2007 to 6.3% in 2008.

Attendance among general AFL and general Hawks fans sat at under 5%, however 26% of Hawks members has attended the stadium in 2008.

Stadium	Average No. Games Attended
MCG	3.0
Telstra Dome	2.7
Skilled Stadium	2.2
SCG	1.7
Aurora Stadium	2.0
Telstra Stadium	2.0
GABBA	1.7
Manuka Oval	2.6
AAMI Stadium	2.1
Subiaco Oval	2.1
Gold Coast Stadium	2.1

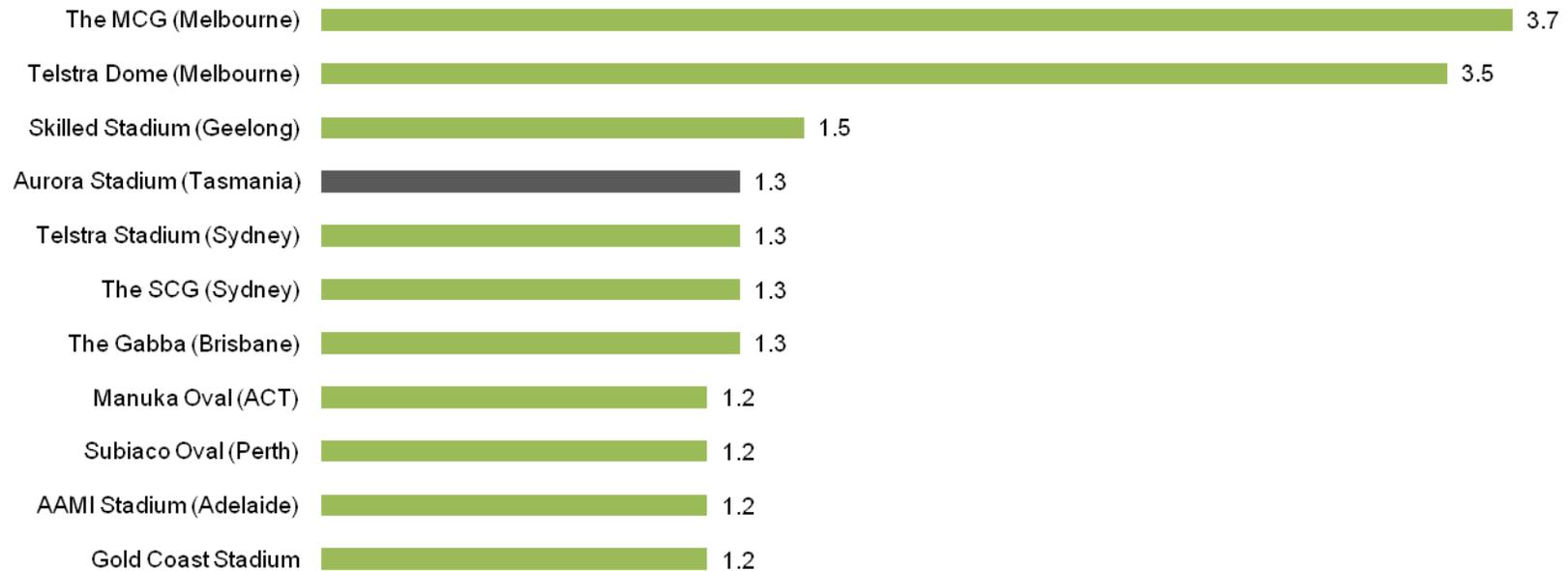
Question: How many matches did you attend at the following stadiums during the 2008 AFL season?
Base: All respondents with a stated interest in AFL (n=460)

2009 Attendance Likelihood

MEAN LIKELIHOOD OF 2009 STADIUM ATTENDANCE (1-5/5)

The likelihood of AFL supporters attending AFL games at Aurora Stadium in 2009 remains quite low, recording a mean rating of 1.3 (out of 5). As in 2007, Hawks members display the greatest intent to travel to the venue, recording a mean rating of 2.2.

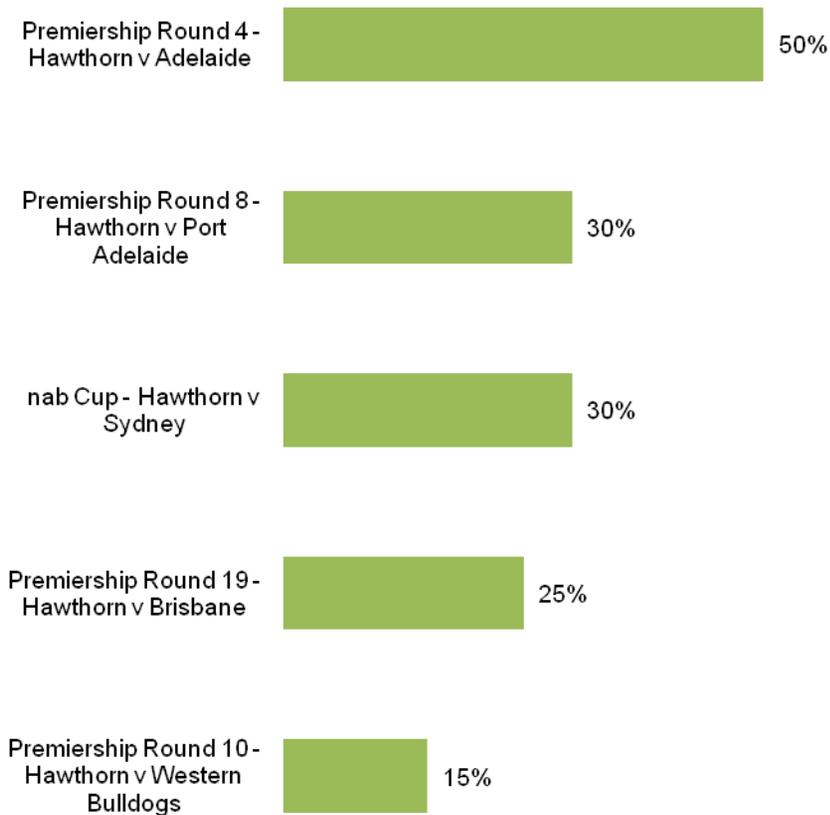
Mean Likelihood Rating (1-5/5)



Question: How likely would you be to attend an AFL game at these venues in 2009? Scale 1 – very unlikely to 5 – very likely
Base: All respondents with a stated interest in AFL (n=460)

Aurora Stadium Attendance Summary

2008 Games Attended



2008 ATTENDANCE

With only 6% of AFL supporters attending Aurora Stadium games in 2008, this equated to only 20 respondents.

Of these respondents, 1 in 2 attended the Hawks Round 4 fixture against Adelaide.

2009 ATTENDANCE

As mentioned above, Hawks members are the most likely to travel in 2009, with over 1 in 3 stating they would be 'somewhat' to 'very' likely to attend.

Question: Which of the following matches did you attend at Aurora Stadium?

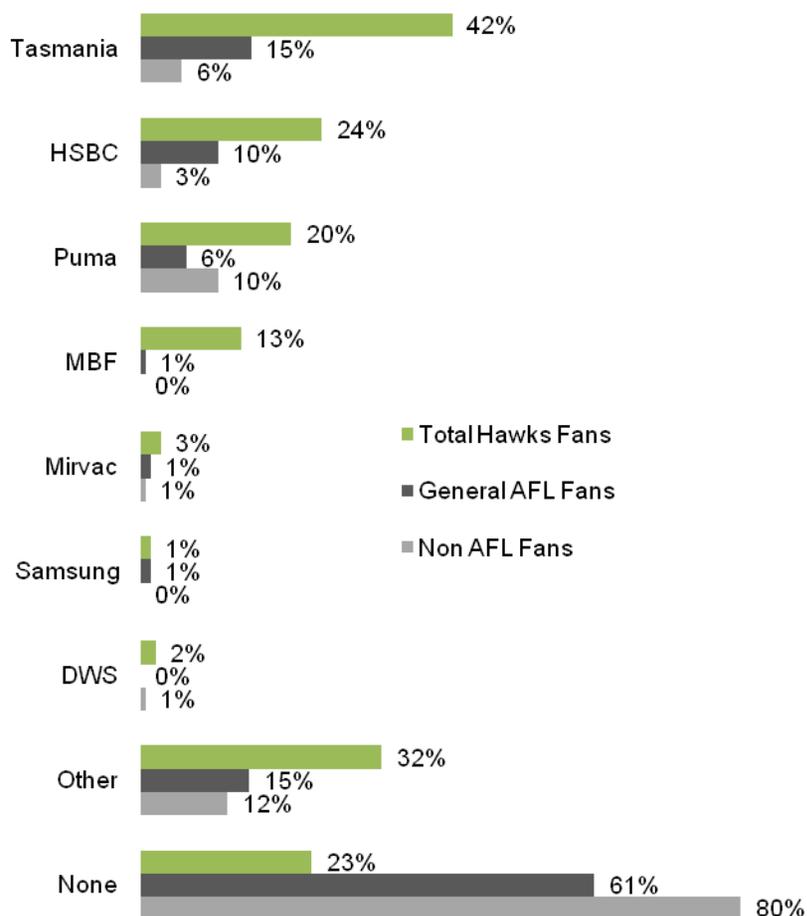
Base: All respondents who attended Aurora Stadium game in 2008 (n=20*) *Note: low sample



