



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	☒ Published ☐ N/A
Decision notice	☒ Published ☐ N/A
Documents and schedule	☒ Published ☐ 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: CMTEDDDOI 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



FREEDOM OF INFORMATION REQUEST SCHEDULE

Ref No	Page number	Description	Date	Status	Reason for Exemption	Online Release Status
1	1-29	2022 ACT Brumbies Economic Impact & Attendee Research Report	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	2022 GWS Giants Economic Impact & Attendee Research Report	November 2022	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
4	107-145	2023 ACT Brumbies Economic Impact & Attendee Research Report	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	2023 GWS Giants Economic Impact & Attendee Research Report	November 2023	Partial Release	Sch 2 s2.2 (a)(xi)	Yes
Total No of Docs						
6						



ACT BRUMBIES ECONOMIC IMPACT REPORT

Economic Impact & Attendee Research Report



August 2022

Project Overview

Nielsen Sports was commissioned by the ACT Brumbies to conduct a study of the economic & community impact of matches played in Canberra for the 2022 season.

The report includes:

- Gross economic impact to the Canberra region from the staging of 2022 ACT Brumbies home matches. Gross Economic Impact includes direct expenditure only.
- The community impact of Brumbies 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 Brumbies sponsors.

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

Survey Type	Completes
Online Survey	906



Executive Summary

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Executive Summary: Key Metrics



Partner Recall

42%

Attendees aware of SG Fleet

When asked to recall sponsors of the ACT Brumbies, 42% of respondents noted SG Fleet. Prompted awareness is 37 percentage points higher at 79%.



Economic Impact Insights

\$2.2M

Injected into the Canberra economy by visitors

A total of 12.3k In-Scope visitors spent money within the Canberra/ACT area as a result of attending Brumbies figures, with an average of \$177 per day spent by overnight visitors.



Community Sentiment Insights

92%

Said they'll advise others to come to Canberra

92% of attendees stated that they would advise others to come to Canberra, 3 percentage points higher than last year. The percentage of patrons who stated that their visit changed their perception of Canberra for the better increased by 2 percentage points.

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Sch 2.2(a)(xi)

Sch 2.2(a)(xi)

Sch 2.2(a)(xi)

Executive Summary

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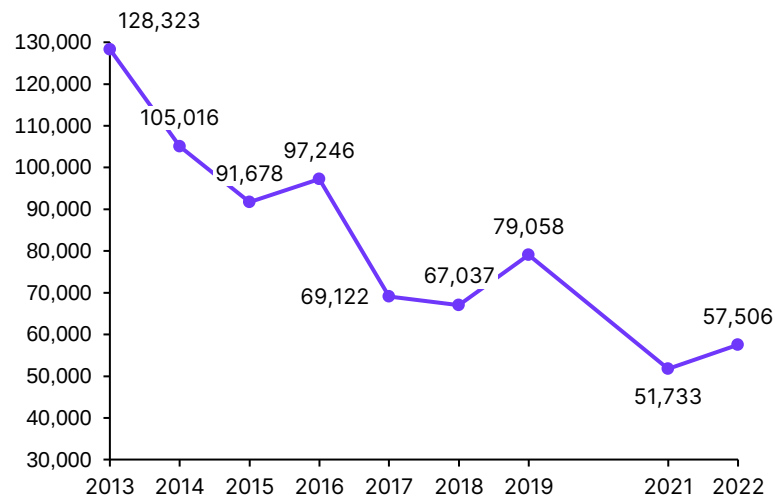
ACT Sport & Recreation

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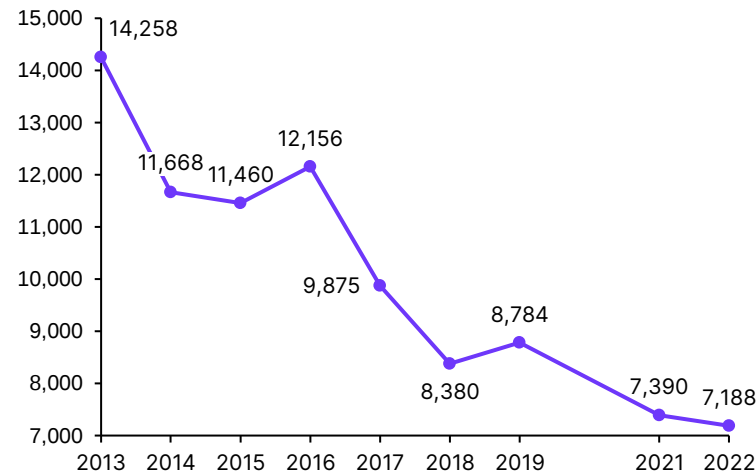
Attendance Summary

Cumulative attendance increased compared to 2021 due to the quarter final being played in Canberra; whilst average attendance remained stable compared to last year

Cumulative Attendance by Season



Average Attendance by Season

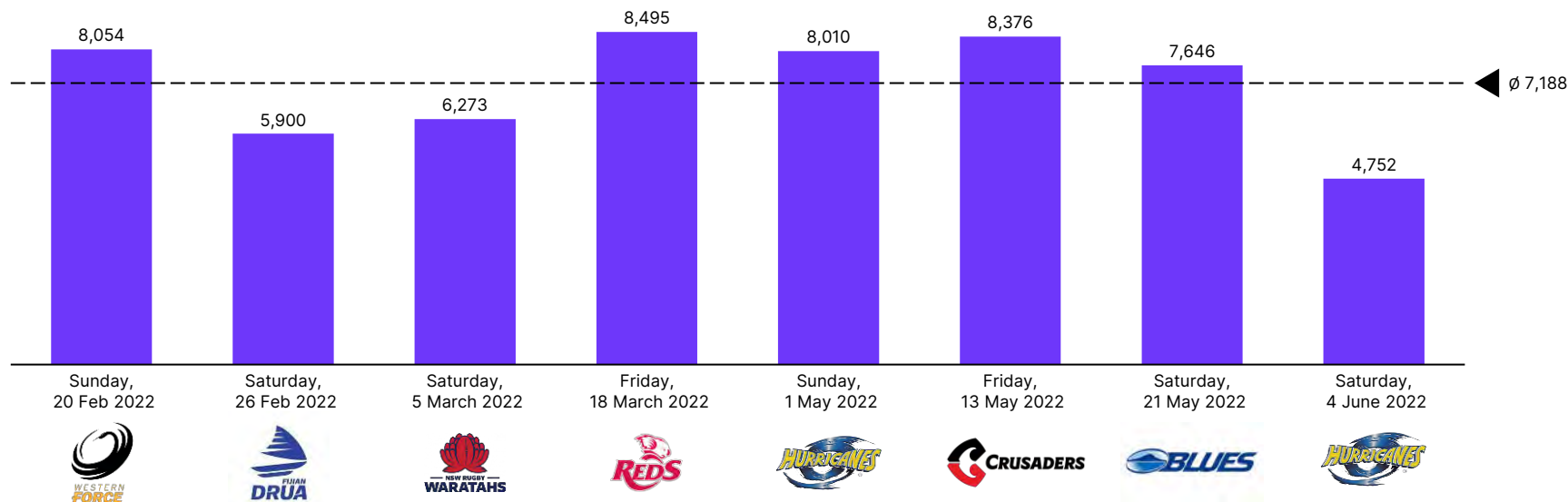


Source: ACT Brumbies Ticketing Information.

Attendance Summary by Match

The match between the Brumbies and the Reds on the 18th of March generated the largest attendance for the season at 8,495

Attendance by Fixture



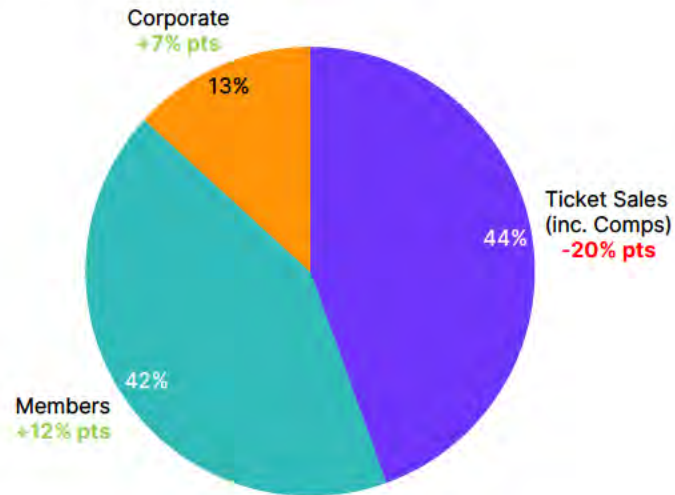
Source: ACT Brumbies Ticketing Information.

Growth in number of member tickets

A decrease in ticket sales indicates that attendees are making their decision to attend further away from the event than in previous years

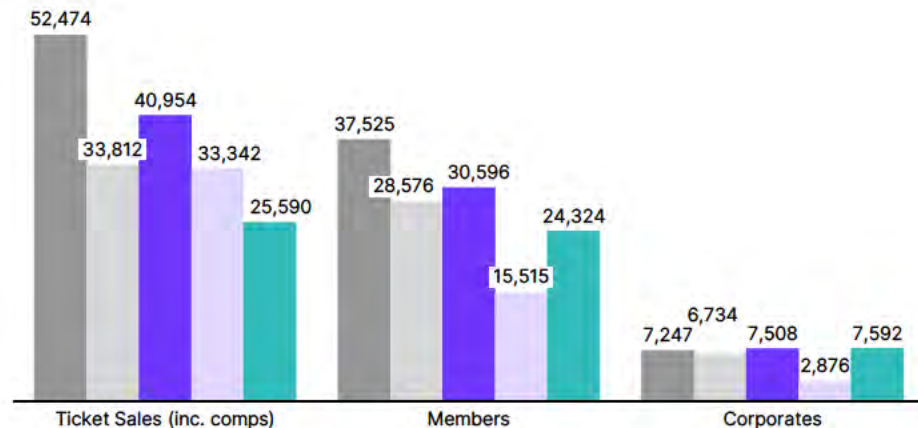
Attendance Type – Share of Voice

%



Attendance Type – Year on Year

2017 2018 2019 2021 2022



Source: ACT Brumbies Ticketing Information.

12k In Scope* visitors to Canberra

Approximately 35% of attendees were from outside of the ACT, equating to 12,296 visitors

Assumptions and Definitions:

- » Attendee type data supplied by the Brumbies
- » Ticket sales origin sourced from Ticketek postcode report – ACT/Interstate split based off average of 2016-2019 numbers
- » 91% of members live within the ACT and 9% Interstate (source - Brumbies Members registered address)
- » 84% of Corporate attendees from the ACT (sourced from Brumbies)
- » In scope is defined as those whose main driver for visiting or extending their visit to Canberra / ACT was attending a Brumbies Match derived from Nielsen Sports Match Attendee Survey (n=906)
- » Total in Scope Visitors does not include persons that accompanied survey participants on their trip to Canberra
- » There was a significant number of ACT ticket sales as well as member tickets in 2022; whilst interstate ticket sales have not returned to pre-COVID levels. This suggests that interstate travel has not yet resumed as per normal.

