



ACT
Government

Chief Minister, Treasury and
Economic Development

Freedom of Information Disclosure Log Publication Coversheet

The following information is provided pursuant to section 28 of the *Freedom of Information Act 2016*.

Application Details	
Ref. No.	2024-305
Date of Application	23 September 2024
Date of Decision	25 November 2024
Processing time (in working days)	44
Fees	Waived
Decision on Access	Partial Release
Information Requested (summary)	Copies of the economic impact reports lodged by the Canberra Raiders, the ACT Brumbies and the GWS Giants.
Publication Details	
Original application	<input checked="" type="checkbox"/> Published <input type="checkbox"/> N/A
Decision notice	<input checked="" type="checkbox"/> Published <input type="checkbox"/> N/A
Documents and schedule	<input checked="" type="checkbox"/> Published <input type="checkbox"/> N/A
Decision made by Ombudsman	N/A
Additional information identified by Ombudsman	N/A
Decision made by ACAT	N/A
Additional information identified by ACAT	N/A

From: [REDACTED]
To: [CMTEDD FOI](#)
Subject: CMTEDDFOI 2024-305 Economic impact reports
Date: Monday, 23 September 2024 12:37:45 PM

Caution: This email originated from outside of the ACT Government. Do not click links or open attachments unless you recognise the sender and know the content is safe.

Hi,

I wish to make a request to access the following documents under the Freedom of Information Act 2016.

Copies of the economic impact reports lodged by the Canberra Raiders, the ACT Brumbies and the GWS Giants as part of their financial agreements with the ACT government. I'd like the reports for the 2022/23 and 2021/22 financial years please.

I ask that the agency waive the fee associated with the application on the grounds that the subject of this request is of special benefit to the public (section 107 (2) (b) of the Act)

Should you request further information, or have any queries about this application, please do not hesitate to contact me.

Kind regards,





ACT
Government

Chief Minister, Treasury and
Economic Development

Our ref: CMTEDDFOI 2024-305



FREEDOM OF INFORMATION REQUEST

I refer to your application under section 30 of the *Freedom of Information Act 2016* (the Act), received by the Chief Minister, Treasury and Economic Development Directorate (CMTEDD) on 23 October 2024. Specifically, you are seeking:

“Copies of the economic impact reports lodged by the Canberra Raiders, the ACT Brumbies and the GWS Giants as part of their financial agreements with the ACT government. I'd like the reports for the 2022/23 and 2021/22 financial years please.”

Authority

I am an Information Officer appointed by the Director-General of CMTEDD under section 18 of the Act to deal with access applications made under Part 5 of the Act.

Timeframes

In accordance with section 40 of the Act, CMTEDD is required to provide a decision within 30 working days of the access application being received. Following on from third party consultation, the due date for a decision is **26 November 2024**.

Decision on access

Searches were completed for relevant documents and **six** documents were identified that fall within the scope of your request.

I have included as **Attachment A** to this decision the schedule of relevant documents. This provides a description of the documents that fall within the scope of your request and the access decision for each of those documents.

I have decided to grant **partial access** to all documents, as I consider them to contain information that would, on balance, be contrary to the public interest to disclose under the test set out in section 17 of the Act.

My access decisions are detailed further in the following statement of reasons and the documents released to you are provided as **Attachments B** to this letter.

In accordance with section 54(2) of the Act a statement of reasons outlining my decisions is below.

Statement of Reasons

In reaching my access decisions, I have taken the following into account:

- the Act
- the scope of your requested information
- third party consultation
- the content of the documents that fall within the scope of your request

Exemptions claimed

My reasons for deciding not to grant access to components of these documents are as follows:

Information that would, on balance, be contrary to the public interest to disclose under the test set out in section 17 of the Act

Public Interest

The Act has a presumption in favour of disclosure. As a decision maker I am required to decide where, on balance, public interest lies. As part of this process, I must consider factors favouring disclosure and nondisclosure.

In *Hogan v Hinch* (2011) 243 CLR 506, [31] French CJ stated that when ‘used in a statute, the term [public interest] derives its content from “the subject matter and the scope and purpose” of the enactment in which it appears’. Section 17(1) of the Act sets out the test, to be applied to determine whether disclosure of information would be contrary to the public interest. These factors are found in subsection 17(2) and Schedule 2 of the Act.

Taking into consideration the information contained in the documents found to be within the scope of your request, I have identified that the following public interest factors are relevant to determine if release of the information contained within these documents is within the ‘public interest’.

Factors favouring disclosure in the public interest under Schedule 2 s2.1:

(a) disclosure of the information could reasonably be expected to do any of the following:

- (ii) promote open discussion of public affairs and enhance the government’s accountability.*
- (iii) contribute to positive and informed debate on important issues or matters of public interest.*
- (iv) ensure effective oversight of expenditure of public funds.*

Having considered the factors identified as relevant in this matter, I consider that release of the information contained in these documents may reasonably be expected to promote open discussion about government operations within the community, particularly those relating to event spending and the expenditure of public funds.

Noting that the Act has an express pro-disclosure bias which reflects the importance of public access to government information, I must consider the above factors for disclosure against those factors favouring nondisclosure. However, in this case I do give some weight to the factors for disclosure.

Factors favouring nondisclosure in the public interest:

(a) *disclosure of the information could reasonably be expected to do any of the following:*

(xi) prejudice trade secrets, business affairs or research of an agency or person

Schedule 2 section 2.2(a)(xi) allows for government information to be withheld from release if disclosure of the information could reasonably be expected to prejudice the trade secrets, business affairs or research of an agency or person. The information withheld from release could reasonably be expected to unfairly prejudice the business affairs and trade secrets of several third parties, along with possible disclosure of business methodologies.

Having applied the test outlined in section 17 of the Act and deciding that release of some of the information contained in the documents is not in the public interest to release, I have chosen to redact this specific information in accordance with section 50(2). Noting the pro-disclosure intent of the Act, I am satisfied that redacting only the information that I believe is not in the public interest to release will ensure that the intent of the Act is met and will provide you with access to information held by CMTEDD within the scope of your request.

Deferred - Access to documents

Pursuant to section 38(6) of the Act, I am required to **defer access** to four of the six identified documents as the affected third parties have objected to disclosure. These third parties may apply for review of my release decision within 20 working days after my decision is published on the CMTEDD disclosure log, or a longer period allowed by the Ombudsman. I will write to you to advise when access is no longer deferred.

Charges

Processing charges are applicable for this request because the total number of pages to be released to you exceeds the charging threshold of 50 pages. However, the charges have been waived.

Online publishing – Disclosure Log

Under section 28 of the Act, CMTEDD maintains an online record of access applications called a [disclosure log](#).

Your original access application and my decision will be published on the CMTEDD disclosure log. Your personal contact details will not be published.

Ombudsman Review

My decision on your access request is a reviewable decision as identified in Schedule 3 of the Act. You have the right to seek Ombudsman review of this outcome under section 73 of the Act within 20 working days from the day that my decision is provided to you, or a longer period allowed by the Ombudsman.

We recommend using this form [Applying for an Ombudsman Review](#) to ensure you provide all of the required information. Alternatively, you may write to the Ombudsman at:

The ACT Ombudsman
GPO Box 442
CANBERRA ACT 2601

Via email: actfoi@ombudsman.gov.au

ACT Civil and Administrative Tribunal (ACAT) Review

Under section 84 of the Act, if a decision is made under section 82(1) on an Ombudsman review, you may apply to the ACAT for review of the Ombudsman decision. Further information may be obtained from the ACAT at:

ACT Civil and Administrative Tribunal
GPO Box 370
Canberra City ACT 2601
Telephone: (02) 6207 1740

<http://www.acat.act.gov.au/>

Should you have any queries in relation to your request please contact the CMTEDD FOI Team by telephone on 6207 7754 or email CMTEDDFOI@act.gov.au.

Yours sincerely



Emma Hotham
Information Officer
Chief Minister, Treasury and Economic Development
Directorate

25 November 2024



ACT
Government

Chief Minister, Treasury and
Economic Development

FREEDOM OF INFORMATION REQUEST SCHEDULE

WHAT ARE THE PARAMETERS OF THE REQUEST

Reference NO.

"Copies of the economic impact reports lodged by the Canberra Raiders, the ACT Brumbies and the GWS Giants as part of their financial agreements with the ACT government. I'd like the reports for the 2022/23 and 2021/22 financial years please."