Research Findings:

Stage 2 – Tasmania Sponsorship Awareness

Unprompted Hawthorn Hawks Sponsor Recall



HAWTHORN SPONSOR RECALL

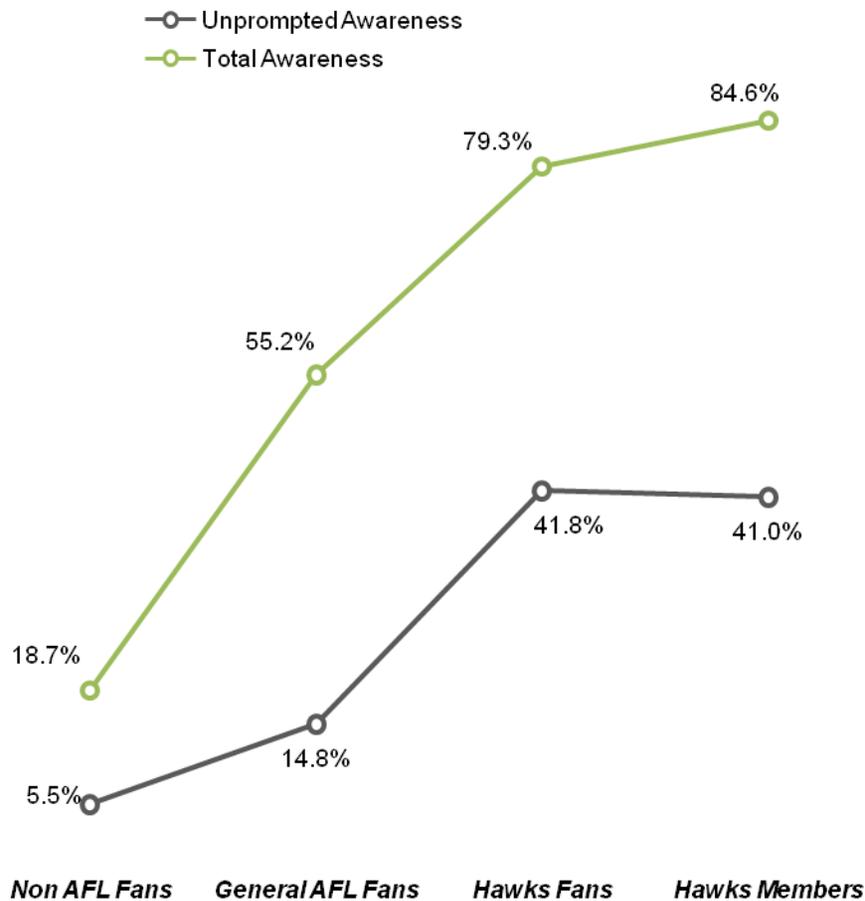
Tasmania is now the brand most associated with the Hawthorn Football Club.

A significant increase in sponsorship awareness has been recorded for Tasmania, across all AFL interest types. General AFL and Hawks supporters are 1.5 times more likely to recall Tasmania as a sponsor of the team in comparison to HSBC.

Hawthorn Sponsor Awareness Over Time		2007	2008
Non AFL Fans	Tasmania	2%	6%
	HSBC	2%	3%
General AFL Fans	Tasmania	4%	15%
	HSBC	5%	10%
Total Hawks Fans	Tasmania	32%	42%
	HSBC	33%	24%

Question: Can you recall any sponsors of the Hawthorn Hawks AFL team?
Base: All respondents (n=610)

Tasmania Sponsorship Awareness Summary



TASMANIA SPONSORSHIP

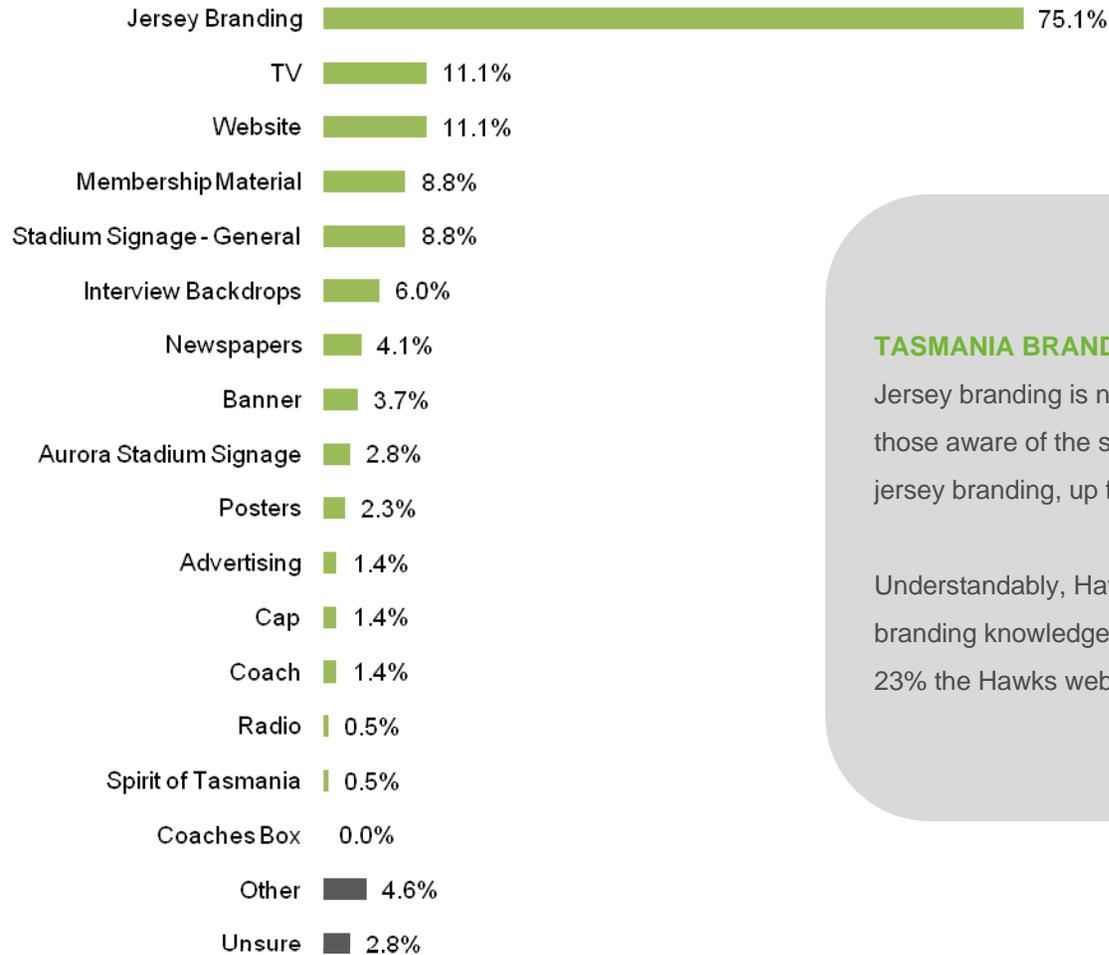
A substantial increase in unprompted and total awareness (once prompted) has been recorded for Tasmania in the 2nd year of the Hawks sponsorship.

It is interesting to note however at an unprompted level, similar levels of awareness exist among general Hawks fans and Hawks members.