ATTENDEE TYPE	TOTAL ATTENDEES	% IN SCOPE	# IN SCOPE
ACT Ticket Sales	16,697	0.0%	0
ACT Members	22,135	0.0%	0
ACT Corporates	6,377	0.0%	0
Interstate Ticket Sales	8,893	97.3%	8,651
Interstate Members	2,189	97.3%	2,130
Interstate Corporates	1,215	100.0%	1,215
Overseas Ticket Sales		0.0%	0
Overseas Members		0.0%	0
Overseas Corporates		100.0%	0
Total	57,506		11,995

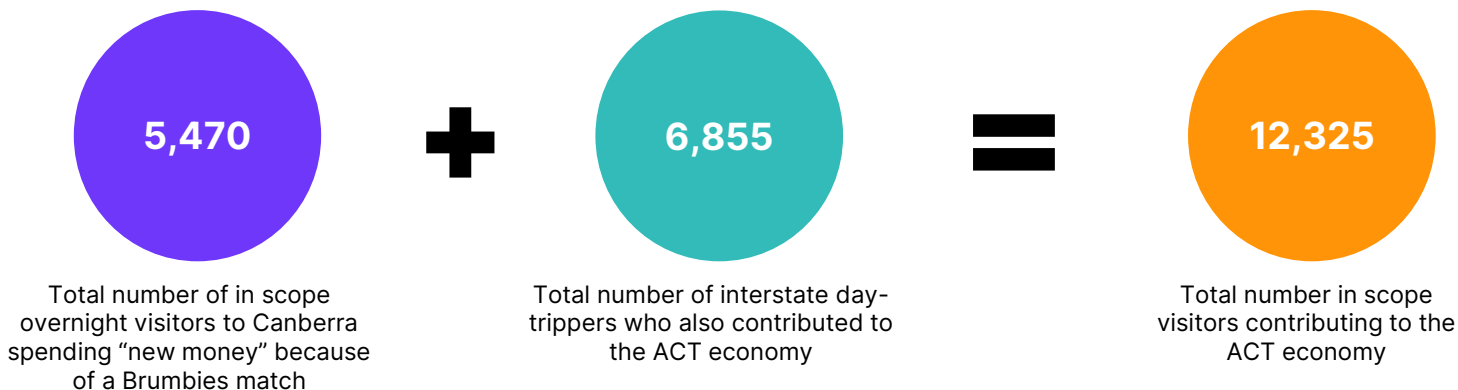
^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included. *Entourage not included in this metric.

Source: ACT Brumbies Ticketing Information. Source: ACT Brumbies Attendance Survey; n = 906.

12,325 visitors to Canberra

An additional 330 people travelled to Canberra as a result of their travel party's intentions to attend a Brumbies match

ATTENDEE TYPE	TOTAL IN SCOPE ATTENDEES	IN SCOPE VISITOR TYPE	% VISITOR TYPE	# VISITOR TYPE	ACCOMPANYING PERSONS	TOTAL IN SCOPE VISITORS
Interstate	11,995	Overnight	44%	5,284	185	5,470
		Daytrippers	56%	6,710	144	6,855
Overseas		Overnight	100%	0	0	0
Total	11,995			11,995	330	12,325



[^] In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Ticketing Information. Source: Source: ACT Brumbies Attendance Survey: n = 906.

\$2.2M spent in Canberra by visitors

Interstate overnight visitors stayed on average 1.93 nights and spent on average \$177 per day

ATTENDEE TYPE	TOTAL IN SCOPE VISITORS	AVERAGE LENGTH OF STAY	BED NIGHTS	AVERAGE DAILY SPEND	IN-SCOPE VISITOR SPEND
Interstate Overnigheters	5,470	1.93	10,556	\$176.82	\$1,866,538
Interstate Daytrippers	6,855	0.00	0	\$50.88	\$348,802
Overseas Overnigheters	0	0.00	0	\$0.00	\$0
Total	12,325	1.93	10,556	\$106.78	\$2,215,341



[^] In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Ticketing Information. Source: Source: ACT Brumbies Attendance Survey: n = 906.

Increased Length of Stay YoY

OUTPUT	2022	2021	2019	2018	2017	% DIFFERENCE 2022 TO 2021
Total attendance	57,506	51,733	79,058	67,037	69,122	11%
Outside of ACT attendance	12,296	13,443	18,285	16,870	12,253	-9%
In Scope Visitors	12,325	13,148	17,889	16,064	10,584	-6%
Overnight Split	44%	47%	69%	54%	57%	-6%
Avg. Length of Stay	1.93	1.80	1.96	1.67	1.42	7%
Bed nights	10,556	11,008	24,340	14,794	8,542	-4%
Avg. Daily Spend	\$177	\$213	\$182	\$183	\$164	-17%
In-Scope visitor spend	\$2,215,341	\$2,678,294	\$4,652,396	\$3,360,180	\$1,914,259	-17%

ANALYSIS:

- The 2022 Economic Impact survey confirmed a large amount of anecdotal trends in the sporting landscape in Australia over the past 18 months; most noticeably a decrease in average daily spend.
- Ongoing COVID-19 situations have resulted in less attendance and ability to travel since 2019; however total attendance has increased by 11% from 2021 to 2022.
- Average length of stay has increased by 7% compared to 2021; returning to pre-COVID levels. This indicates attendees are making the most of their visit to Canberra.
- Whilst total visitor spend is down on 2021, the 2022 figure has remained relatively stable with 2019 and 2018.
- The portion of visitors who stay overnight has continued to decrease; indicating that interstate attendees are opting to visit and return in one day.
- In 2022 the Brumbies hosted three afternoon matches; resulting in visitors opting to stay for the day rather than overnight. As a result of more daytrippers; total economic impact was less than last year due to a lower daily spend.

^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Ticketing Information. Source: Source: ACT Brumbies Attendance Survey; n = 906.

Executive Summary

Partner Recall

Economic Impact

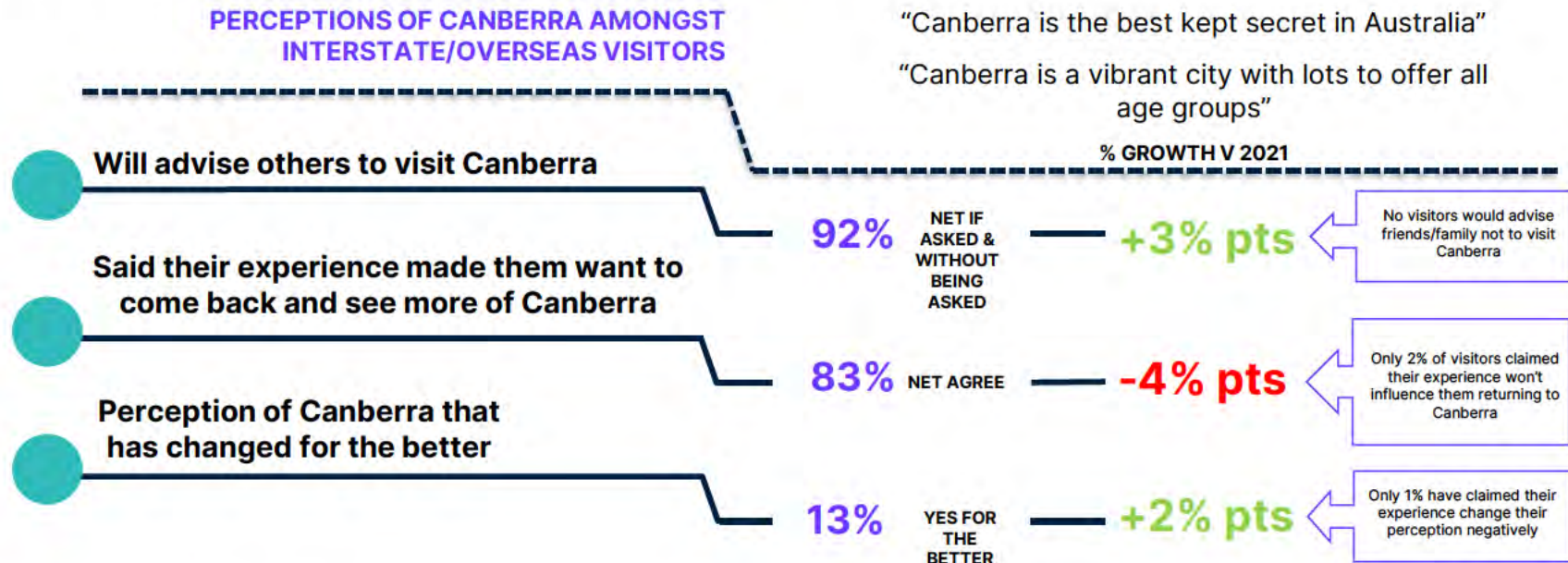
Community Sentiment

ACT Sport & Recreation

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Advocacy of Canberra is consistent

There has been an increase in visitor's perceptions of Canberra; with 92% saying they would advise others to visit Canberra, 3 percentage points higher than in 2021



Source: ACT Brumbies Attendance Survey: Visitors = 151

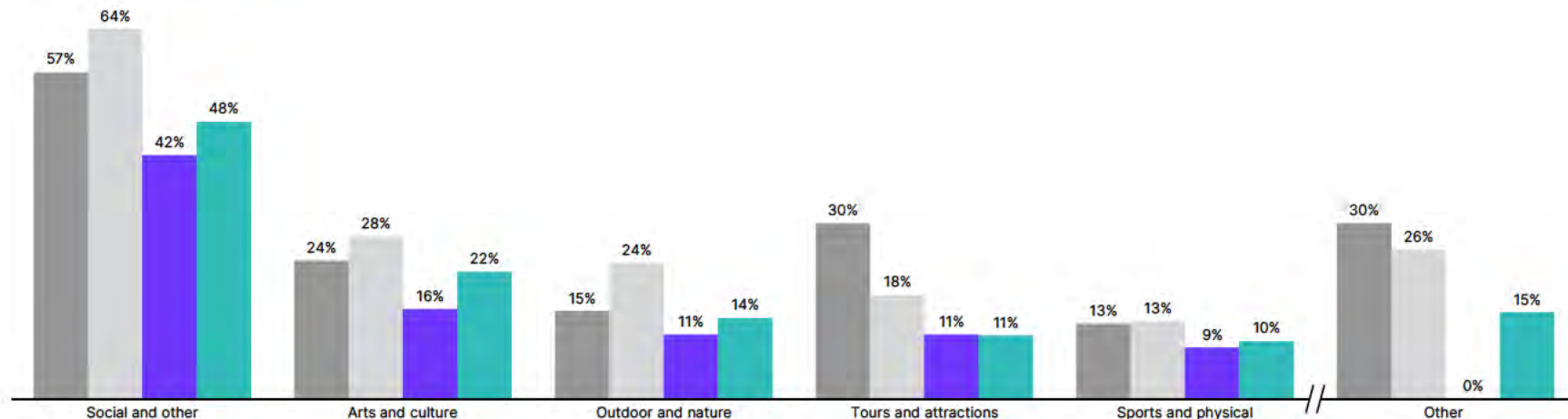
Slight increase YoY in other activities

The percentage of people who are engaging with activities outside of the Brumbies match has increased versus 2021; however has not returned to pre-pandemic years