CMTEDDFOI 2024-305

Ref No	Page number	Description	Date	Status	Reason for Exemption	Online Release Status
1	1-29	Deferred Release (s38 (6))	August 2022	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
2	30-67	2022 Canberra Raiders Economic Impact & Attendee Research Report	November 2022	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
3	68-106	Deferred Release (s38 (6))	November 2022	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
4	107-145	Deferred Release (s38 (6))	August 2023	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
5	146-188	2023 Canberra Raiders Economic Impact & Attendee Research Report	November 2023	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
6	189-226	Deferred Release (s38 (6))	November 2023	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
Total						
No of Docs						
6						



CANBERRA RAIDERS ECONOMIC IMPACT REPORT

Economic Impact & Attendee Research Report



November 2023

Project Overview

Nielsen Sports was commissioned by the Canberra Raiders to conduct a study of the Economic & Community Impact of both NRL & NRLW matches played in Canberra for the 2023 season.

The report includes:

- Gross Economic Impact to the Canberra region from the staging of 2023 Canberra Raiders NRL & NRLW home matches played in Canberra. Gross Economic Impact includes direct expenditure only.
- The Community Impact of NRL & NRLW Raiders matches is measured via overall event satisfaction of attending & changed visitor perceptions of the region amongst those who travelled to the state.
- Prompted and unprompted recall for a selection of Raiders sponsors.

Nielsen Sports was responsible for the questionnaire design, survey scripting and hosting online, data analysis and reporting. Canberra Raiders were responsible for distributing an email invitation to complete the survey to their attendee database.

At a 95% confidence interval the following sample sizes represent research accuracy to:

Survey Type	Completes	Variance
Online Survey – Main Reason Men's matches	967	+/-2%
Online Survey – Main Reason Women's matches	104	+/-5%



Executive Summary

Economic Impact

Event Experience &
Satisfaction







Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

Key Findings

 <p>EVENT SATISFACTION (ACROSS ALL MATCHES)</p> <p>7.7 -0.2 pts YOY</p>	 <p>THINK RAIDERS MATCHES ENHANCE COMMUNITY SPIRIT</p> <p>92% -2% pts YOY</p>
 <p>NET PROMOTER SCORE</p> <p>41% -3% pts YOY</p>	 <p>RECOMMEND OTHERS TO VISIT CANBERRA</p> <p>65% +2% pts YOY</p>
 <p>LIKELY TO ATTEND AGAIN</p> <p>97% -1% pt YOY</p>	 <p>ECONOMIC IMPACT</p> <p>Men \$13.0m +64% YOY</p> <p>Women \$161k</p>

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967.

Executive Summary

Economic Impact

Event Experience &
Satisfaction

Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

39,727 In-Scope Visitors to Canberra

Approximately 66% of interstate visitors who attended a Raiders match stayed overnight; equating to 26,071 visitors

Attendee Type	Total Attendees	% In scope Attendees	# In scope attendees
ACT Ticket Sales	118,505	0.00%	0
Interstate Ticket Sales	39,087	96%	37,487
Overseas Ticket Sales	912	92%	841
Total	158,504		38,328

Attendee Type	Total In Scope Attendees	In Scope Visitor Type	% Visitor Type	# Visitor Type	Accompanying Persons	Total In Scope Visitors
Interstate	37,487	Overnight	66%	24,634	1,437	26,071
		Day trippers	34%	12,734	31	12,765
Overseas	841	Overnight	100%	841	49	891
Total	38,328			38,209	1,517	39,727

26,962

Total number of In-Scope Interstate and Overseas Overnight Visitors to Canberra spending "New Money" because of a Raiders match

+

12,765

Total number of In-Scope Interstate Daytripper Visitors who also contributed to the ACT economy

=

39,727

Total number of In-Scope visitors contributing to the ACT economy

Total Economic Impact for 2023 is \$13.0m

Overnight visitors accounted for 88% of total Economic Impact value; with the remaining \$1.5 million sourced from day trippers

Attendee Type	Total In Scope Visitors	Average length of Stay	Bed nights	Average Daily Spend	In-Scope visitor Spend
Interstate Overnights	26,071	2.12	55,151	\$200.63	\$11,065,052
Interstate Day trippers	12,765	n/a	0	\$118.12	\$1,507,829
Overseas Overnights	891	2.12	1,884	\$200.63	\$377,952
Total	39,727	2.12	55,151	\$174.12	\$12,950,833

\$11,443,004

Total direct expenditure
derived from 26,962 overnight
in-scope visitors

+

\$1,507,829

Total direct expenditure
derived from 12,765 in-scope
day visitors

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967.

Economic Impact Benchmarking

All metrics observed increases compared to 2022; with total direct visitation expenditure increasing by 64%

Attendee Type	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	% Difference to 2022
Total attendance	158,504	143,358	95,391	36,121	166,708	132,163	158,998	187,857	115,549	115,298	11%
Outside of ACT attendance	39,087	33,759	23,156	8,827	46,749	36,864	44,247	52,445	21,432	17,544	16%
In Scope Visitors	38,328	32,423	25,520	8,297	43,015	34,042	40,014	50,577	20,696	16,659	18%
Overnight Split	68%	67%	67%	66%	63%	63%	66%	56%	55%	62%	1%
Ave. Length of Stay (Overnighters)	2.12	1.71	1.93	1.65	1.78	1.95	1.60	1.61	1.72	1.87	23%
Bed nights	57,035	39,014	28,258	9,584	51,236	45,953	43,200	45,950	20,270	19,879	46%
Ave. Daily Spend	\$174.12	\$146.61	\$156.38	\$143.59	\$135.64	\$135.97	\$158.24	\$171.72	\$164.60	\$205.88	19%
Direct Visitation Expenditure	\$12,950,833	\$7,900,873	\$7,325,033	\$1,913,596	\$9,951,493	\$8,548,102	\$8,476,131	\$10,846,644	\$4,456,670	\$4,900,756	64%

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey; n = 967.

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634 In-Scope Visitors to Canberra

Approximately 52% of interstate visitors who attended a Raiders NRLW standalone fixture (i.e. no Raiders NRL team playing) travelled just for the day; equating to 317 visitors

Attendee Type	Total Attendees	% In scope Attendees	# In scope attendees
ACT Ticket Sales	2,909	0.00%	0
Interstate Ticket Sales	607	100%	607
Overseas Ticket Sales	27	100%	27
Total	3,543		634

Attendee Type	Total In Scope Attendees	In Scope Visitor Type	% Visitor Type	# Visitor Type	Accompanying Persons	Total In Scope Visitors
Interstate	607	Overnight	48%	290	0	290
		Daytrippers	52%	317	0	317
Overseas	27	Overnight	100%	27	0	27
Total	634			607	0	634

317
 Total number of In-Scope Interstate and Overseas Overnight Visitors to Canberra spending "New Money" because of a Raiders match



317
 Total number of In-Scope Interstate Daytripper Visitors who also contributed to the ACT economy



634
 Total number of In-Scope visitors contributing to the ACT economy

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967.

Total Economic Impact for 2023 is \$161k

Overnight visitors accounted for 83% of total Economic Impact value; with the remaining \$27k sourced from day trippers

Attendee Type	Total In Scope Visitors	Average length of Stay	Bed nights	Average Daily Spend	In-Scope visitor Spend
Interstate Overnights	290	1.89	549	\$233.96	\$128,359
Interstate Day trippers	317	n/a	0	\$84.00	\$26,616
Overseas Overnights	27	1.89	50	\$233.96	\$6,218
Total	634	1.89	549	\$159.00	\$161,193

\$134,576

Total direct expenditure
derived from 317 overnight in-
scope visitors

+

\$26,616

Total direct expenditure
derived from 317 in-scope day
visitors

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey; n = 967.