Tasmania Awareness Over Time		2007	2008
Unprompted Awareness	Non AFL Fans	2.0%	5.5%
	General AFL Fans	3.9%	14.8%
	Hawks Fans	29.2%	41.8%
	Hawks Members	39.4%	41.0%
Total Awareness	Non AFL Fans	8.1%	18.7%
	General AFL Fans	27.8%	55.2%
	Hawks Fans	65.5%	79.3%
	Hawks Members	84.8%	84.6%

Question: Can you recall any sponsors of the Hawthorn Hawks AFL team? Were you aware that Tasmania is a sponsor of Hawthorn FC?
Base: All respondents (n=610)

Sources of Tasmania Awareness



TASMANIA BRANDING AWARENESS

Jersey branding is now the primary source of awareness among those aware of the sponsorship. 3 in 4 respondents recalled jersey branding, up from 48% recall in 2007.

Understandably, Hawks members display a wider array of branding knowledge, with 40% recalling membership material, 23% the Hawks website and 13% the club banner.

Question: Can you recall where you have seen Tasmania branding relating to the Hawthorn sponsorship?
 Base: All respondents aware of Tasmania's sponsorship (n=320)

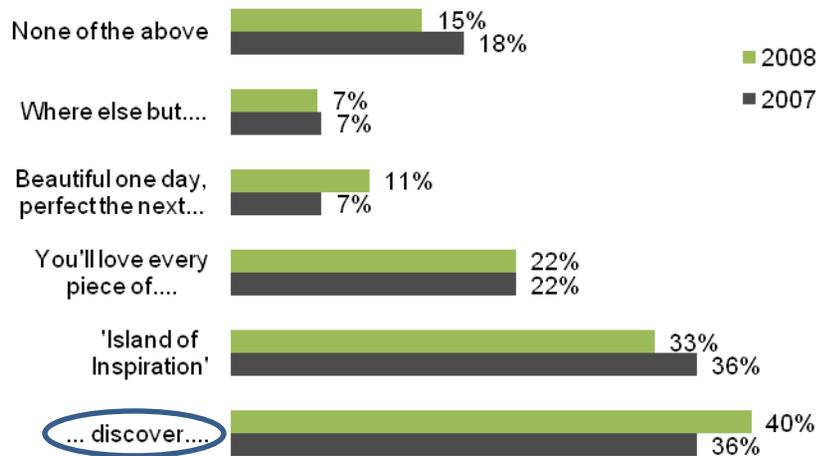


Research Findings:

Stage 3 – Tasmania Brand Image

Tasmania Statement Association

All Respondents



TASMANIA BRANDING ASSOCIATION

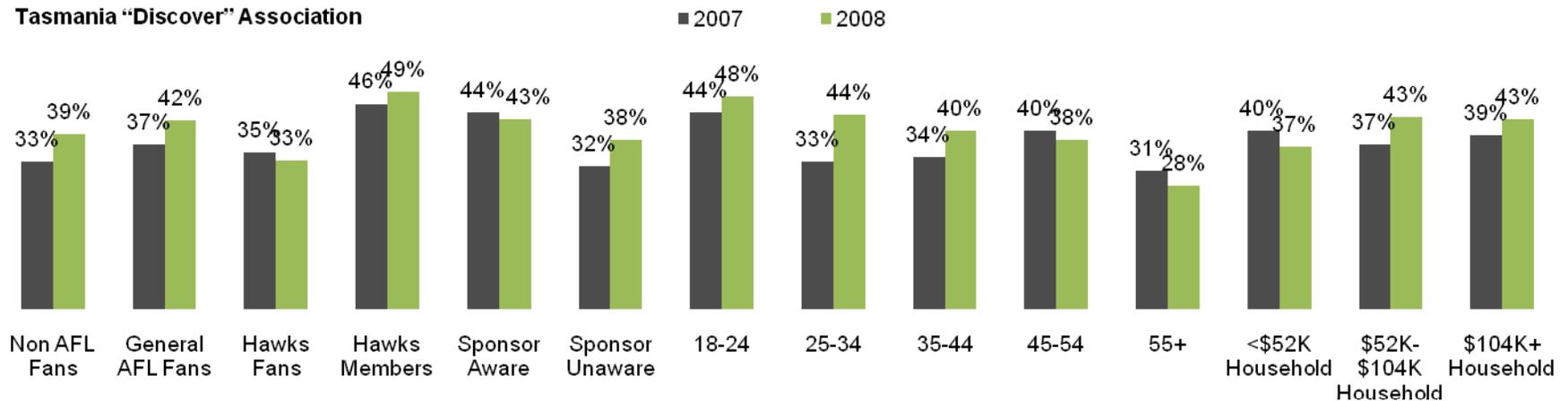
An overall increase has been recorded in the number of people associating Tasmania with "Discover".

In contrast, a slight decline was recorded towards "island of inspiration".

"DISCOVER" ASSOCIATION

Hawks members display the greatest association between Tasmania and "discover", while respondents aged 18-24 also display increased levels of association.

Tasmania "Discover" Association



Question: Which of the following statements would you associate with Tasmania?

Base: All respondents (n=610)



Research Findings:

Stage 4 – Tasmania Consideration

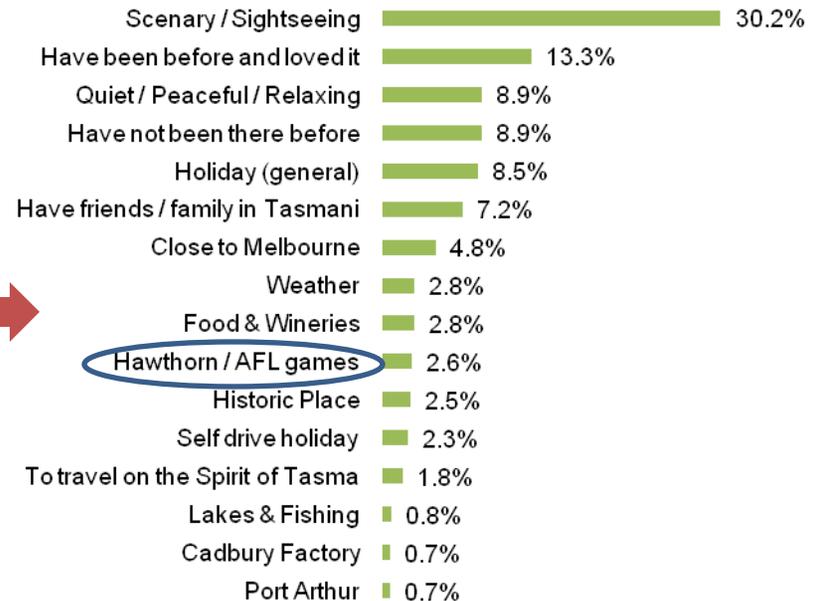
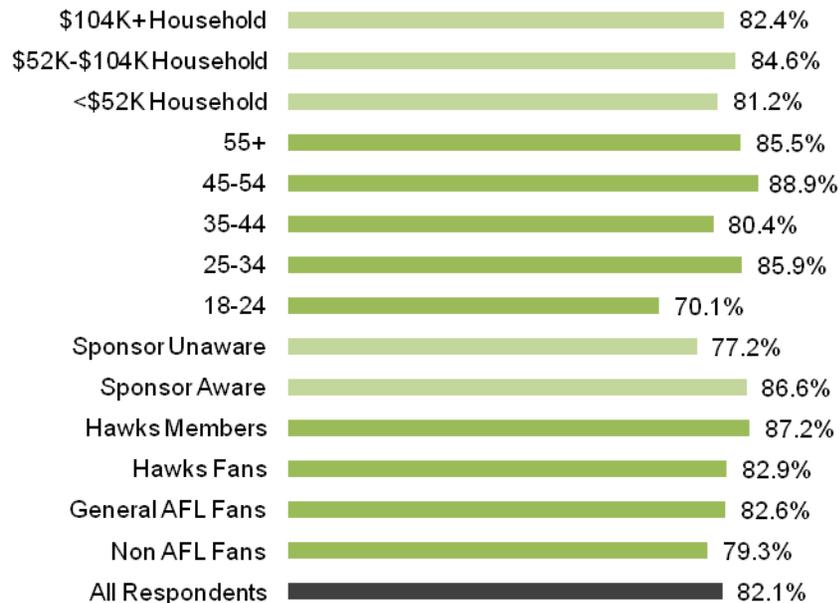
Tasmania Holiday Consideration

TASMANIA CONSIDERATION

82% of all respondents stated consideration for Tasmania as a holiday destination in the future, the same level recorded in 2007. In contrast to 2007 results, respondents with an interest towards AFL display a greater consideration towards the state, than those with no interest in the sport. Hawks members continue to display the most consideration.

REASONS FOR CONSIDERATION

Scenery and sightseeing remains the major driver in Tasmania consideration, increasing from 24% in 2007. Visiting for the purpose of AFL games has remained consistent year on year, however it is again Hawthorn members who are most inclined to travel for this reason (13% recall).