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

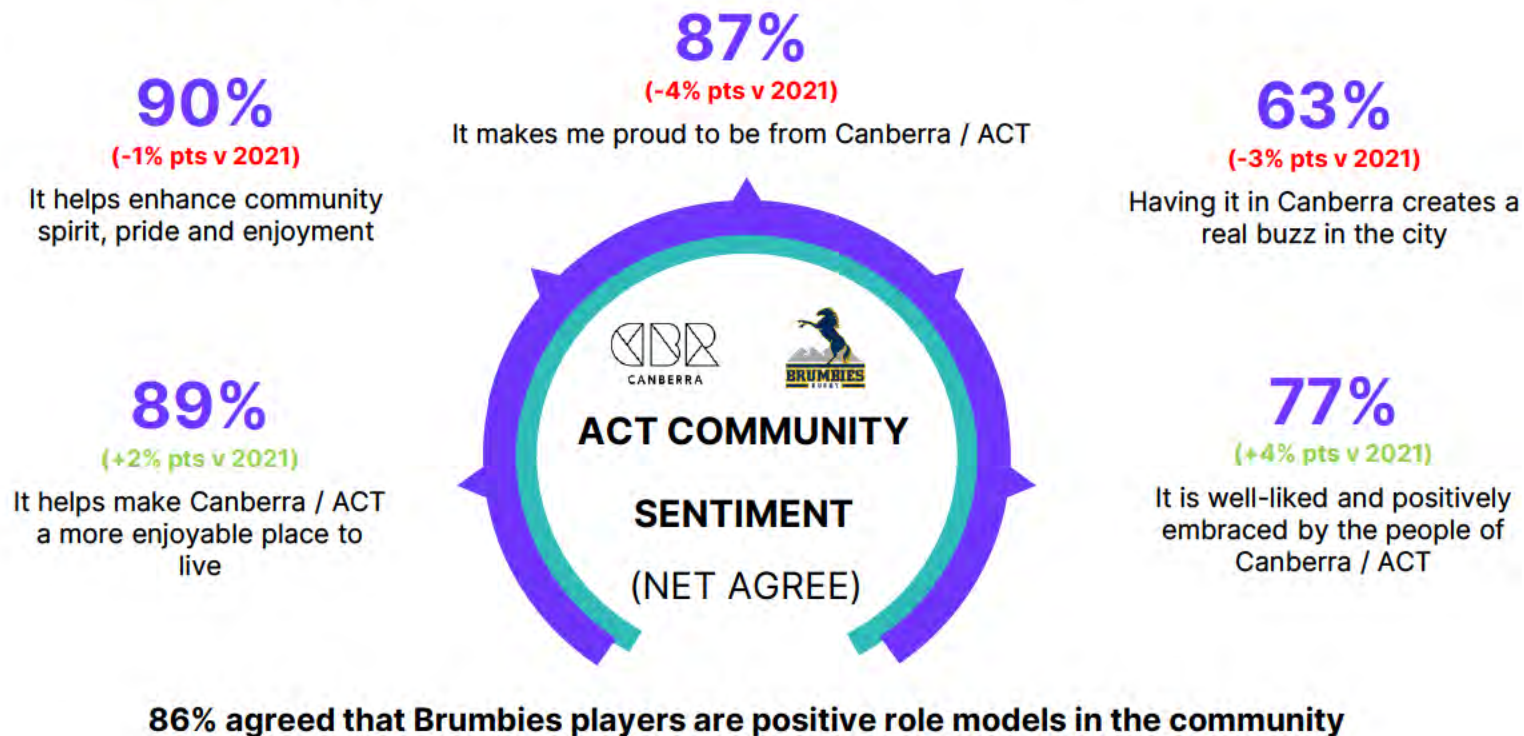
% of Interstate Visitors

■ 2018 ■ 2019 ■ 2021 ■ 2022



Source: ACT Brumbies Attendance Survey: Visitors = 151

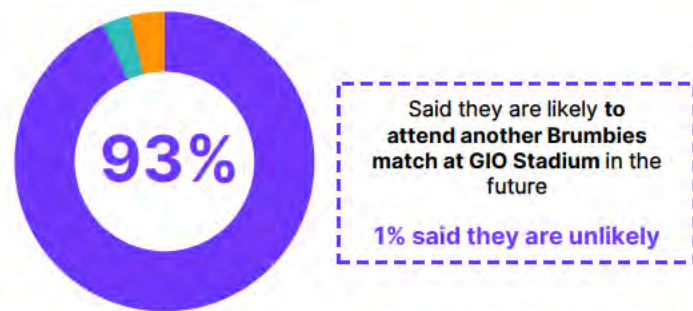
Community Metrics remain stable



Source: ACT Brumbies Attendance Survey: ACT Residents = 755

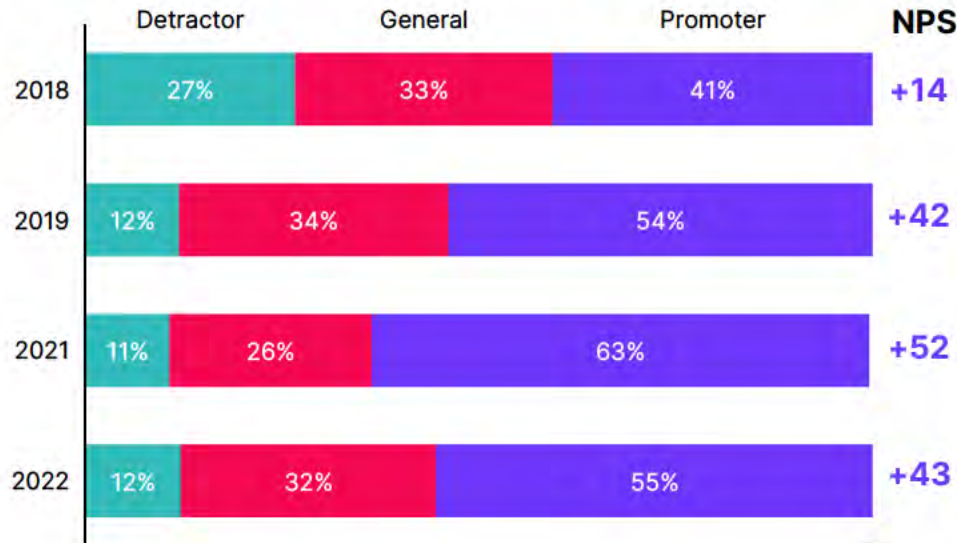
NPS remains higher than pre-covid years

The Net Promoter Score of Brumbies games among 2022 attendees is 43; higher than that in 2019 and 2018



LIKELY  ↓ 5% pts on 2021
 NEUTRAL  ↓ 2% pts on 2021
 UNLIKELY  ↓ 3% pts on 2021

Likelihood to recommend a Brumbies game
% of attendees



Source: ACT Brumbies Attendance Survey: n = 906

Executive Summary

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ACT Sport & Recreation Key Metrics

 	Total
Survey Sample Size	906
Economic Impact (Visitor Expenditure)	\$2,215,341
Economic Activity (Local)	\$2,050,705
Visitation	12,325
Ticketed Attendance	57,506
Bed Nights	10,556
Ave. Visitor Length of Stay	1.93
Ave. Visitor Daily Spend	\$176.82
Ave. Local Spend per Person	\$72.74
Likelihood of Return Visit	83%
Net Promoter Score	43
Enhances community spirit, pride, & enjoyment	90%
Event Satisfaction Rating	NA
Overall Marketing Score	NA

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
143	63	80	0	755
\$2,215,341	\$1,866,538	\$348,802	\$0	
				\$2,050,705
12,325	5,470	6,855	0	
	12,296		0	45,210
10,556	10,556		0	
	1.93	0	0	
	\$176.82	\$50.88	0	

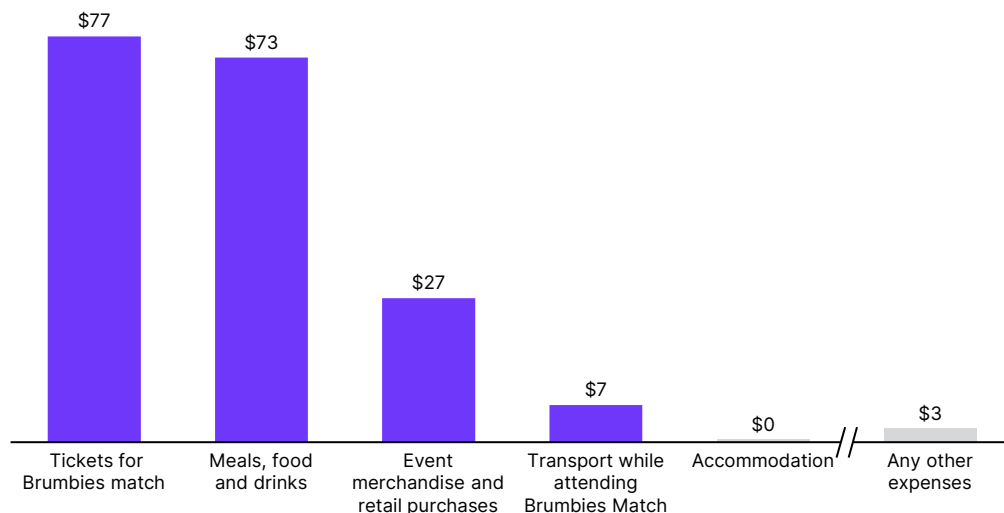
Source: ACT Brumbies Attendance Survey: n = 906

Local Average Spend \$73 per person

Tickets for the Brumbies match was the main source of group expenditure among ACT residents; followed by meals, food and drinks

Average Local Group Expenditure as a Result of 2022 ACT Brumbies Home Games

\$ | ACT Residents



Local Residents

\$73

Per person expenditure

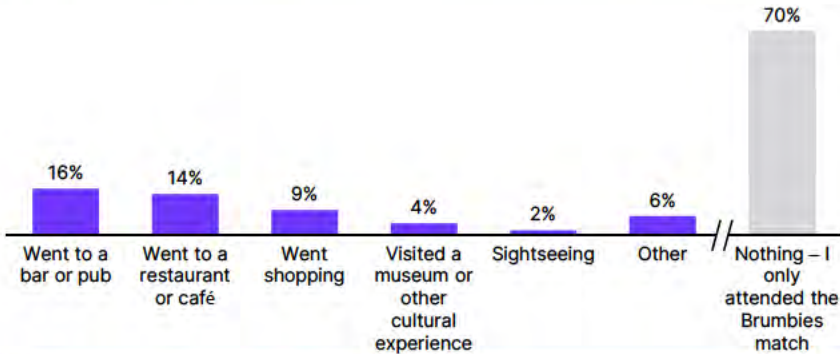
Local resident per person expenditure as a result of 2022 Brumbies home games.