Executive Summary

Economic Impact

**Event Experience &
Satisfaction**

Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

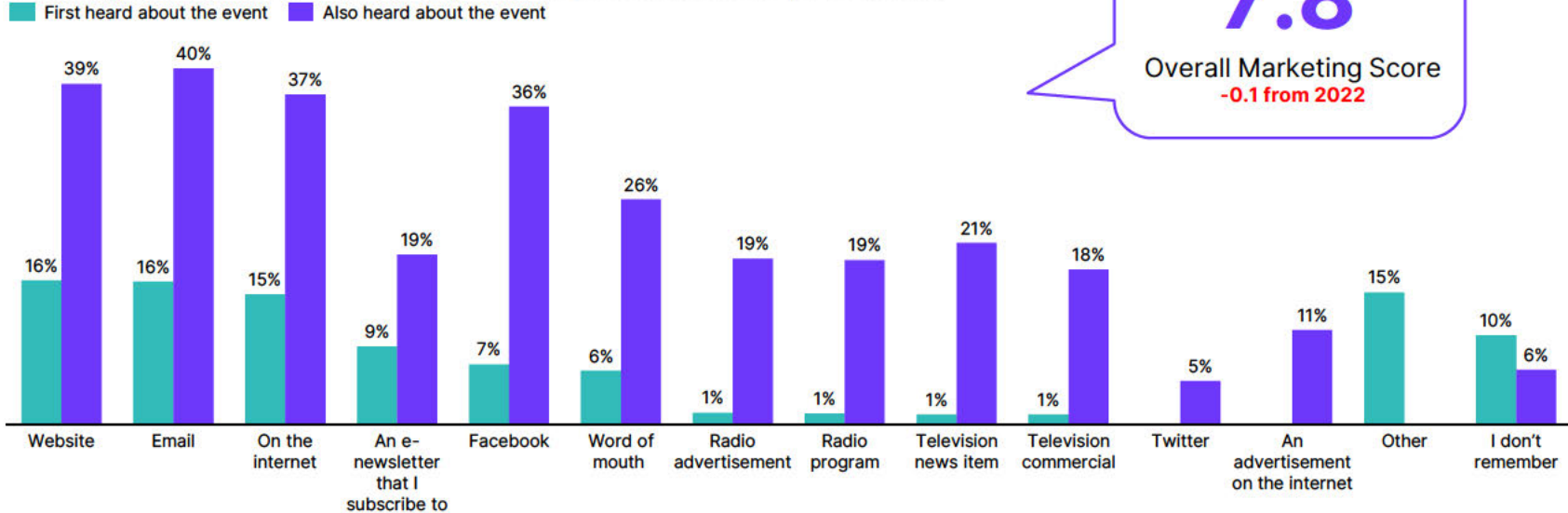
Appendix

Website & Email key drivers of awareness

Website and Email was the primary method via which respondents first heard about a given Raiders match (16% respectively); whilst Email was the channel through which respondents also heard about the event the most

Communication and Marketing Channels

"Where did you first find out and where else did you hear about the Raiders match?" | % of Attendees



Source: Canberra Raiders Attendance Survey: n = 967.

Marketing Channels YoY Comparison

The top two marketing channels observed growth in secondary awareness; with Email and Website driving overall awareness

Sources of Information for Hearing about Event

"Where did you first find out and where else did you hear about the Raiders match?"

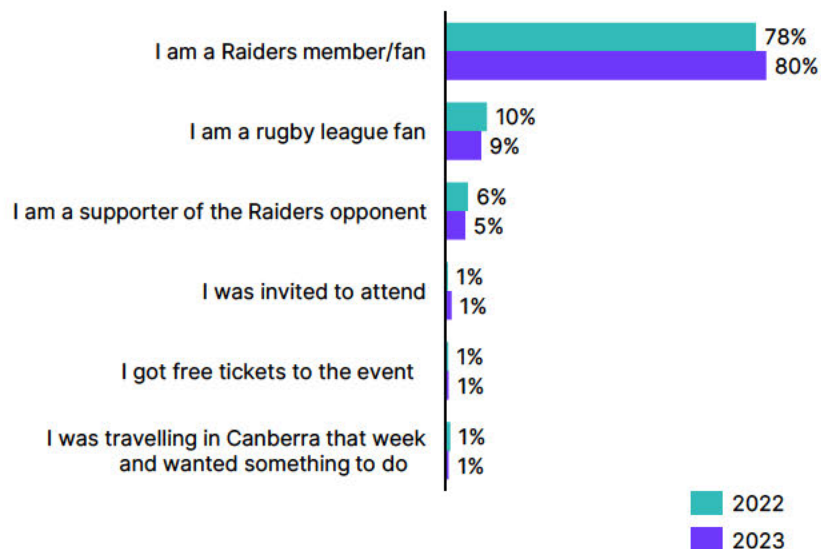
Source	First Found Out							Also heard about							Total						
	2017	2018	2019	2020	2021	2022	2023	2017	2018	2019	2020	2021	2022	2023	2017	2018	2019	2020	2021	2022	2023
Email	14%	20%	22%	30%	22%	18%	16%	35%	34%	30%	47%	28%	36%	40%	49%	54%	52%	77%	50%	56%	57%
Website	17%	19%	18%	14%	18%	15%	16%	36%	39%	31%	42%	32%	37%	39%	53%	58%	49%	55%	50%	53%	55%
On the internet	16%	15%	14%	11%	20%	16%	15%	33%	34%	29%	37%	33%	40%	37%	49%	49%	43%	48%	53%	52%	52%
Facebook	6%	6%	5%	9%	5%	5%	7%	33%	35%	37%	49%	31%	36%	36%	39%	41%	42%	58%	35%	42%	43%
Word of mouth	11%	8%	8%	7%	5%	7%	6%	34%	29%	31%	36%	28%	28%	26%	45%	37%	39%	43%	33%	34%	32%
e-newsletter	9%	10%	11%	10%	9%	5%	9%	19%	22%	19%	18%	15%	36%	19%	28%	32%	30%	28%	24%	27%	28%
TV news	1%	1%	1%	2%	2%	2%	1%	32%	26%	27%	28%	25%	19%	21%	33%	28%	28%	30%	27%	22%	22%
Radio advertisement	1%	1%	1%	1%	1%	1%	1%	19%	20%	17%	14%	23%	18%	19%	20%	21%	19%	15%	23%	22%	20%
Radio	2%	1%	1%	1%	1%	1%	1%	27%	26%	27%	25%	24%	18%	19%	29%	27%	28%	26%	26%	21%	20%
TV commercial	3%	3%	1%	1%	2%	2%	1%	26%	28%	21%	19%	21%	19%	18%	29%	31%	22%	19%	23%	19%	19%
Internet advertisement	1%	1%	0%	0%	1%	8%	0%	5%	7%	6%	4%	9%	20%	11%	6%	8%	6%	4%	10%	12%	11%
Twitter	0%	0%	1%	1%	0%	15%	0%	7%	6%	7%	10%	4%	37%	5%	7%	6%	7%	11%	5%	6%	5%

Source: Canberra Raiders Attendance Survey: n = 967.

Membership drives reasons for attending

80% of respondents stated that the reason for attending the match was because they are a member/fan; whilst 5% stated that they were a fan of the Raiders opponent

What was your main reason for attending the Raiders match?



Who did you attend with?

37%

Families, just adults

41%

Families, with children

8% aged under 5, 25% aged 6-12,
12% aged 13-18

27%

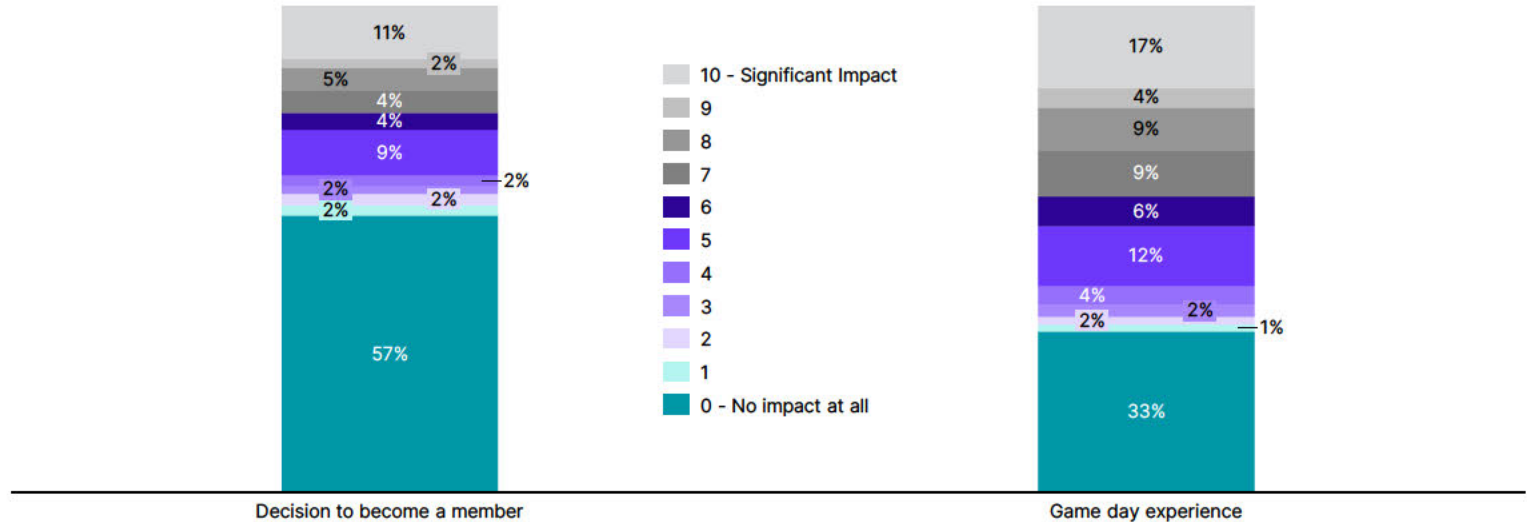
Friends

Source: Canberra Raiders Attendance Survey; n = 967.