Question: Would you consider Tasmania as a future holiday destination? What would be the reason for considering Tasmania?
Base: All respondents (n=610) ; all respondents considering Tasmania (n=501)

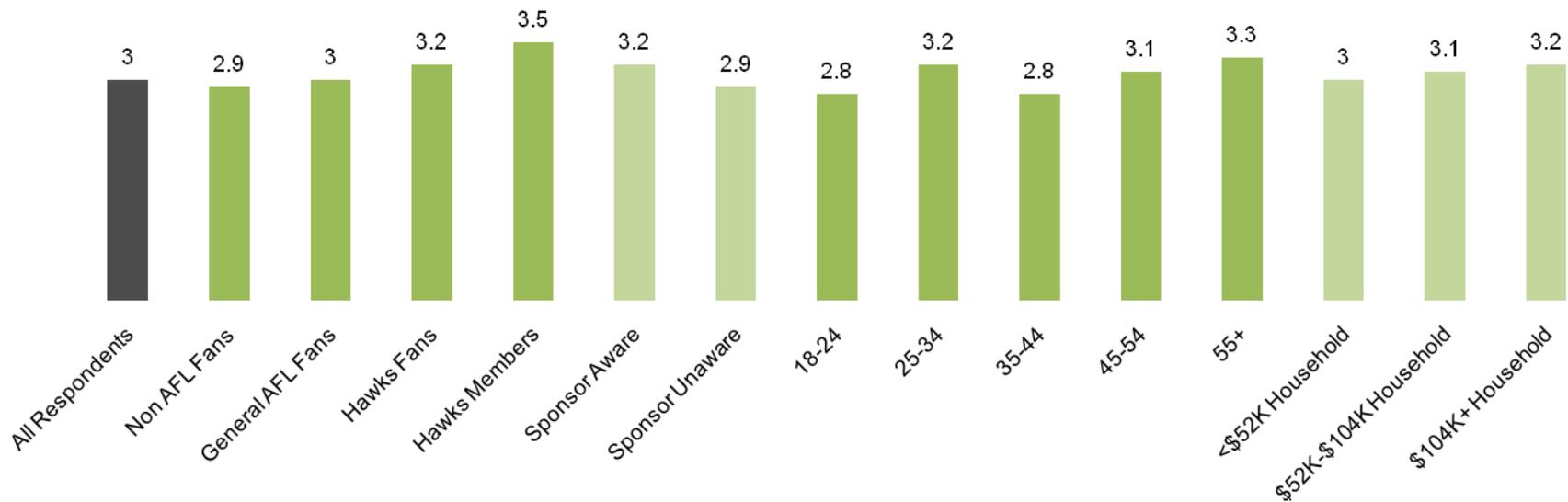
Tasmania Consideration – Next 12 Months

MEAN RATING

1 in 3 of all respondents stated they would be 'likely' or 'very likely' to travel to Tasmania in the next 12 months – 29% non AFL fans, 31% general AFL fans and 43% all Hawks supporters.

Respondents aware of the sponsorship display a greater likeliness to travel than those with no awareness of the sponsorship.

Likelihood of Tasmania Travel in Next 12 Months - Mean Rating (1-5/5)

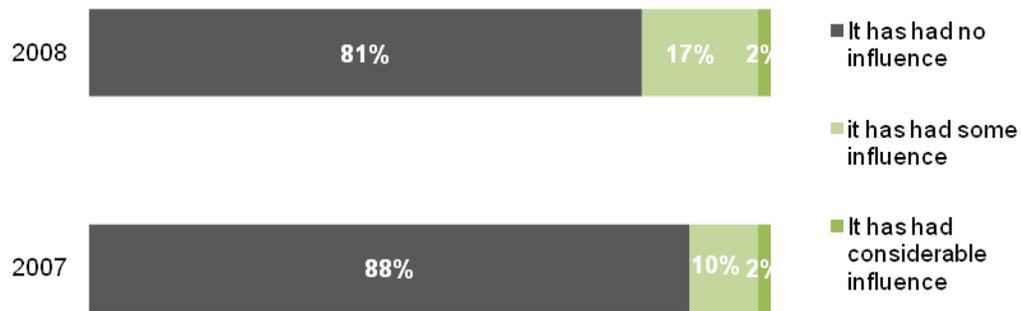


Question: How likely are you to visit Tasmania for a holiday in the next 12 months? Scale 1 – very unlikely to 5 – very likely

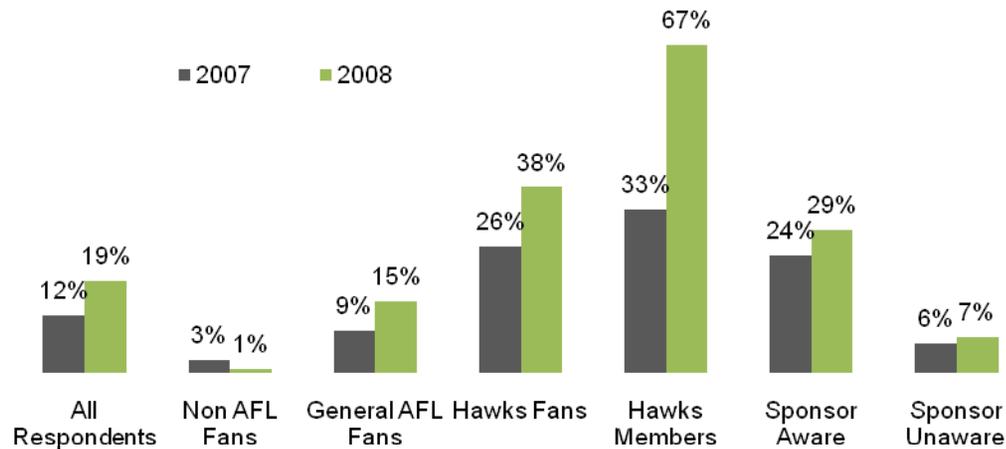
Base: All respondents (n=610)

Sponsorship Impact on Tasmania Consideration

Year on Year Comparison - All Respondents



Net 'Positive Influence'



SPONSORSHIP INFLUENCE ON TRAVEL

A significant increase in consideration as a result of Tasmania's sponsorship has been recorded in 2008.

19% of all respondents stated the sponsorship has had at least some influence on their consideration for Tasmania as a destination, up from 12% in 2007.

The greatest influence has been had on Hawks members – 2 times greater than that recorded in 2007. Distinct levels of sponsorship influence have also been established among general Hawks and AFL fans in 2008.

Question: To what extent has Tasmania's sponsorship of Hawthorn FC influenced your decision to visit Tasmania in the future?
Base: All respondents (n=610)

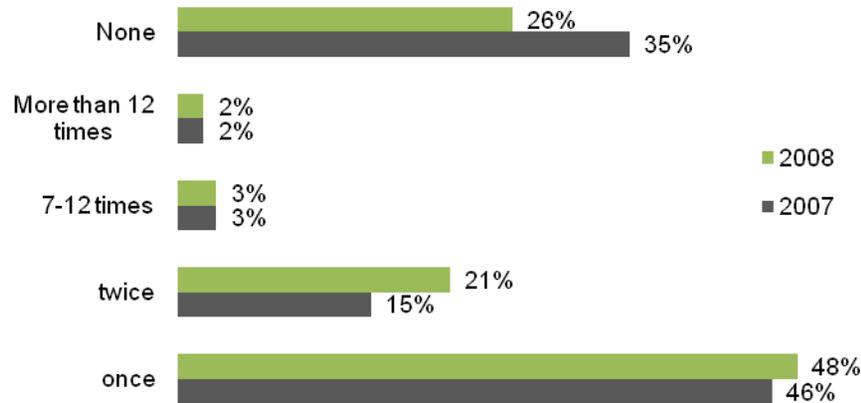


Research Findings:

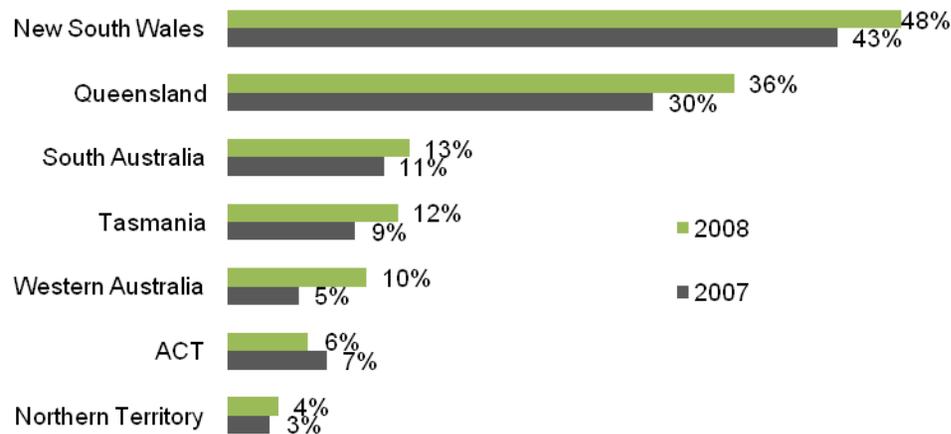
Stage 5 – Tasmania Travel

Interstate Travel

Interstate Travel Last 12 Months



States Visited



INTERSTATE TRAVEL LAST 12 MONTHS

Close to 3 in 4 respondents (74%) in 2008 had travelled interstate in the last 12 months, up from 65% in 2007. 88% of all Hawks supporters had travelled interstate, 74% general AFL fans and 67% non AFL fans.