This is calculated based on an average group size of 2.6 people and group expenditure of \$186.

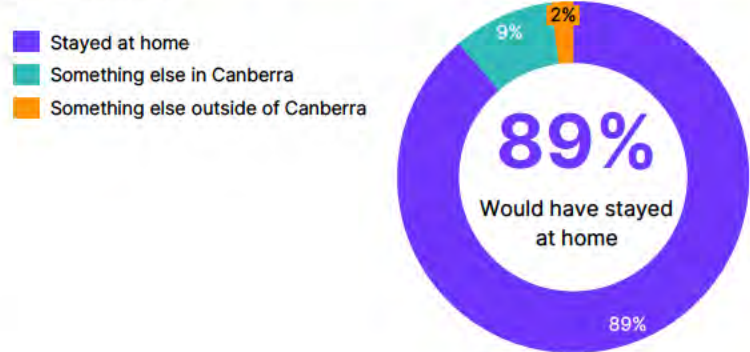
Source: ACT Brumbies Attendance Survey: ACT Residents = 755

Local Perception of Brumbies Match in ACT²⁵

Leisure Activities whilst in ACT for Brumbies Home Games % ACT Residents



What local residents would have done instead of attending % ACT Residents



99%



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

92%



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

Source: ACT Brumbies Attendance Survey: ACT Residents = 755

Brumbies Players are Positive Role Models²⁶

Do you see the ACT Brumbies players as positive role models in the community?

86%
Yes



Why do you see the ACT Brumbies players as positive role models in the community?

"They are actively involved within the community and make a positive impact."

"Brumbies players are important sporting role models for young rugby players. Having the team in Canberra encourages local talent and participation in sport."

"The players are always approachable, respectful, friendly, and eager to be a part of the community."

"They're all excellent young men who are very approachable. They display the values and standards of behaviour that creates a great environment (unlike some other codes!)"

"They help young rugby players in our community aspire to play rugby professionally."

Source: ACT Brumbies Attendance Survey: ACT Residents = 755

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Brumbies Attendee Profile

Brumbies attendees are more likely to be male, aged between 45-54 and working full time; with a household income between \$100k - \$200k

Gender



72% Male



28% Female

Household Status



Single
14%

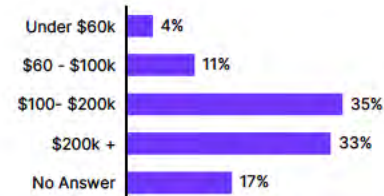


Couple
19%

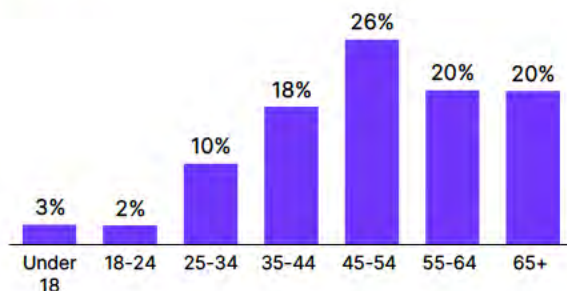


Family
60%

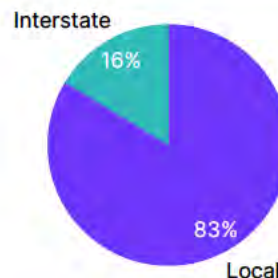
Household Income



Age



Location



Household

62%
Working Full
Time



Source: ACT Brumbies Attendance Survey; n = 906





CANBERRA RAIDERS ECONOMIC IMPACT REPORT

Economic Impact & Attendee Research Report



November 2022

Project Overview

Nielsen Sports was commissioned by the Canberra Raiders to conduct a study of the Economic & Community Impact of matches played in Canberra for the 2022 season.

The report includes:

- Gross Economic Impact to the Canberra region from the staging of 2022 Canberra Raiders home matches played in Canberra. Gross Economic Impact includes direct expenditure only.
- The Community Impact of 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.

Survey Type	Completes
Online Survey	986



Executive Summary

Economic Impact

Event Experience &
Satisfaction

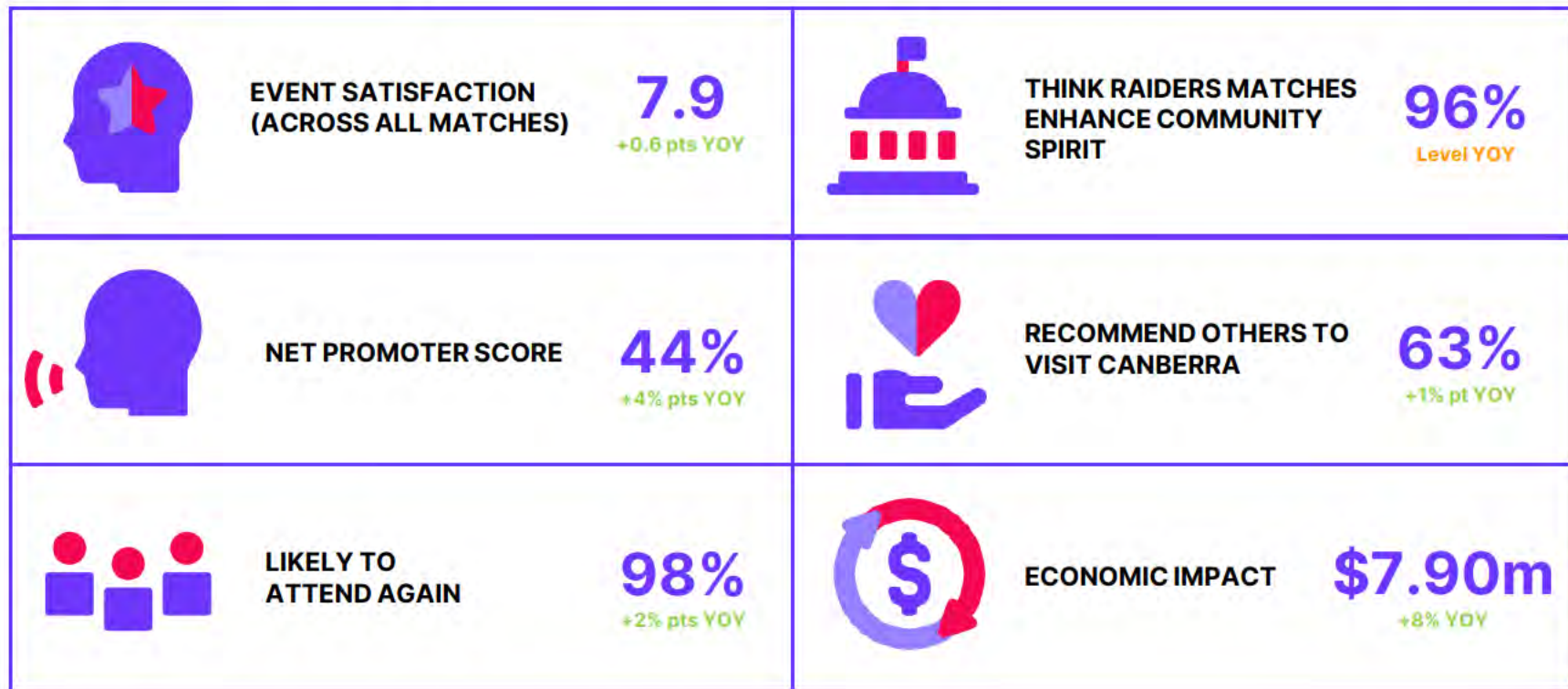
Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

Key Findings



Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 986

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Executive Summary

Economic Impact

Event Experience &
Satisfaction

Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

33,452 In-Scope Visitors to Canberra

Approximately 68% of interstate visitors who attended a Raiders match stayed overnight; equating to 22,758 visitors

Attendee Type	Total Attendees	% In scope Attendees	# In scope attendees
ACT Ticket Sales	109,599	0.00%	0
Interstate Ticket Sales	33,759	96%	32,423
Total	143,358		32,423

Attendee Type	Total In Scope Attendees	In Scope Visitor Type	% Visitor Type	# Visitor Type	Accompanying Persons	Total In Scope Visitors
Interstate	32,423	Overnight	67%	21,765	993	22,758
		Day trippers	33%	10,658	125	10,784
Total	32,423			32,423	1,119	33,542

22,758

Total number of In-Scope Interstate Overnight Visitors to Canberra spending “New Money” because of a Raiders match

+

10,784

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

=

33,452

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

Total Economic Impact for 2022 is \$7.90m

Overnight visitors accounted for 91% of total Economic Impact value; with the remaining \$741k 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	22,758	1.71	39,014	\$183.51	\$7,159,586
Interstate Day trippers	10,784	n/a	0	\$68.74	\$741,287
Total	33,542	1.71	39,014	\$146.61	\$7,900,873

\$7,159,586

Total direct expenditure
derived from 22,758 overnight
in-scope visitors



\$741,287

Total direct expenditure
derived from 10,784 in-scope
day visitors

Economic Impact Benchmarking

All metrics excluding average length of stay and average daily spend observed increases compared to 2021; with total direct visitation expenditure increasing by 8%

Attendee Type	2022	2021	2020	2019	2018	2017	2016	2015	2014	% Difference to 2021
Total attendance	143,358	95,391	36,121	166,708	132,163	158,998	187,857	115,549	115,298	50%
Outside of ACT attendance	33,759	23,156	8,827	46,749	36,864	44,247	52,445	21,432	17,544	46%
In Scope Visitors	32,423	25,520	8,297	43,015	34,042	40,014	50,577	20,696	16,659	27%
Overnight Split	67%	67%	66%	63%	63%	66%	56%	55%	62%	0%
Ave. Length of Stay (Overnighters)	1.71	1.93	1.65	1.78	1.95	1.60	1.61	1.72	1.87	-11%
Bed nights	39,014	28,258	9,584	51,236	45,953	43,200	45,950	20,270	19,879	38%
Ave. Daily Spend	\$146.61	\$156.38	\$143.59	\$135.64	\$135.97	\$158.24	\$171.72	\$164.60	\$205.88	-6%
Direct Visitation Expenditure	\$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	8%

Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 986

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Executive Summary

Economic Impact

**Event Experience &
Satisfaction**

Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

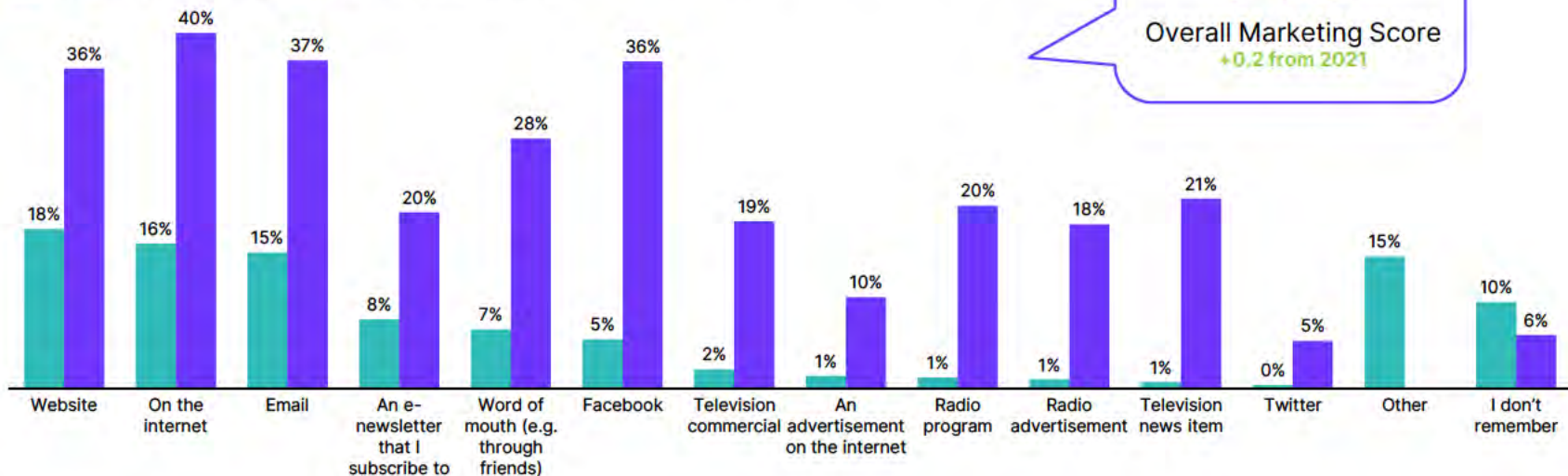
Website & Internet drivers of awareness

Website was the primary method via which respondents first heard about a given Raiders match (18%); whilst Internet 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 In-Scope Attendees

First heard about the event Also heard about the event



Source: Canberra Raiders Attendance Survey: n = 986

Marketing Channels YoY Comparison

The top six marketing channels observed growth in secondary awareness; with Internet 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?"

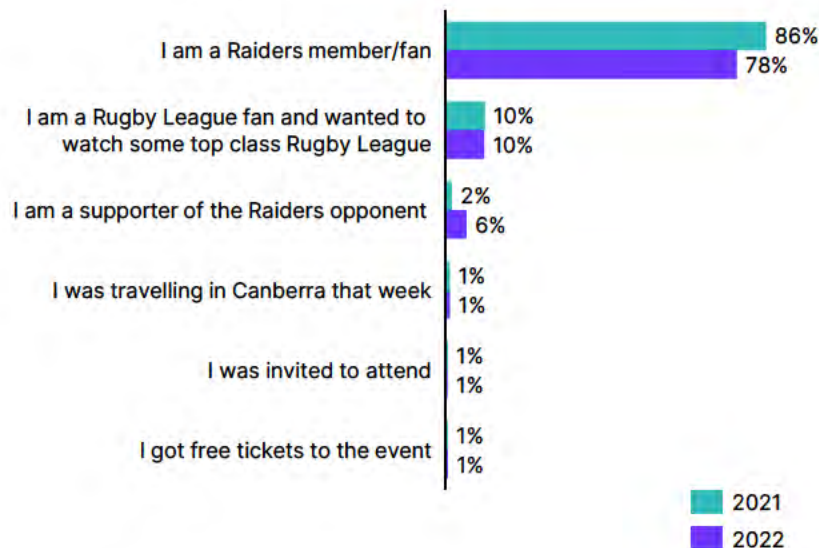
Source	First Found Out						Also heard about						Total					
	2017	2018	2019	2020	2021	2022	2017	2018	2019	2020	2021	2022	2017	2018	2019	2020	2021	2022
On the internet:	16%	15%	14%	11%	20%	16%	33%	34%	29%	37%	33%	40%	49%	49%	43%	48%	53%	56%
Website	17%	19%	18%	14%	18%	15%	36%	39%	31%	42%	32%	37%	53%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

Source: Canberra Raiders Attendance Survey: n = 986

Membership drives reasons for attending ⁴¹

78% of respondents stated that the reason for attending the match was because they are a member/fan; whilst 6% 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?

35%

Families, just adults

41%

Families, with children

7% aged under 5, 25% aged 6-12,
12% aged 13-18

31%

Friends

Source: Canberra Raiders Attendance Survey: n = 986

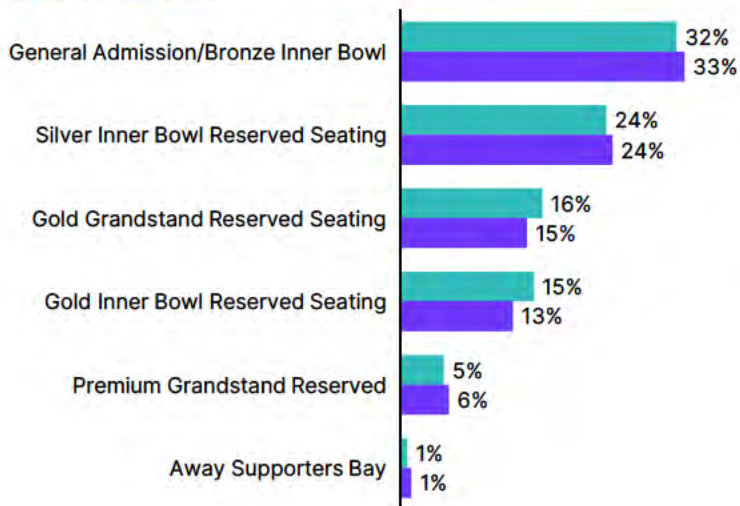
General Admission tickets most popular

42

88% of respondents stated that they felt their ticket was good value for money (across all ticket types); remaining on par with previous years

What ticket did you purchase to attend the Raiders game?

2021 2022



% Agree value for money

86%

90%

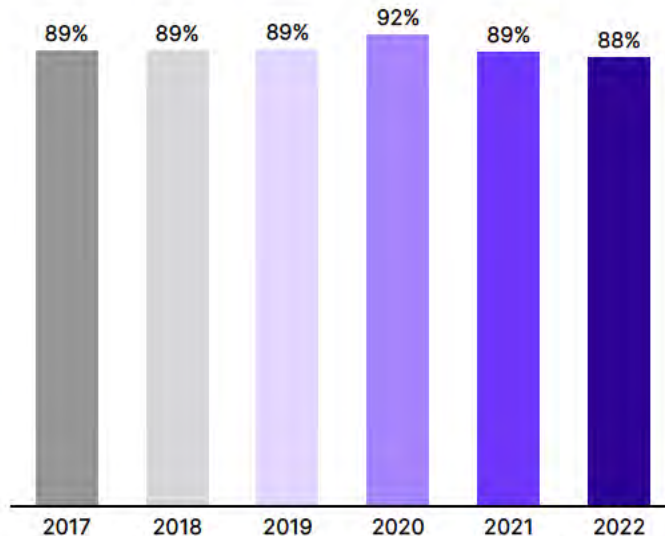
83%

92%

84%

92%

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



Source: Canberra Raiders Attendance Survey: n = 986

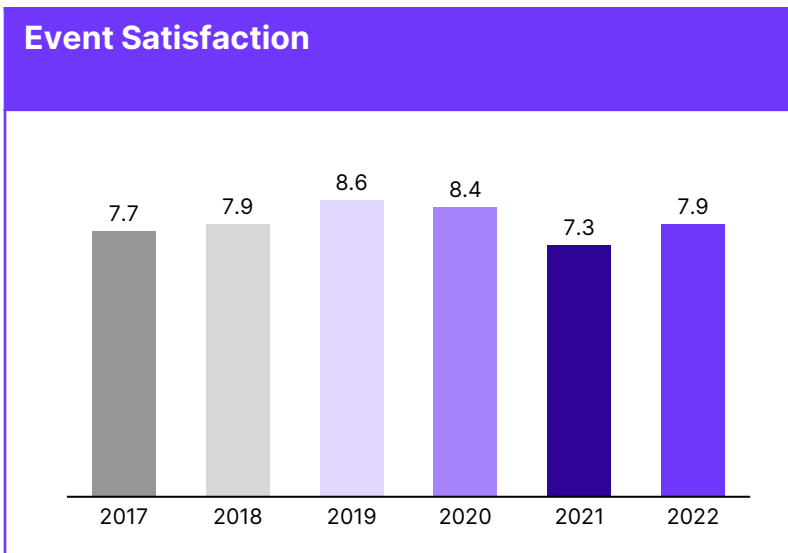
Sch 2.2(a)(xi)

98% of attendees likely to attend again

Event Satisfaction observed a 0.6 point increase compared to 2021; whilst the number of respondents who stated that they are likely to attend another Raiders match increased by 2 % points

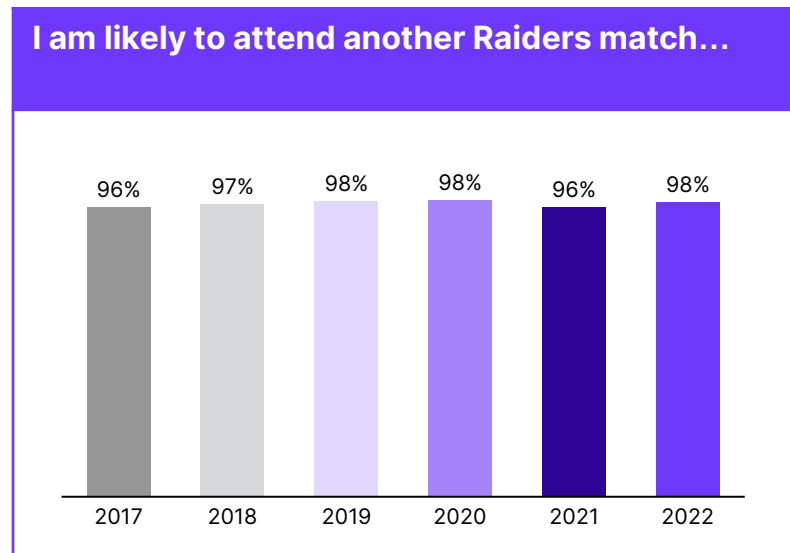
Please describe your overall level of satisfaction and enjoyment from attending your most recent Raiders match at GIO Stadium Canberra?