Minimal impact from current facilities

The majority of respondents (57%) indicated that the current stadium has no impact on their decision to become a member; whilst 17% said it had a significant impact on their experience

Impact of current facility (GIO Stadium) on:
% of respondents



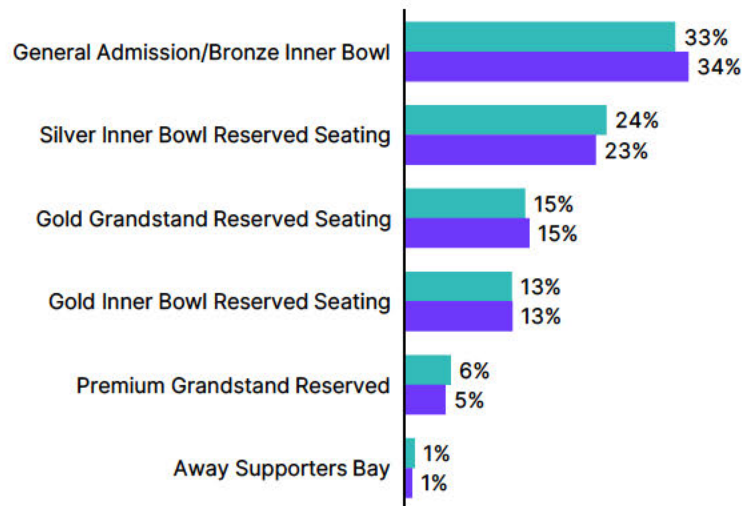
Source: Canberra Raiders Attendance Survey: n = 967.

General Admission tickets most popular

86% of respondents stated that they felt their ticket was good value for money (across all ticket types); with the majority of attendees purchasing General Admission/Bronze Inner Bowl tickets

What ticket did you purchase to attend the Raiders game?

2022 2023



% Agree value for money

86%

89%

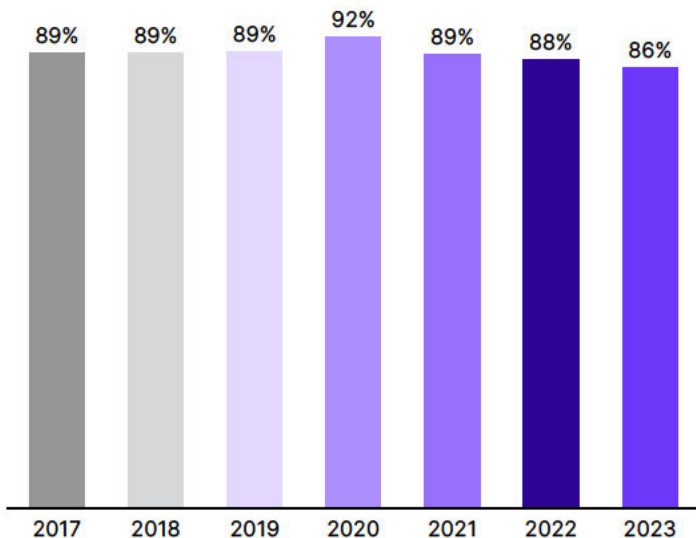
83%

87%

79%

89%

Did you feel like the ticket(s) you purchased were value for money?



Source: Canberra Raiders Attendance Survey; n = 967.

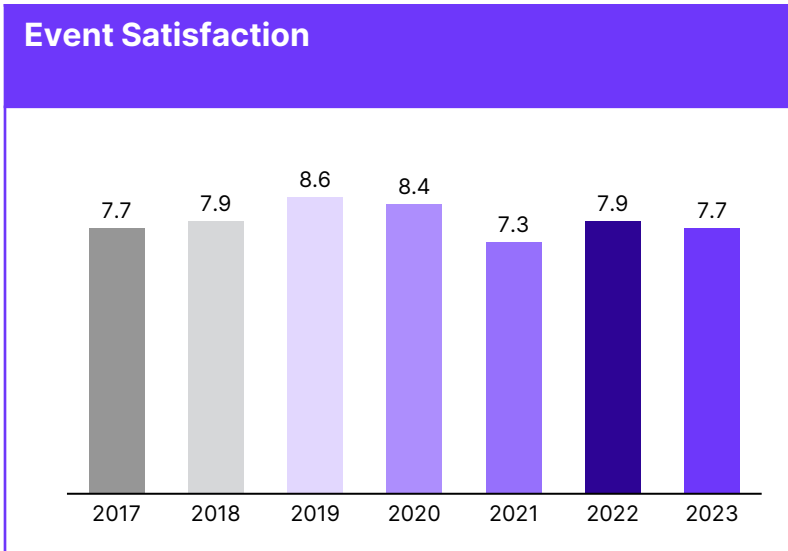
Sch 2.2(a)(xi)

97% of attendees likely to attend again

Event Satisfaction remained relatively on par with previous years; whilst the number of respondents who stated that they are likely to attend another Raiders match was 97%

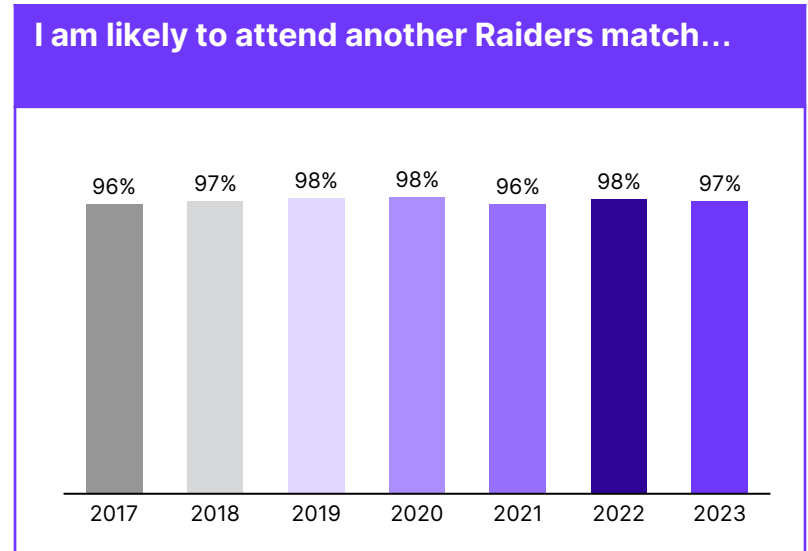
Please describe your overall level of satisfaction and enjoyment from attending your most recent Raiders match at GIO Stadium Canberra?

1 – 10 Point Scale



How likely are you to attend another Raiders match at GIO Stadium Canberra in future?

% of In-Scope respondents



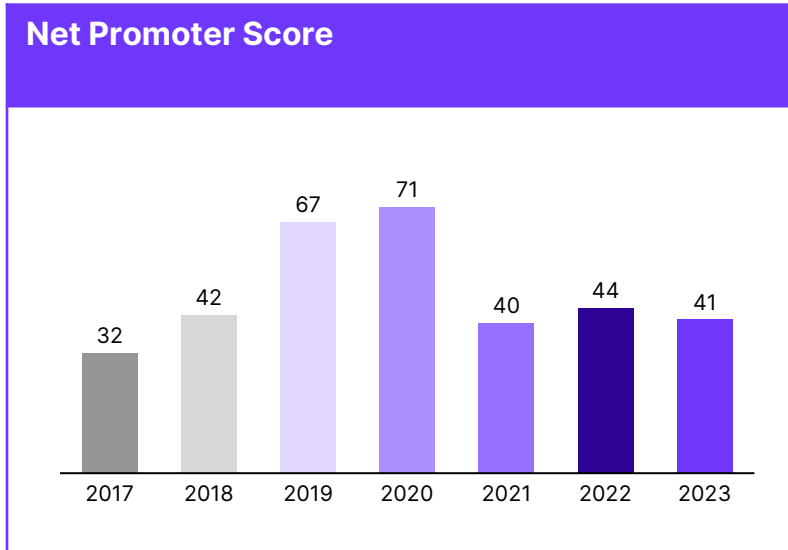
Source: Canberra Raiders Attendance Survey; n = 967.