STATES VISITED

Of those who had travelled recently, NSW proved to be the main destination, ahead of QLD.

12% of respondents had visited Tasmania, up from 9% in 2007.

18% of Hawks members had visited the state, while 16% of respondents aware of the Tasmania sponsorship had visited (12% in 2007) – with only 8% among those unaware of the sponsorship (7% in 2007).

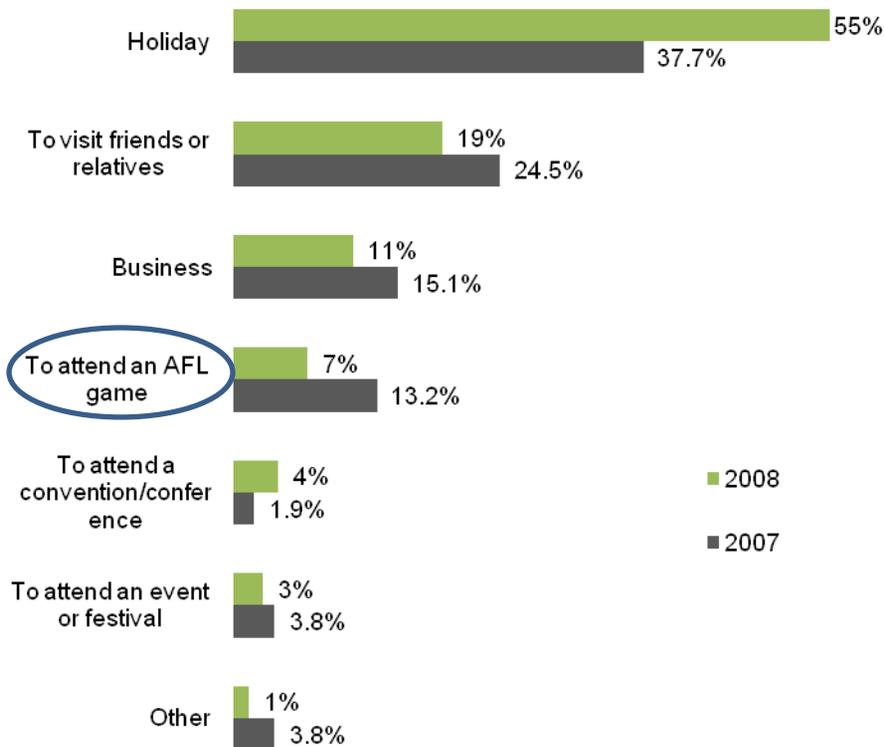
Question: Approximately how many times in the last 12 months have you travelled interstate? Which states / territories did you visit?

Base: All respondents (n=610) ; interstate travellers (n=452)

Tasmanian Travel

NO. VISITS TO TASMANIA IN LAST 12 MONTHS

Of those who travelled to Tasmania, 71% visited just the once. 7% of respondents had visited 4 or more times in the last 12 months.



PRIMARY REASON FOR MOST RECENT TRIP

A sharp increase has been recorded towards 'holidays' as the primary purpose for travelling to Tasmania, up from 38% in 2007 to 55% in 2008.

In contrast, 'attending AFL games' has declined year on year, down from 13% to 7%.

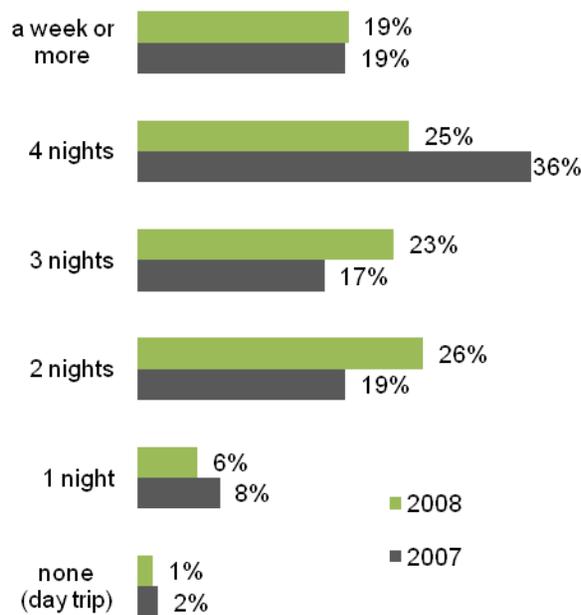
22% of Hawks fans stated attending AFL games as their primary reason for travel, however also down on 2007 results (32% in 2007).

Question: No. trips in last 12 months? Reason for most recent travel to Tasmania?
Base: All respondents who had visited Tasmania (n=73)

Tasmanian Travel

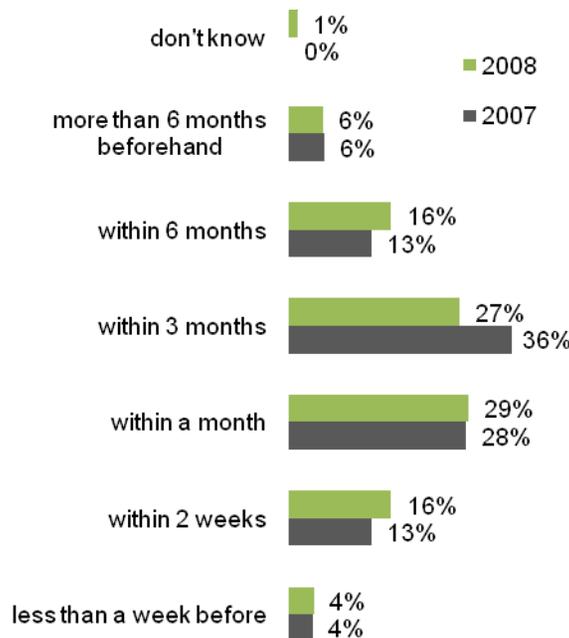
LENGTH OF MOST RECENT STAY

75% of respondents stayed between 2 – 4 nights on their most recent trip to Tasmania, slightly above 2007 results.



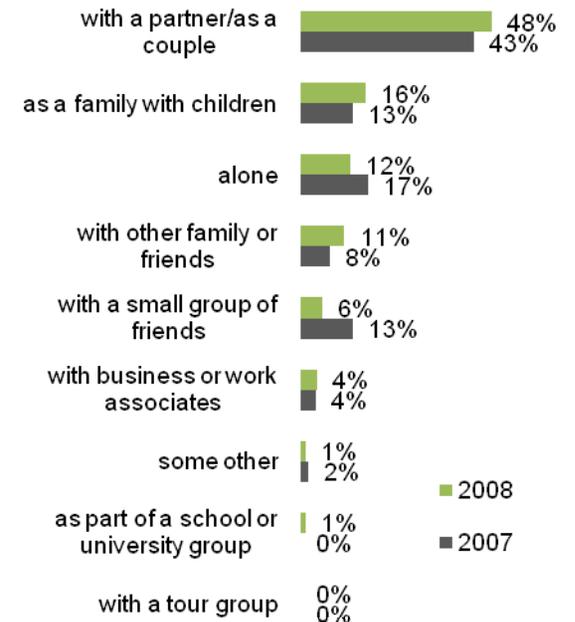
TIME DECIDED TO TRAVEL

The major share of visitors to Tasmania are likely to decide on their travel plans 1 – 3 months in advance.



TRAVELLING COMPANIONS

Visitors to Tasmania are most likely to travel with a partner, ahead of families and groups.