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 = 986

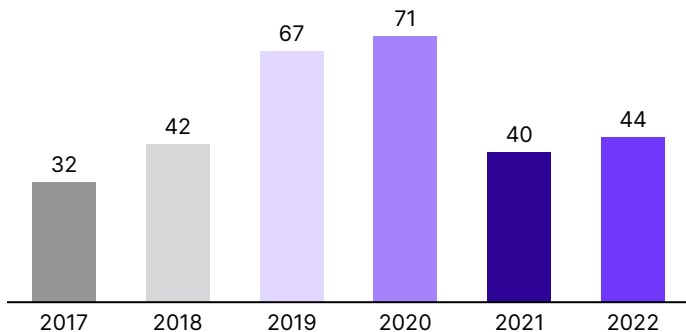
All key metrics observed increases in 2022⁴⁵

The Net Promoter Score was 4 points higher than in 2021; whilst 26% of respondents stated that the match was better than they expected; a 13 percentage point increase

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

1 – 10 Point Scale

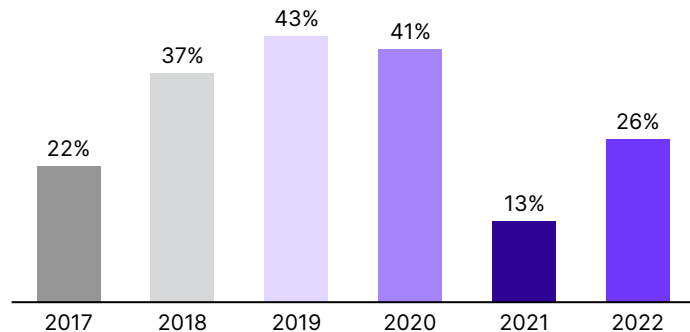
Net Promoter Score



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

% of In-Scope respondents

The event was better than expected...



Source: Canberra Raiders Attendance Survey: n = 986

Atmosphere key driver of satisfaction

For the large majority of those who gave a positive event satisfaction score; the atmosphere and the sense of community were key highlights

What was the major reason for your positive satisfaction rating?

"The atmosphere at GIO was great, it has that community feel, where everyone supports and encourages one another, and the team appreciate the fans and the fans appreciate the players."

"Amazing atmosphere and nothing can beat the Viking clap in person. It was my first home game for since I was a kid. My family loved every minute of the game."

"Seamless entry to the ground. It is a wonderful venue for Rugby League. Friendly support staff."

What was the major reason for your negative satisfaction rating?

"Food lines were long and expensive."

"Poor facilities and car parking."

"Catering choices still leave much to be desired and catering is limited if one arrives to attend the earlier lead-up matches."

Key Insights:

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

- » The key drivers of positive satisfaction scores were sourced from the enjoyment of supporting the Raiders & and a strong atmosphere at the match
- » A minority of respondents indicated that the lack of food and beverage options as well as the increasing prices was the reason for their negative score
- » Respondents noted that crowd engagement was a big factor in their enjoyment of the match

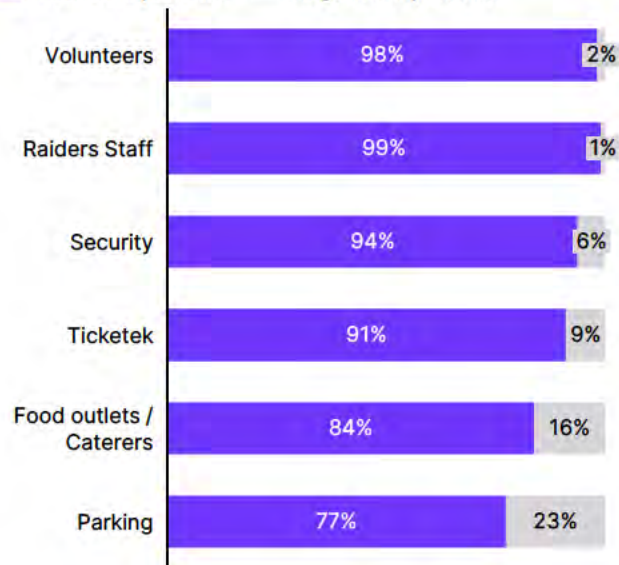
Source: Canberra Raiders Attendance Survey: n = 986

Customer Service Experience Satisfaction ⁴⁷

Customer service experience satisfaction increased for Security 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



2021	2020	2019	2018	2017	2016
99% -1% pts YOY	98%	99%	99%	99%	99%
99% Level	98%	99%	99%	98%	98%
93% +1% pts YOY	94%	79%	77%	81%	-
91% Level	91%	94%	93%	94%	95%
86% -2% pts YOY	86%	85%	93%	92%	91%
82% -5% pts YOY		83%	81%	81%	75%



57%

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

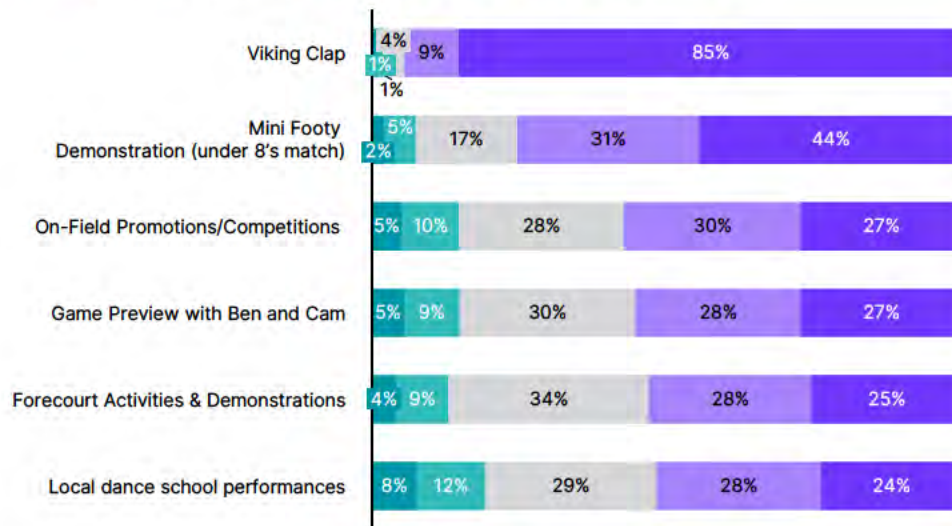
Source: Canberra Raiders Attendance Survey: n = 986

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 was 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



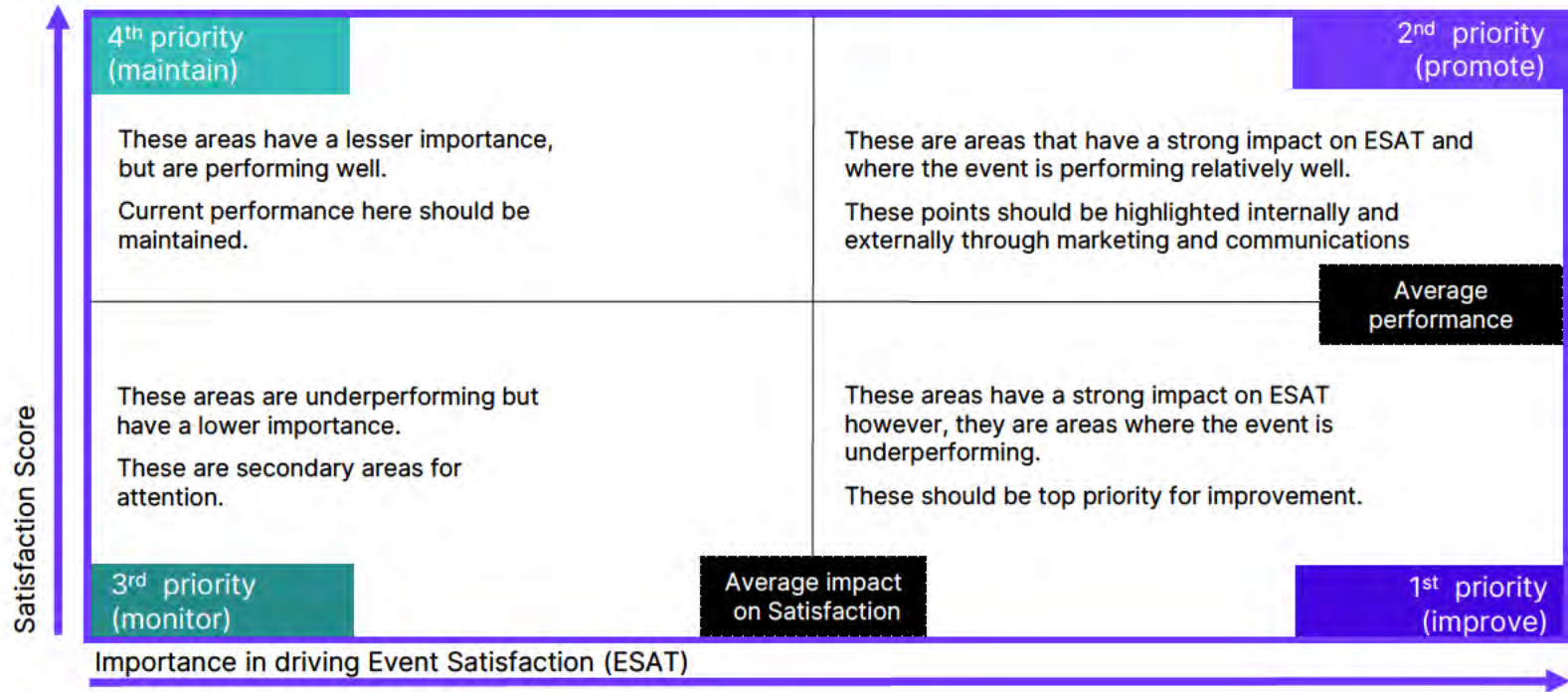
In regards to Game Day Entertainment, what can the Raiders do to make the sporting experience more enjoyable?:

- » "More half-time content, i.e., live music."
- » "More involvement from the junior footy community."
- » "Involve local talent for entertainment."
- » "Have players who aren't playing on gameday to engage in fan activities, i.e., meet and greet or member promotions."
- » "Have curtain raiser games from local competition (juniors, women's and men's)."
- » "It would be good to see variety in game day entertainment – it is usually the same thing every week."

Source: Canberra Raiders Attendance Survey: n = 986.