NPS down 3 points compared to 2022

The Net Promoter Score was 3 points lower than in 2022; whilst 21% of respondents stated that the match was better than they expected; higher than in 2021

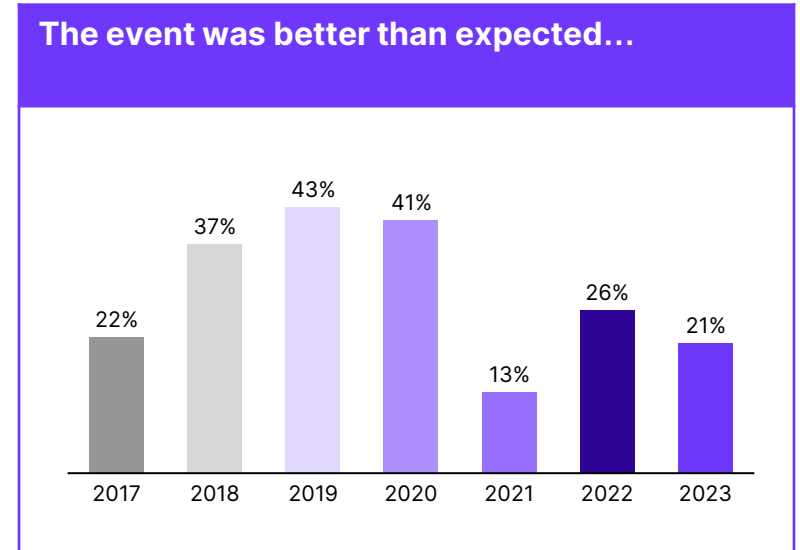
How likely are you to recommend attending a Raiders match to your friends and colleagues in the future?

1 – 10 Point Scale



After attending the most recent Raiders match, would you say that it was...

% of In-Scope respondents



Source: Canberra Raiders Attendance Survey: n = 967.

Atmosphere key driver of satisfaction

For the large majority of those who gave a positive event satisfaction score; the atmosphere and friendliness of staff were notable elements

What was the major reason for your positive satisfaction rating?

"All aspects of the day were great. The info beforehand was helpful. Merchandise staff were friendly and accommodating. Security was helpful."

"Great atmosphere. Very family friendly. Very well supervised by authorities which gives me such relief for the safety of my young children."

"Everything works smoothly from entry to exit."

What was the major reason for your negative satisfaction rating?

"I would recommend some half time entertainment to be reintroduced or at least some music playing over the speakers between plays or at half time. I think the crowd would appreciate that and it would make it a little more entertaining."

"The facilities are old and dated and parking is increasingly difficult."

"Seating wasn't perfect and food lines were incredibly long."

Key Insights:

In reviewing the responses, a few key items were noted:

- » The key drivers of positive satisfaction scores were sourced from the ease of getting around the venue and a family-friendly atmosphere
- » A minority of respondents indicated that poor facilities and parking were key reasons for a poor experience
- » Respondents noted that crowd engagement and entertainment was a big factor in their enjoyment of the match

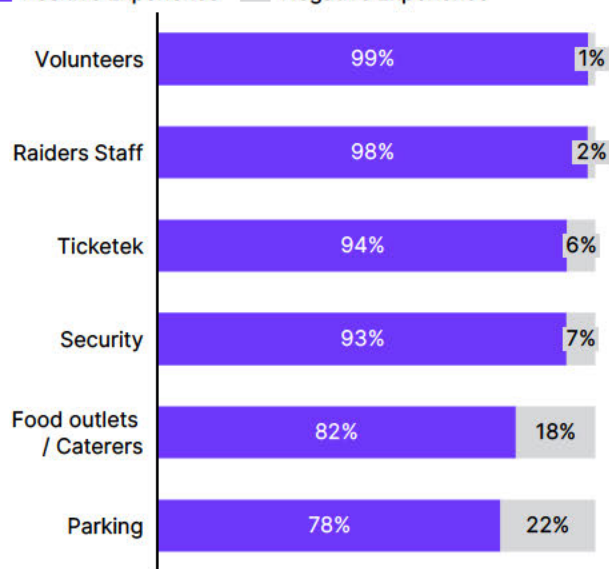
Source: Canberra Raiders Attendance Survey: n = 967.

Customer Service Experience Satisfaction ¹⁶⁶

Customer service experience satisfaction increased for Volunteers by 1 percentage point; whilst Parking remained the experience in which the most respondents had a negative experience

What level of customer service did you experience attending the match (Positive or Negative)?

Positive Experience Negative Experience



	2022	2021	2020	2019	2018	2017	2016
Volunteers	98% <i>+1% pt YOY</i>	99%	98%	99%	99%	99%	99%
Raiders Staff	99% <i>-1% pt YOY</i>	99%	98%	99%	99%	98%	98%
Ticketek	91% <i>+3% pts YOY</i>	91%	91%	94%	93%	94%	95%
Security	94% <i>-1% pt YOY</i>	93%	94%	79%	77%	81%	-
Food outlets / Caterers	84% <i>-2% pts YOY</i>	86%	86%	85%	93%	92%	91%
Parking	77% <i>+1% pt YOY</i>	82%	-	83%	81%	81%	75%



62%

of respondents stated that they would use free Wi-Fi at GIO Stadium if it was available

6.4

Connectivity Score at GIO Stadium

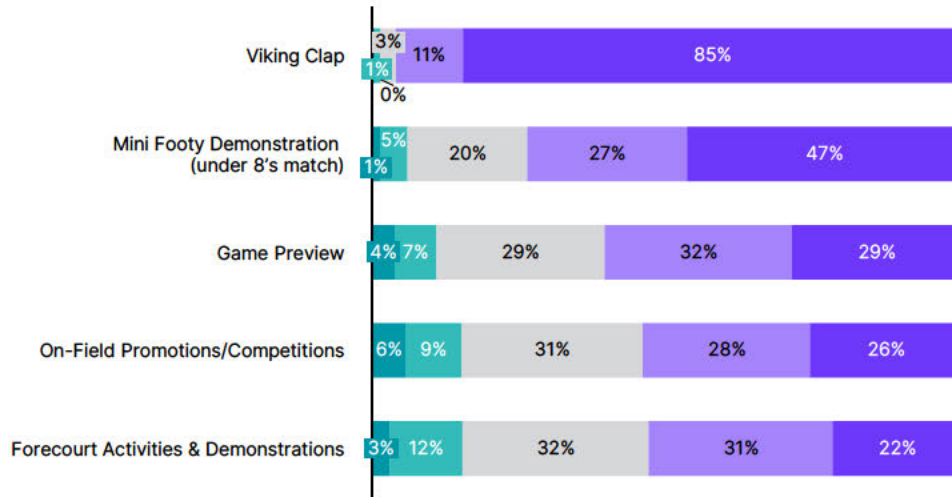
Source: Canberra Raiders Attendance Survey: n = 967.

Viking Clap popular amongst attendees

In regards to game day entertainment; 85% of respondents said that the Viking Clap was very enjoyable; whilst the Mini Footy Demonstration and Game Preview were also popular

How would you rate the following game day entertainment that you experienced?