Question: Length of most recent stay? When was decision made to book most recent trip? Who did you travel with?
Base: All respondents who had visited Tasmania (n=73)

Repucom Exposure Analysis

Part III – Economic Benefits & Direct Expenditure

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	Appendix A Model Assumptions and Inputs	13

1 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 second year of the sponsorship arrangement, particularly with regard to the social and economic benefits to the State. To this end, it has commissioned Repucom to deliver an analysis, with the economic impact to be determined by PricewaterhouseCoopers (PwC).

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.

Structure of this report

This report is set out as follows:

- Chapter 2 outlines the methodology for modelling of economic impacts and assesses the quantitative outcomes; and
- Chapter 3 summarises the primary socio-economic outcomes of the of the sponsorship package.

2 Analysis of economic impacts

About this chapter

This chapter provides an economic evaluation of the match component of the Tasmanian Government's sponsorship of the HFC during 2008.

The purpose of the analysis is to quantify, where possible, the impacts of the five matches played in Tasmania in 2008. The evaluation focuses on quantifying the economic impacts of interstate tourism and associated spending generated by the matches.

Methodology

To determine the economic impacts of the five matches in terms of additional tourism and associated expenditure, a standard input-output approach has been adopted.

Input-output analysis considers the flow on effects for output growth resulting from expenditure or consumption. The output is estimated using a series of integrated multipliers¹ which trace the relationship between the transactions of various industries in the economy. The analysis summarises all the economic responses, both direct and indirect, resulting from a change in the economic system – in this case, additional tourism and associated expenditure as a result of the five matches played in Tasmania in 2008.

Three outcomes have been modelled by the input-output analysis in relation to the economic impacts of the Tasmanian Government's match sponsorship of the HFC during 2008. These are the:

- Total output impact of additional tourism and associated expenditure;
- Value added impact of additional tourism and associated expenditure; and
- Employment impact of additional tourism and associated expenditure.

The key assumptions in modelling the economic impact of the matches were established from market research undertaken at two of the HFC games at Aurora Stadium in Tasmania during 2008. Details on the model and inputs are presented in Appendix B.

It should be noted that the analysis considers the impact on the Tasmanian economy in 2008 only. As such, the long term impacts may be higher.

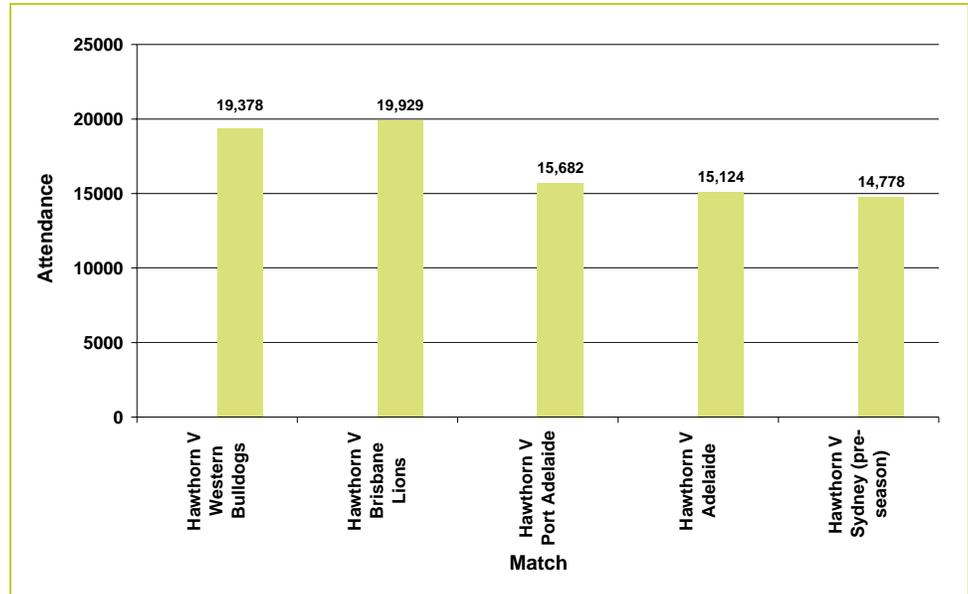
¹ Australian Bureau of Statistics, 2008, '5209.0 - Australian National Accounts: Input-Output Tables', 1996-97

Analysis inputs

Attendance

The one pre-season and four HFC home games played at Aurora Stadium in 2008 attracted close to 85,000 spectators, with per game attendance averaging close to 17,000.² Summarised in Figure 2.1 is the attendance per game for 2008.

Figure 2.1: Attendance at HFC home games played in Tasmania 2008



Source: FootyWire, <http://www.footywire.com/afl/footy/tg-hawthorn-hawks>

Analysis of the survey data shows that:

- Approximately 30 per cent of attendances were from interstate; and
- Of these, approximately 90 per cent stated that the football match was their main purpose for travelling to Tasmania.

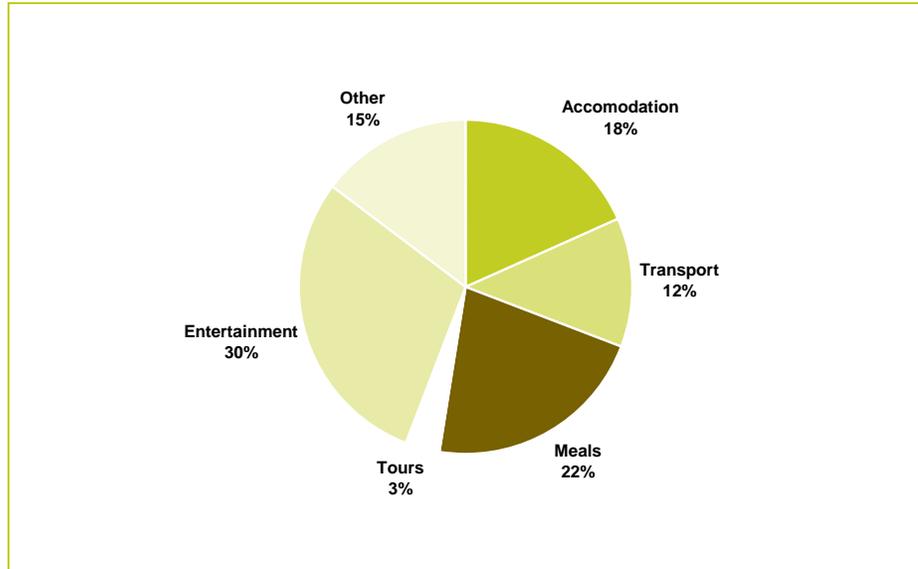
This equates to approximately 24,000 additional tourists to Tasmania in 2008 as a direct result of the Tasmanian Government's match sponsorship.

² FootyWire, <http://www.footywire.com/afl/footy/tg-hawthorn-hawks>

Visitor spending

The survey data indicated that on average, interstate visitors spent \$220 per day on goods and services including accommodation, transport, meals, tours, entertainment and other expenditure. Shown in Figure 2.2 is how the expenditure on these goods and services was proportioned.

Figure 2.2: Interstate visitor expenditure by category



Economic impacts of the five matches

Economic output impact of additional tourism and associated expenditure

To measure the economic output impact of the five matches played in Tasmania in 2008, an output multiplier analysis has been used. The output multiplier provides a measure of the total economic activity created directly and indirectly from the Tasmanian based matches.

The inputs for the analysis are based on additional tourist spend in Tasmania from the estimated 23,768 tourists as a result of the matches. As shown in Figure 2.3, the total gross economic outputs generated from additional tourism spend as a result of the Government's match sponsorship is over \$32.3 million in 2008.

This includes almost \$17.0 million in direct expenditure by interstate tourists on goods and services including, accommodation, transport, meals, tours, entertainment and other expenditure and over \$15.0 million in indirect economic output as a result of expenditure by interstate tourists.