Nielsen Impact Matrix

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



ESAT = Event Satisfaction

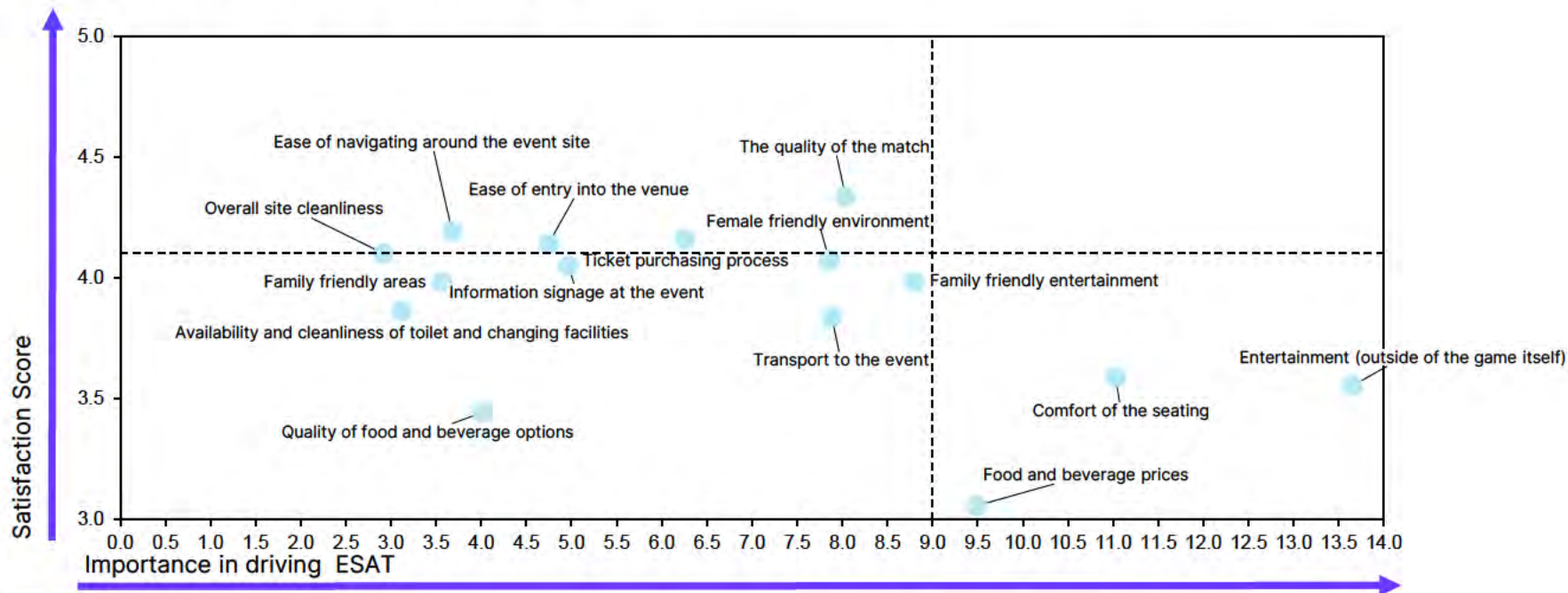
*Excludes those who did not experience element.

Source: Canberra Raiders Attendance Survey: n = 986.

Canberra Raiders: Nielsen Impact Matrix

50

When taking into account all event elements, entertainment (outside of the game itself) remains the biggest driver of event satisfaction



*Excludes those who did not experience element.
Source: Canberra Raiders Attendance Survey: n = 986.

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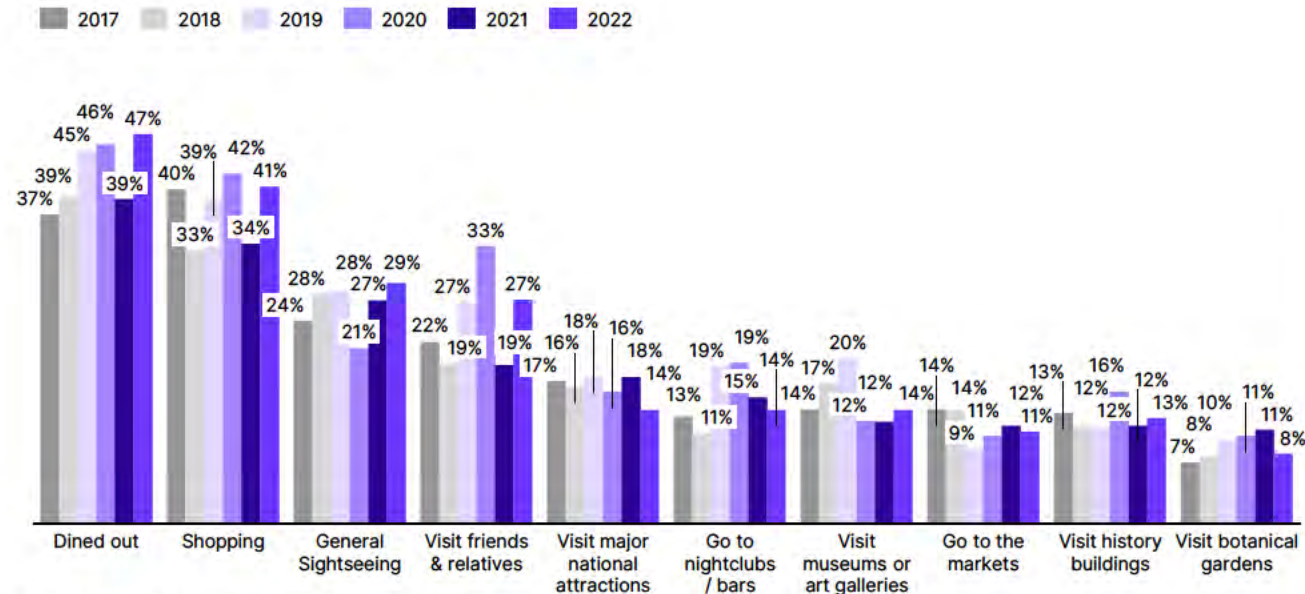
Appendix

Increase in engagement with activities

The top four activities for visitors to Canberra observed increases compared to 2021; with Dining and Shopping remaining the two most popular amongst respondents

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

Top Ten



Source: Canberra Raiders Attendance Survey; n = 986. Visitors to Canberra = 301

63%

Would recommend Canberra without being asked

Up 1% pts YOY

84%

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

Up 2% pts YOY

17%

Perception of Canberra that has changed for the better

81% said it remained unchanged

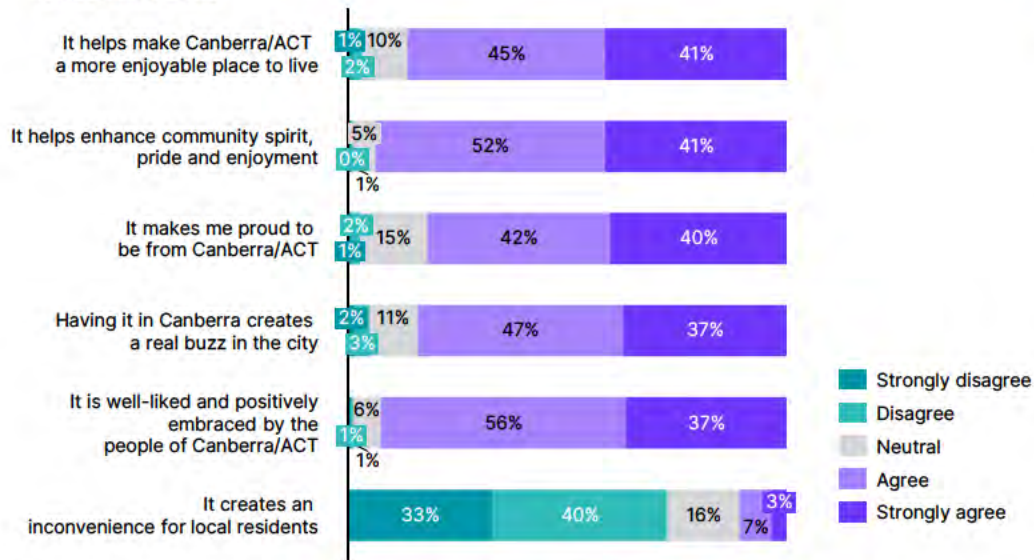
Up 6% pts YOY

Community sentiment remains high

Community sentiment remained stable compared to last year; with respondents also noting matches helped to make Canberra a more enjoyable place

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

% Local Residents



2022	2021	2020	2019	2018	2017
86%	91%	89%	88%	81%	81%
94%	94%	95%	94%	89%	91%
82%	88%	90%	90%	73%	75%
84%	89%	91%	92%	75%	74%
93%	93%	93%	94%	80%	80%
11%	9%	9%	8%	10%	8%

Source: Canberra Raiders Attendance Survey: n = 986. Local Residents = 685

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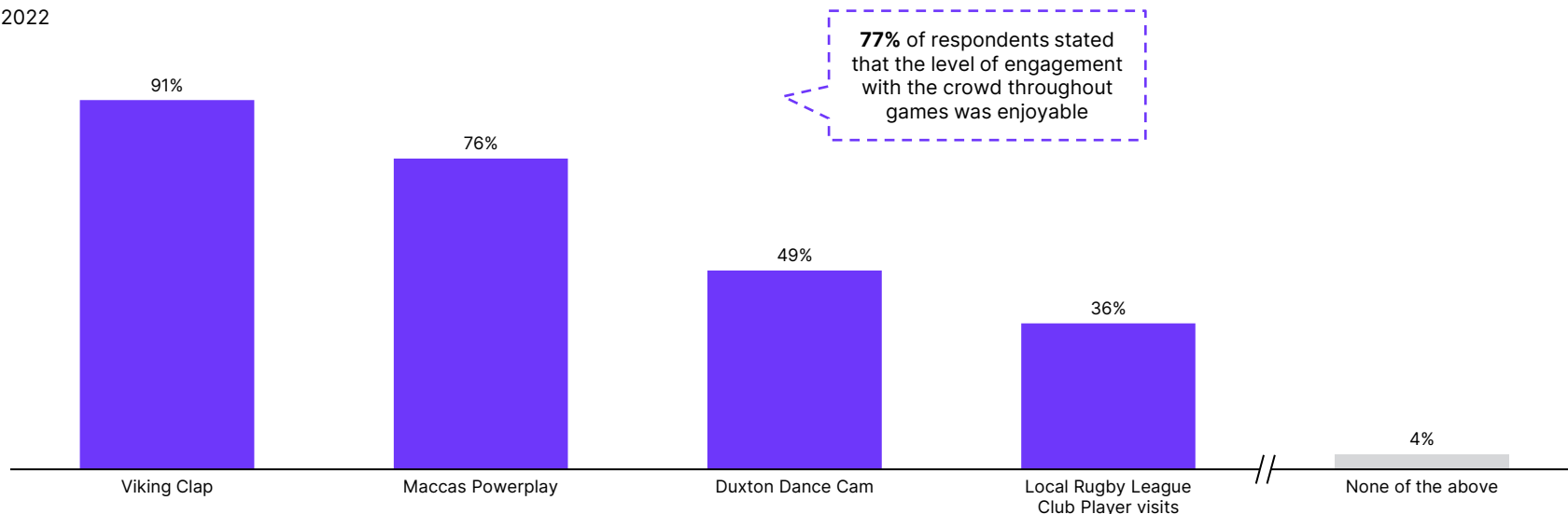
Sch 2.2(a)(xi)

91% of attendees aware of Viking Clap

Whilst the Viking Clap was by far the activity/initiative with the highest level of awareness, over two-thirds of respondents stated that they were aware of the Maccas Powerplay; whilst 49% knew about the Duxton Dance Cam

Which fan activities or initiatives are you aware of that the Raiders themselves or associated Corporate Partners ran during the 2022 season?