1 - Not at all enjoyable 2 3 4 5 - Very enjoyable



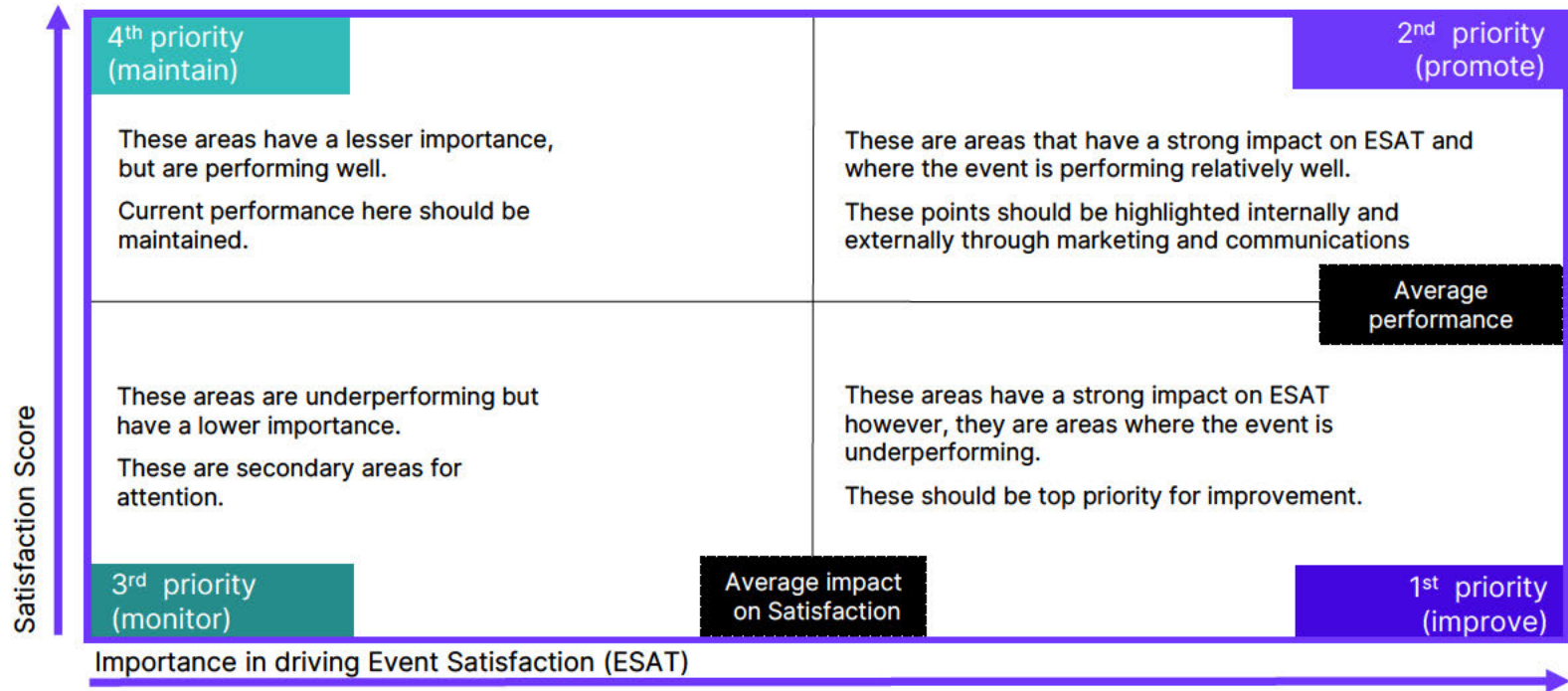
In regards to Game Day Entertainment, what can the Raiders do to make the sporting experience more enjoyable?:

- » "More member involvement."
- » "Entertainment with up-and-coming Canberra groups."
- » "It would be nice to see more players engaging with the crowd at the end of a game."
- » "Set up fan engagement zones within the stadium where fans can participate in interactive games, photo opportunities, and giveaways to keep us entertained during halftime."
- » "More wider crowd engagement rather than the one section/bay."

Source: Canberra Raiders Attendance Survey; n = 967.

Nielsen Impact Matrix

The matrix allows the Canberra Raiders to prioritise which areas should be a focus in the future



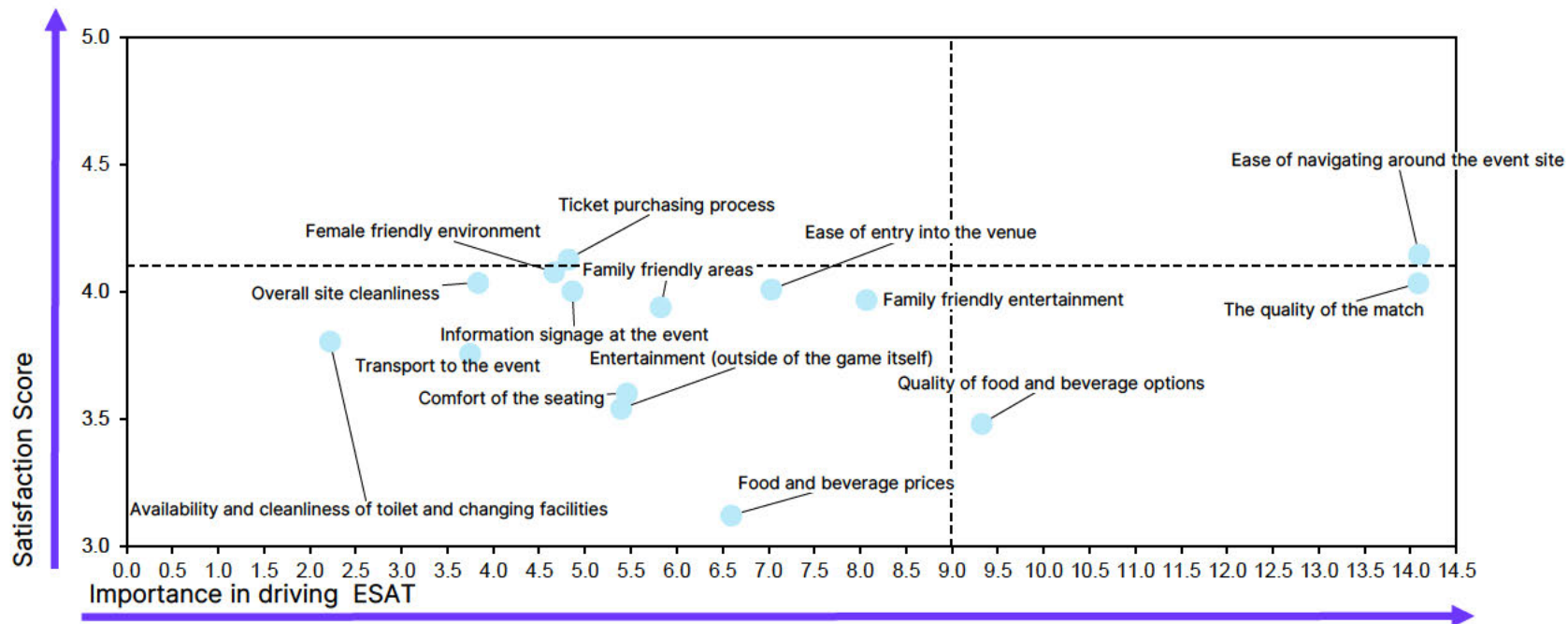
ESAT = Event Satisfaction

*Excludes those who did not experience element.

Source: Canberra Raiders Attendance Survey: n = 967.

Canberra Raiders: Nielsen Impact Matrix ¹⁶⁹

When taking into account all event elements, the ease of navigating around the event site remains the biggest driver of event satisfaction



*Excludes those who did not experience element.
Source: Canberra Raiders Attendance Survey: n = 967.

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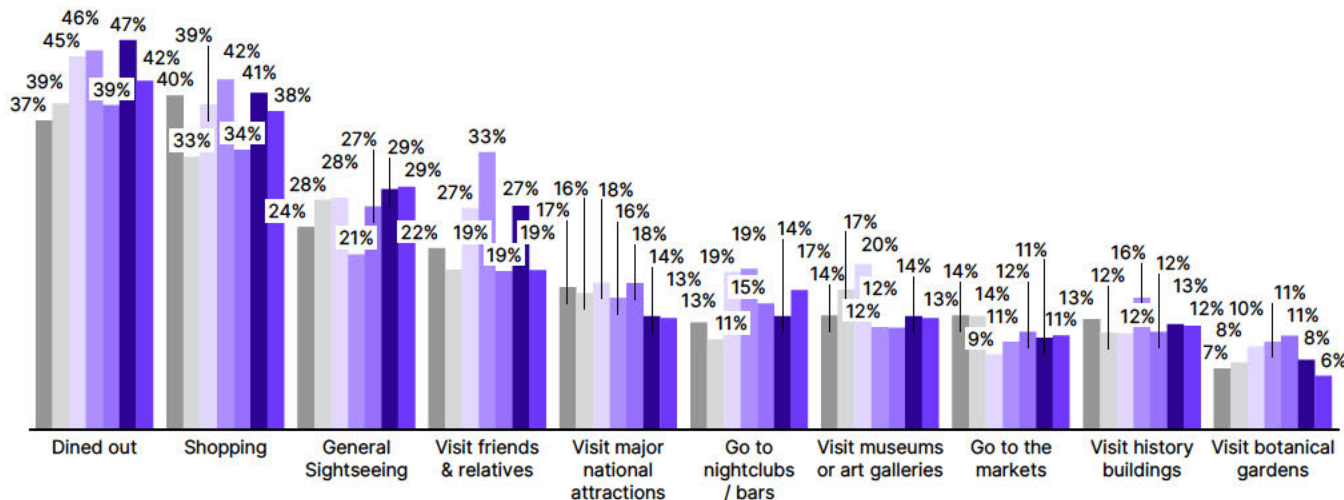
Dining and Shopping remain most popular

Dining and Shopping remaining the two most popular activities amongst respondents, with the percentage of those attending nightclubs/bars increasing by 3 percentage points YoY

What other activities did you get up to whilst in Canberra?