Figure 2.3: Gross economic impact of additional tourism and associated expenditure

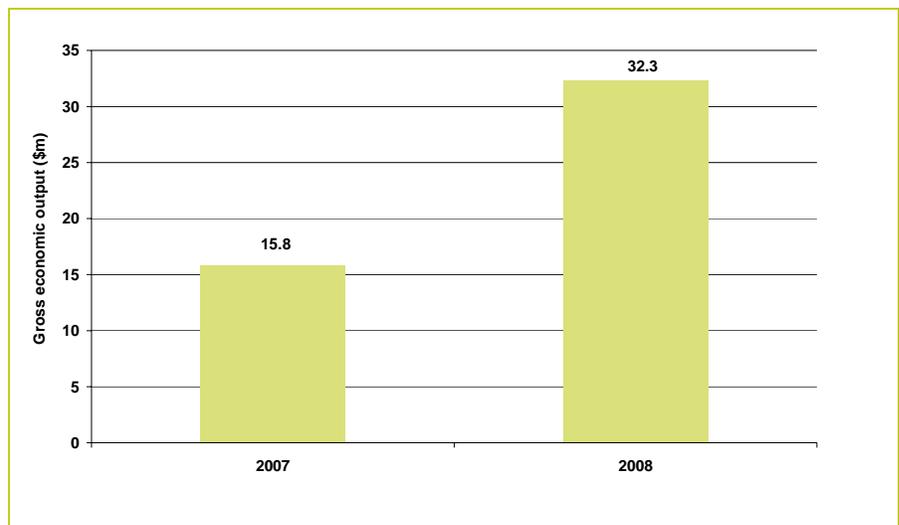
	Direct output (\$)	Indirect output (\$)	Total output (\$)
Accommodation	3,047,640	2,880,020	5,927,661
Transport	2,031,760	1,920,013	3,951,774
Meals	3,724,894	3,520,025	7,244,919
Tours	507,940	441,400	949,340
Entertainment	5,079,401	4,419,079	9,498,479
Other	2,539,700	2,207,000	4,746,700
Total economic activity	16,931,336	15,387,537	32,318,873

A comparison of economic output in 2007 and 2008 shows a positive and increasing trend. As shown in Figure 2.4, gross economic output has increased significantly from 2007 where it was \$15.8³ million to \$32.3 million in 2008.

The increase in economic output from 2007 is driven by two factors:

- a higher proportion of visitors coming from interstate (approximately 20 per cent in 2007 and approximately 30 per cent in 2008); and
- a higher proportion of interstate tourists coming to Tasmania with the football being their first priority (70 per cent in 2007 and approximately 90 per cent in 2008).

Figure 2.4: Two year comparison – Gross economic output of additional tourism and associated expenditure



³ In 2008 dollars

Value added impact of additional tourism and associated expenditure

To measure the value added to the Tasmanian economy from the five matches played in Tasmania in 2008 a value added multiplier analysis has been used. The value added multiplier 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 analysis indicates that expenditure by interstate visitors to the HFC Tasmanian home games provided approximately \$15 million of value add to the State in 2008. Of this, nearly \$8 million was a direct impact and over \$7 million occurred as an indirect effect.

Figure 2.5 below provides a break-down of this value add by expenditure category and direct and indirect impacts.

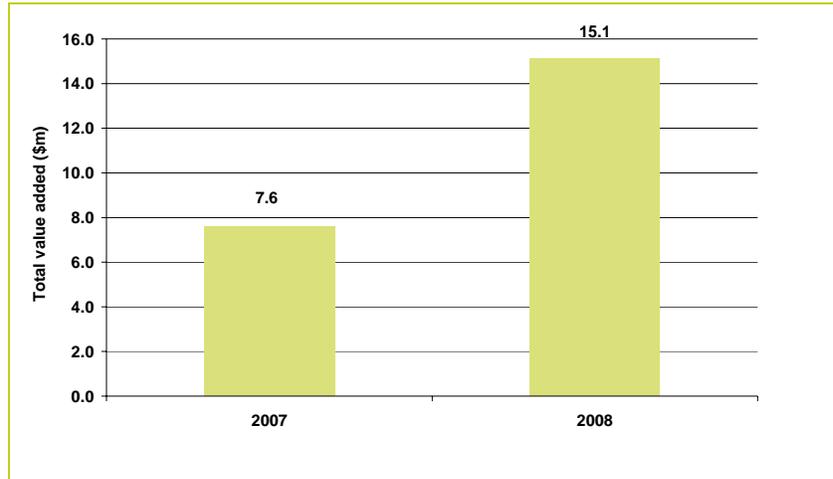
Figure 2.5: Value added to Tasmanian economy from additional tourism and associated expenditure

	Direct value added (\$)	Indirect value added (\$)	Total value added (\$)
Accommodation	1,377,533	1,347,057	2,724,591
Transport	918,356	898,038	1,816,394
Meals	1,683,652	1,646,403	3,330,055
Tours	248,891	216,890	465,781
Entertainment	2,321,286	2,148,587	4,469,873
Other	1,244,453	1,084,452	2,328,905
Total value add	7,794,171	7,341,427	15,135,598

As with gross economic output, total value added to the Tasmanian economy from the matches played has increase significantly since 2007. As Figure 2.6 below shows, total value added has increase over 100 per cent from 2007 where it was \$7.6 million⁴ to \$15.1 million in 2008.

⁴ In 2008 dollars

Figure 2.6: Two year comparison – Total value added from additional tourism and associated expenditure



Employment impact of additional tourism and associated expenditure

To measure the employment impact on the Tasmanian economy from the five matches played in Tasmania in 2008 an employment multiplier analysis has been used. The employment multiplier provides a measure of the additional employment generated from an event or activity. The employment multiplier used in this analysis calculates the additional full-time equivalent (FTE) employment positions generated as a direct result of the expenditure by interstate tourists and the employment generated as a result of the indirect economic activity generated by interstate visitor expenditure.

The analysis indicates that the interstate tourism and associated expenditure resulting from the 2008 HFC Tasmanian home games created an additional 299 FTE positions in the State.

As presented in Figure 2.7, this comprised 197 jobs as a direct result of expenditure by the additional tourists and 102 jobs as an indirect outcome.

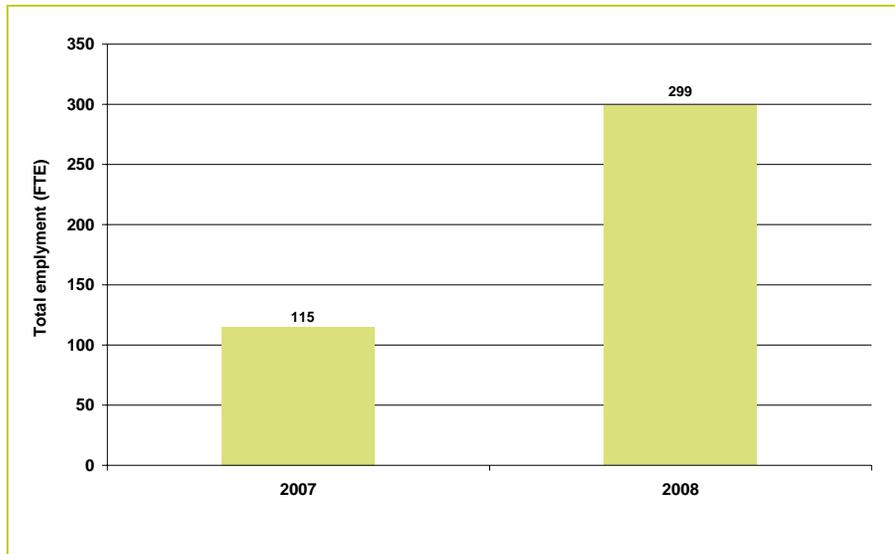
Figure 2.7: Employment impacts from additional tourism and associated expenditure

	Direct employment	Indirect employment	Total employment
Accommodation, cafes and restaurants	97	53	150
Retail trade	55	18	73
Entertainment	46	30	76
Total employment (FTE)	197	102	299

As could be expected given the increase in gross economic value and total value added from 2007, total employment has also increased significantly in 2008.

Figure 2.8 shows that in 2008, economic activity generated from the five HFC matches played in Tasmania is likely to have created an additional 299 positions of employment (FTE). This is over 100 per cent higher than in 2007 where additional employment generated was estimated to be 115 positions⁵ (FTE).

Figure 2.8: Two year comparison – Total employment (FTE) from additional tourism and associated expenditure



⁵ In 2008 dollars

3 Analysis of social and community impacts

About this chapter

To fully understand the impact of the Tasmanian Government's sponsorship of the HFC in 2008, it is necessary to acknowledge (even if it is not possible to quantify) the impacts from a broader social and community perspective.

This chapter provides an examination of the social capital producing outcomes generated by the Government's sponsorship of the HFC. The analysis centres on the impacts on Tasmania in 2008, and it is recognised that some impacts may be longer term in nature and are thus not accounted for in this analysis.

Social capital analysis

What is social capital?