Top Ten

2017 2018 2019 2020 2021 2022 2023



65%

Would recommend Canberra without being asked

Up 2% pts YOY

82%

Said their experience made them want to come back and see more of Canberra

Down 2% pts YOY

12%

Perception of Canberra that has changed for the better

Down 5% pts YOY

87% said it remained unchanged

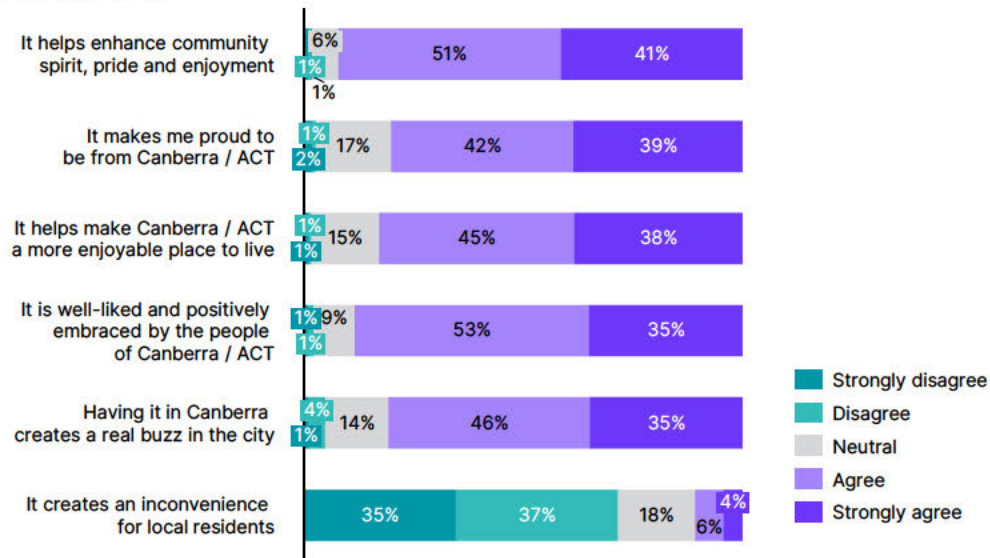
Source: Canberra Raiders Attendance Survey; n = 967. Visitors to Canberra = 329.

Community sentiment remains high

Community sentiment remained somewhat stable compared to last year; with 92% of respondents stating Raiders matches enhance community spirit, pride and enjoyment

To what extent do you agree with the following statements regarding Raiders matches in Canberra?

% Local Residents



	2023	2022	2021	2020	2019	2018	2017
It helps enhance community spirit, pride and enjoyment	92%	94%	94%	95%	94%	89%	91%
It makes me proud to be from Canberra / ACT	80%	82%	88%	90%	90%	73%	75%
It helps make Canberra / ACT a more enjoyable place to live	83%	86%	91%	89%	88%	81%	81%
It is well-liked and positively embraced by the people of Canberra / ACT	88%	93%	93%	93%	94%	80%	80%
Having it in Canberra creates a real buzz in the city	81%	84%	89%	91%	92%	75%	74%
It creates an inconvenience for local residents	11%	11%	9%	9%	8%	10%	8%

Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 638.

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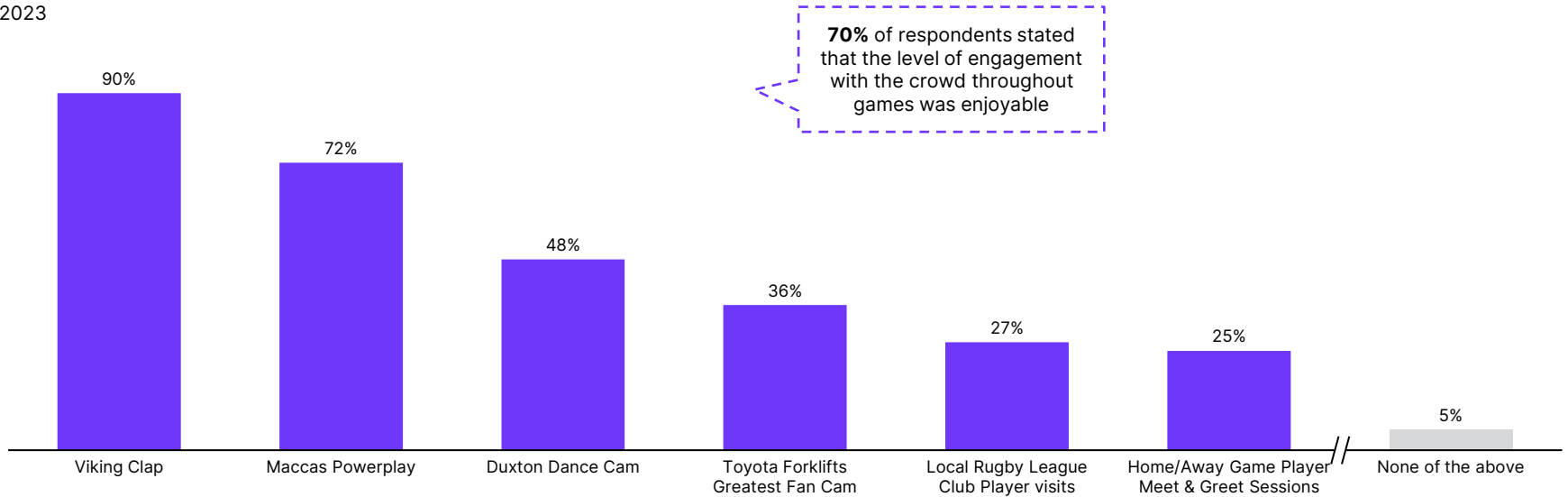
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90% of attendees aware of Viking Clap

At least a quarter of all respondents were aware of all key fan activities and initiatives, with 90% aware of the Viking Clap and 72% aware of the Maccas Powerplay

Which fan activities or initiatives are you aware of that the Raiders themselves or associated Corporate Partners ran during the 2023 season?

2023



Source: Canberra Raiders Attendance Survey: n = 967.

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ACT Sport & Recreation Key Metrics



 	Total
Survey Sample Size*	967
Economic Impact (Visitor Expenditure)	\$12,950,833
Economic Activity (Local)	\$8,374,721
Visitation	39,727
Ticketed Attendance**	158,504
Bed Nights	57,035
Ave. Visitor Length of Stay	2.12
Ave. Visitor Daily Spend	\$174.12
Ave. Local Spend per Person	\$70.67
Likelihood of Return Visit	97%
Net Promoter Score	41
Enhances community spirit, pride, & enjoyment	92%
Event Satisfaction Rating	7.7
Overall Marketing Score	7.8

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
315	201	102	12	638
\$12,950,833	\$11,065,052	\$1,507,829	\$377,952	
				\$8,374,721
39,727	26,071	12,765	891	
	39,087		0	118,505
57,035	55,151		1,884	
	2.12	0	2.12	
	\$200.63	\$118.12	\$200.63	

*Does not include out of scope visitors. **Excludes entourage.

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 638. Visitors to Canberra = 329. Note: community metrics based on all matches (men's & women's).

ACT Sport & Recreation Key Metrics

 	Total
Survey Sample Size*	104
Economic Impact (Visitor Expenditure)	\$161,193
Economic Activity (Local)	\$205,586
Visitation	634
Ticketed Attendance**	3,534
Bed Nights	599
Ave. Visitor Length of Stay	1.89
Ave. Visitor Daily Spend	\$159.00
Ave. Local Spend per Person	\$70.67
Likelihood of Return Visit	97%
Net Promoter Score	41
Enhances community spirit, pride, & enjoyment	92%
Event Satisfaction Rating	7.7
Overall Marketing Score	7.8

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
23	10	11	2	81
\$161,193	\$128,359	\$26,616	\$6,218	
				\$205,586
634	290	317	27	
	607		0	2,909
599	549		50	
	1.89	0	1.89	
	\$233.96	\$84.00	\$233.96	

*Does not include out of scope visitors. **Excludes entourage.

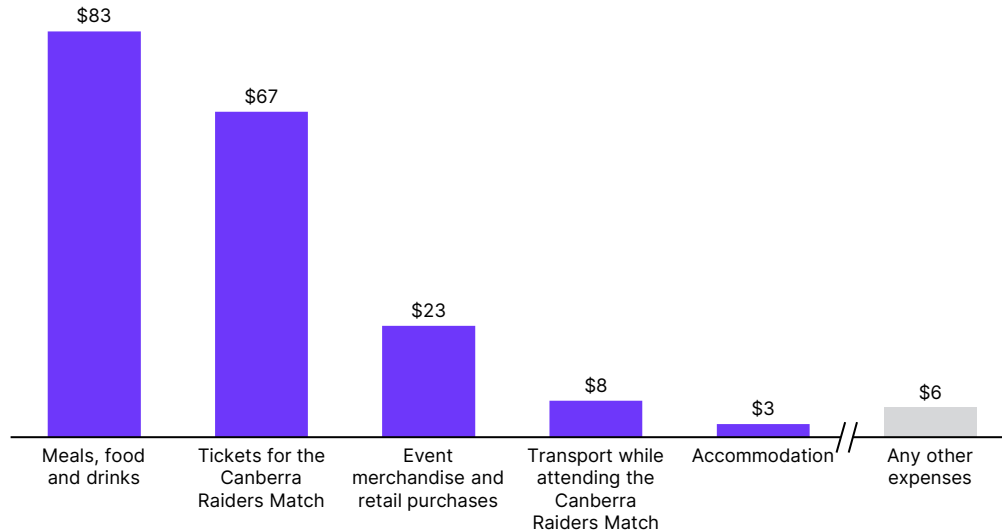
Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 81. Visitors to Canberra = 23. Note: community metrics based on all matches (men's & women's).

Local Average Spend \$71 per person

Meals, food and drinks was the main source of group expenditure among ACT residents; followed by tickets for the Raiders match

Average Local Group Expenditure as a Result of 2023 Canberra Raiders Home Games

\$ | ACT Residents



Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 638.

Local Residents

\$71

Per person expenditure

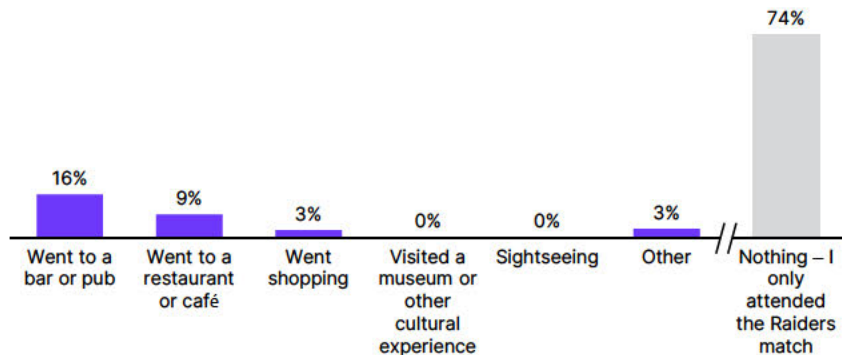
Local resident per person expenditure as a result of 2023 Raiders home games.

This is calculated based on an average group size of 2.7 people and group expenditure of \$189.

Local Perception of Raiders Match in ACT ¹⁸²

Leisure Activities whilst in ACT for Raiders Home Games

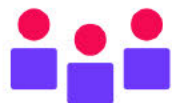
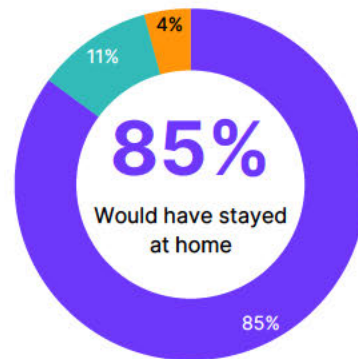
% ACT Residents



What local residents would have done instead of attending

% ACT Residents

- Stayed at home
- Something else in Canberra
- Something else outside of Canberra



98%

Of local ACT Residents believe it is **important for Canberra/the ACT to host Raiders games**



82%

Of local ACT Residents believe it is **important for the ACT Government to be involved in hosting Raiders games in the ACT**

Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 638.

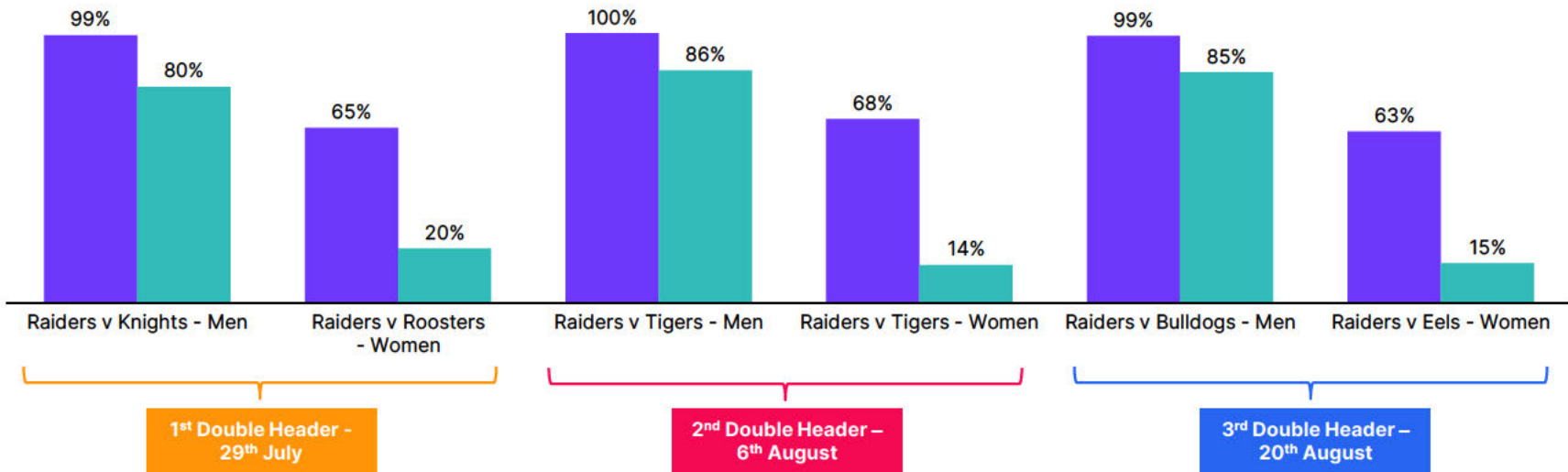
Most attending for men's match

For the first double header of the season, 80% of respondents indicated that the men's match was their main reason for attending

Match watched and Match primary reason for attendance

% of respondents who attended both matches

■ Watched ■ Main Reason



Source: Canberra Raiders Attendance Survey; n = 967.

Raiders Players are Positive Role Models ¹⁸⁴

Do you see the Canberra Raiders players as positive role models in the community?

74%
Yes



Why do you see the Canberra Raiders players as positive role models in the community?

"They engage with people from across the community in many ways, from simple meetings through to working with numerous charities."

"Kids look up to the players and aspire to be them - as players and as humans - and the players, to their credit, haven't been in the media for off-field incidents which pleases me as a fan."

"They use their public platform to raise awareness about important issues."

"They create a sense of pride in our community and on the whole act in a responsible manner."

"The NRLW team encourage women to get involved in sport."

Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 638.

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Raiders Attendee Profile

Raiders attendees are more likely to be male, aged between 35-44 and working full time; with a household income between \$100k - \$200k

Gender



61% Male



39% Female

Household Status



Single

17%



Couple

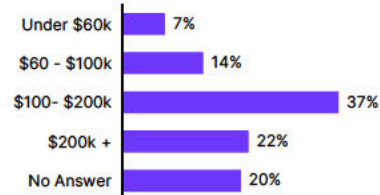
21%



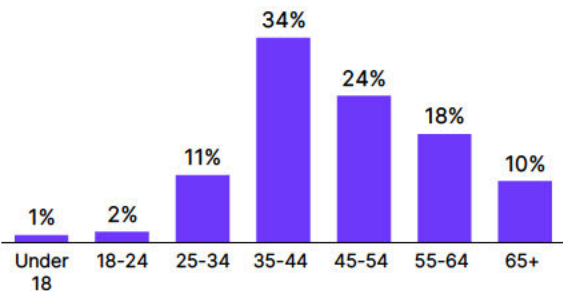
Family

59%

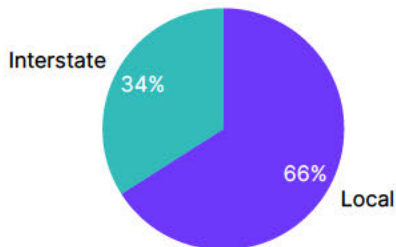
Household Income



Age



Location



Employment Status

66%
Working Full
Time



Source: Canberra Raiders Attendance Survey: n = 967.

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