The Organisation for Economic Cooperation and Development (OECD) defines social capital as the norms and networks that facilitate joint and other collaborative actions for social and economic gains.⁶ Social capital has received a notable rise to prominence in both theoretical and applied social science literature over the last two decades, attributing it to a number of aspects of community well-being. In more recent times economists have also added the focus of the contribution of social capital to economic development. The broad claim is that social capital is a productive resource that may contribute directly and indirectly to the production of economic value.⁷

PwC has developed a typology to examine the key indicators of social capital attributable to the Government's sponsorship, adapting the Australian Bureau of Statistics (ABS) Framework for Social Capital as the underlying basis of the assessment. The premise of the ABS framework is that social capital is one type of productive resource, alongside human capital, environmental capital and produced economic capital that interact within a context of cultural, political, institutional and legal conditions to contribute to a wide range of well being outcomes. Social capital resources are presented as attributes of networks and the interactions between members of the various communication exchanges or transactions.⁸

⁶ OECD, 2001; *The Wellbeing of Nations: The Role of Human and Social Capital (A Summary)*, from www.oecd.org

⁷ Bureau of Transport and Regional Economics, 2005; op cit

⁸ ABS; op cit

Indicators of social capital outcomes from the Government's sponsorship of the HFC

PwC has selected a series of indicators to present a qualitative analysis of the key aspects of social capital attributable to the Government's sponsorship. The included indicators are not intended to be a definitive set of measures for social capital outcomes attributable to the sponsorship, but to allow a high level qualitative analysis.

The indicators are:

- **Cooperation** – Shared or complimentary action or sense of purpose to achieve goals. For example, water conservation initiatives.
- **Social participation** – Participation in enjoyed activities, involving the interaction with others in either formal or informal settings.
- **Economic participation** – Social networks or relationships through which people engage in activities of an economic nature. These may include participation in the labour force, business networks or use of local business, for example.
- **Network frequency/intensity and communication mode** – Frequency of contact between individuals or groups within social networks and the methods and modes of communication.
- **Integration into the community** – The acceptance and inclusiveness of a community, including the capacity to welcome newcomers/new network members; the capacity of a community to provide adequate services and facilities that enable newcomers/those outside the networks to communicate and integrate into the community.
- **Sharing knowledge, information and introductions** – The formal and informal exchange and sharing of information and skills between individuals and members of a community or group.

Using this framework, the sponsorship agreement has been assessed by the extent to which it has effectively facilitated or created a positive outcome against each framework element. The analysis considers direct impacts, and excludes indirect or secondary outcomes.

Results

A summary of social capital outcomes is contained in Figure 3.1, and described in detail in the following section.

Figure 3.1: Social capital outcomes of the Tasmanian Government's sponsorship of the HFC

Social capital framework element	Impact of sponsorship on achieving the social capital outcome
Cooperation	
Social participation	
Network frequency/intensity and communication mode	
Economic participation	
Integration into the community	
Sharing knowledge, information and introductions	

 High
  Moderate
  Low

These results can be explained as follows:

Economic participation

- The matches have provided direct additional employment opportunities for Tasmania. Participation in the workforce enhances social networks and relationships.
- Employment opportunities can attract new people to regions, and provide an incentive for local populations to remain.
- New business development, employment creation and the interaction with existing business and local communities increases the size of social and business networks.

Social participation

- The five HFC matches played in Tasmania in 2008 leads to greater local participation in these activities. Participation included factors such as match attendance, voluntary activities to facilitate the staging of matches, and social activities related to attendance at the matches.

Cooperation

- The staging of the matches at Aurora Stadium depended on a range of voluntary and paid work tasks taking place. This included participants from the football clubs, local council, Stadium and local community.

Network frequency/intensity and communication mode

- The matches provided for regular networking opportunities amongst friends and acquaintances.

Community support

- New or enhanced tourism attractions, and the additional visitation they attract, provide new opportunities for businesses the service tourists, or which provide supplies to tourism assets.

Sharing knowledge, information and introductions

- Hosting regular AFL games at Aurora Stadium leads to greater local participation in these events. This provides local workers and business people with exposure to new ideas and experiences, thus providing an opportunity for local employees to gain new skills and knowledge.
- New facilities and employment opportunities as a result of hosting the matches may increase the spread of new technology, systems or skills that would otherwise not have been readily available locally.

Appendix A Model assumptions and inputs

Figure A.1: 2008 attendance figures

Year	Match	Attendance
2008	Hawthorn V Western Bulldogs	19,378
2008	Hawthorn V Brisbane Lions	19,929
2008	Hawthorn V Port Adelaide	15,682
2008	Hawthorn V Adelaide	15,124
2008	Hawthorn V Sydney (pre-season)	14,778
Average		16,978

Figure A.2: Survey findings

Year	Match	Attendance	Sample size	% of attendance from interstate	% of attendance who went to TAS with match as first priority	Interstate attendance	Attendance with match as first priority	Spend per person (\$)	Average nights
2008	Hawthorn V Western Bulldogs	19,378	250	0.344	0.90	6,666	6,079	216.77	3.5
2008	Hawthorn V Brisbane Lions	19,929	292	0.27	0.92	5,381	4,907	222.95	3.0
Average (2 games)			271	0.307	0.912	6,023	5,493	219.86	3.2
Average (using total attendance =84,891)				0.307	0.91	26,062	23,768	219.86	3.240
Total income from football*		\$16,931,336							

* Calculation = Total attendance x % of attendance from interstate x % of attendance with match as first priority x spend per person x average nights

Figure A.3: Spending by category

Category	Spending (\$)			% of spend
	H v WB	H v BL	Average	
Accommodation	2.93	323.14	163.03	18.00%
Transport	124.49	98.42	111.45	12.00%
Meals	187.52	199.43	193.48	22.00%
Tours	27.97	32.91	30.44	3.00%
Entertainment	118.89	408.49	263.69	30.00%
Other	139.26	123.16	131.21	15.00%
Total	528.92	560.93	544.93	
Average number of people	2.44	2.52	2.48	
Average total per person	216.77	222.95	219.86	

Figure A.4: Total spending (5 games) proportioned

Category	Spending (\$)
Accommodation	\$3,047,640
Transport	\$2,031,760
Meals	\$3,724,894
Tours	\$507,940
Entertainment	\$5,079,401
Other	\$2,539,700
Total	\$16,931,336

Figure A.5: Multipliers used in the analysis

Spend	Industry Classification	Direct Multipliers			Indirect Multipliers			Total Multipliers		
		Employment	Output	Value Added	Employment	Output	Value Added	Employment	Output	Value Added
Accommodation	5701 Accommodation, cafes & restaurants	11.00	1.00	0.45	6.00	0.95	0.44	17.00	1.95	0.89
Transport	5701 Accommodation, cafes & restaurants	11.00	1.00	0.45	6.00	0.95	0.44	17.00	1.95	0.89
Meals	5701 Accommodation, cafes & restaurants	11.00	1.00	0.45	6.00	0.95	0.44	17.00	1.95	0.89
Tours	5101 Retail trade	18.00	1.00	0.49	6.00	0.87	0.43	24.00	1.87	0.92
Entertainment	9301 Sport, gambling etc	9.00	1.00	0.46	6.00	0.87	0.42	15.00	1.87	0.88
Other	5101 Retail trade	18.00	1.00	0.49	6.00	0.87	0.43	24.00	1.87	0.92

Figure A.6: Multiplier analysis results

Spend	Industry Classification	Direct Effects			Indirect Effects			Total Effects		
		Employment (FTE)	Output (\$'000)	Value Added (\$'000)	Employment (FTE)	Output (\$'000)	Value Added (\$'000)	Employment (FTE)	Output (\$'000)	Value Added (\$'000)
Accommodation	5701 Accommodation, cafes & restaurants	34	3,047,640	1,377,533	18	2,880,020	1,347,057	52	5,927,661	2,724,591
Transport	5701 Accommodation, cafes & restaurants	22	2,031,760	918,356	12	1,920,013	898,038	35	3,951,774	1,816,394
Meals	5701 Accommodation, cafes & restaurants	41	3,724,894	1,683,652	22	3,520,025	1,646,403	63	7,244,919	3,330,055
Tours	5101 Retail trade	9	507,940	248,891	3	441,400	216,890	12	949,340	465,781
Entertainment	9301 Sport, gambling etc	46	5,079,401	2,321,286	30	4,419,079	2,148,587	76	9,498,479	4,469,873
Other	5101 Retail trade	46	2,539,700	1,244,453	15	2,207,000	1,084,452	61	4,746,700	2,328,905
Total		197	16,931,336	7,794,171	102	15,387,537	7,341,427	299	32,318,873	15,135,598