2022



Source: Canberra Raiders Attendance Survey: n = 986

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ACT Sport & Recreation Key Metrics

 	Total
Survey Sample Size	986
Economic Impact (Visitor Expenditure)	\$7,900,873
Economic Activity (Local)	\$7,153,636
Visitation	33,759
Ticketed Attendance	143,358
Bed Nights	39,014
Ave. Visitor Length of Stay	1.71
Ave. Visitor Daily Spend	\$146.61
Ave. Local Spend per Person	\$65.27
Likelihood of Return Visit	98%
Net Promoter Score	44
Enhances community spirit, pride, & enjoyment	94%
Event Satisfaction Rating	7.9
Overall Marketing Score	7.9

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
289	194	95	0	697
\$7,900,873	\$7,159,586	\$741,287	\$0	
				\$7,153,636
33,542	22,758	10,784	0	
	33,542		0	109,599
39,014	39,014		0	
	1.71	0	0	
	\$183.51	\$68.74	0	

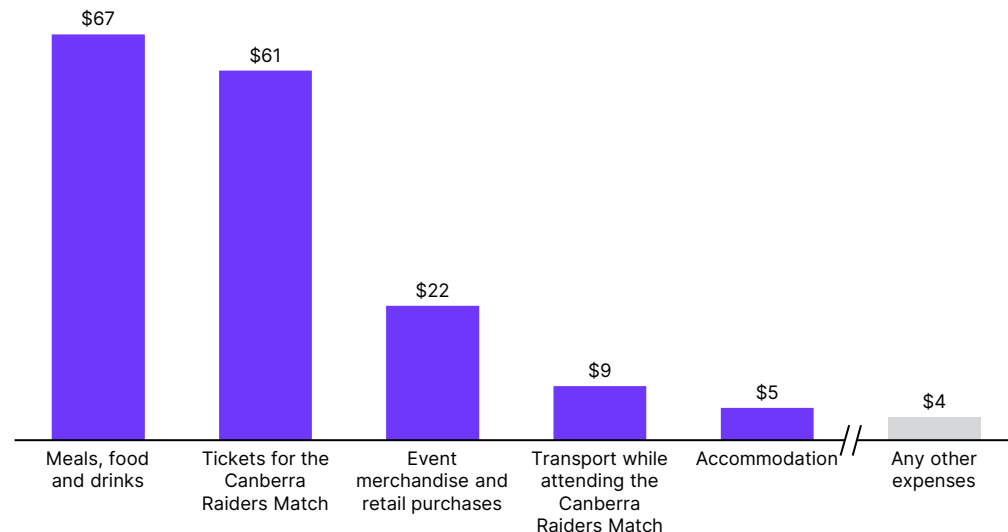
Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 986 Visitors to Canberra = 301. Local Residents = 685

Local Average Spend \$65 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 2022 Canberra Raiders Home Games

\$ | ACT Residents



Source: Canberra Raiders Attendance Survey: n = 986. Local Residents = 685

Local Residents

\$65

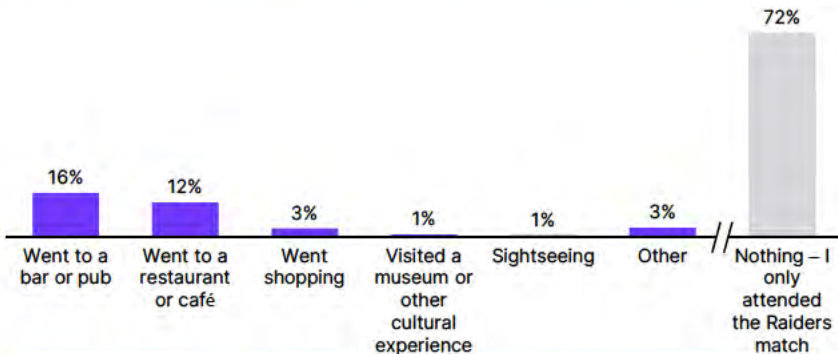
Per person expenditure

Local resident per person expenditure as a result of 2022 Raiders home games.

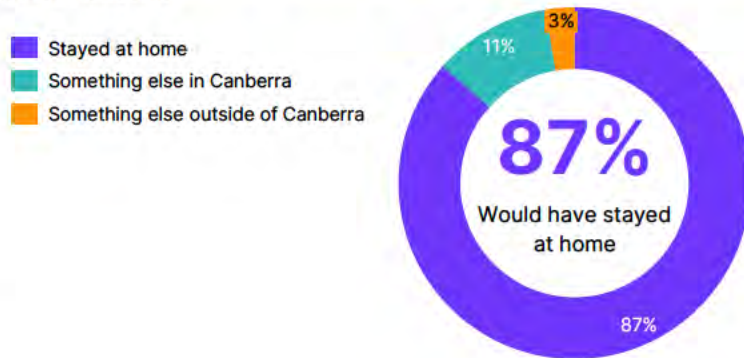
This is calculated based on an average group size of 2.6 people and group expenditure of \$168.

Local Perception of Raiders Match in ACT⁶²

Leisure Activities whilst in ACT for Raiders Home Games % ACT Residents



What local residents would have done instead of attending % ACT Residents



99%

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



86%

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 = 986. Local Residents = 685

Raiders Players are Positive Role Models

63

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

79%
Yes



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

"Community and charity work by players is great. It gives you a sense of pride supporting a team that does stuff like that."

"The current Raiders playing group is made up of talented footballers who care a lot about representing Canberra. I think the players we have now are unique in the League for their willingness to give time to the community and their supporters."

"They can create positivity in the community and common interest while making everyone feel part of the club."

"They're representing our home. And every Raider's player I've met have always been polite, caring and friendly."

"They encourage a healthy active lifestyle and a positive community spirit."

Source: Canberra Raiders Attendance Survey: n = 986. Local Residents = 685

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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



63% Male



37% Female

Household Status



Single

11%



Couple

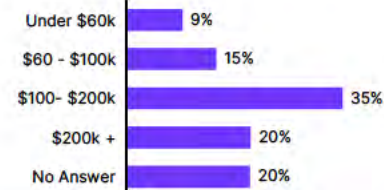
24%



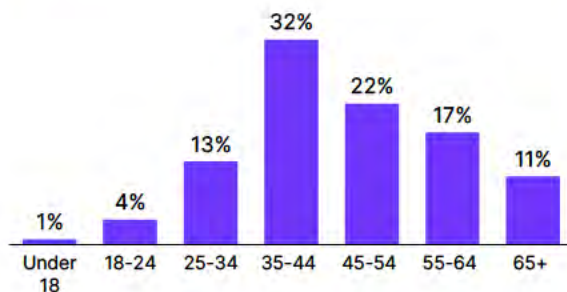
Family

57%

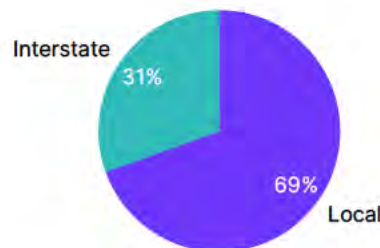
Household Income



Age



Location



Employment Status

66%
Working Full
Time



Source: Canberra Raiders Attendance Survey: n = 986

Sch 2.2(a)(xi)





**GWS Giants Economic Impact &
Attendee Research Report**

November 2022

Project Overview

Nielsen Sports was commissioned by the GWS Giants to conduct a study of the economic & community impact of matches played in Canberra for the 2022 season.

The report includes:

- Gross economic impact to the Canberra region from the staging of 2022 GWS Giants home matches played in Canberra. Gross Economic Impact includes direct expenditure only.
- The community impact of Giants 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 Giants sponsors.

Nielsen Sports was responsible for the questionnaire design, survey scripting and hosting online, data analysis and reporting. GWS Giants were responsible for distributing an email invitation to complete the survey to their attendee database. To complement the online survey, an intercept survey was conducted at one match too which drive increases in in-scope sample size.

Survey Type	Completes
Online Survey	462
Intercept Survey	379



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ACT Sport & Recreation

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Executive Summary: Key Metrics



Prompted Partner Recall 44%

Prompted Recall of
CBR Partnership

When asked to recall sponsors of the GWS Giants, 44% of respondents noted CBR.



Economic Impact Insights \$2.2M

Injected into the Canberra
economy by visitors

A total of 9,153 In-Scope visitors spent money within the Canberra/ACT area as a result of attending Giants fixtures, with an average of \$163 per day spent by overnight visitors.



Community Sentiment Insights 86%

Said they'll advise others to
come to Canberra

86% of attendees stated that they would advise others to come to Canberra. 10 percent of patrons stated that their visit changed their perception of Canberra for the better.

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Community Impact Sentiment

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Comparison of key metrics versus 2021

Economic Impact Key Figures

Input	2022	2021	2019	2018
Satisfaction	7.5	7.9	7.4	7.5
Match Attendance	39,209	19,627	39,749	41,701
In-scope Visitation (Incl. Day Trippers & Entourage)	9,153	6,547	12,088	8,364
Bed Nights	12,927	9,306	13,274	12,188
Direct Visitor Expenditure	\$2,165,319	\$1,474,068	\$2,423,381	\$2,132,569

Insights:

- GWS Giants 2022 matches in the ACT saw increased Direct Visitor Expenditure compared to 2021. This was driven by two more matches being held in Canberra with match attendance up 100% causing in scope visitation to increase 40% and bed nights to increase 39%
- 2022 average length of stay was 1.79 nights, which is higher than the previous two years. Average overnight visitor spend was \$163, while Day Tripper spend was \$44.



+100%

Match Attendance



+40%

Visitors to the ACT



+39%

Visitor Nights in the ACT



+47%

Overnight Visitor Expenditure

Source: GWS Giants 2022 Attendance Survey, n=462, Attendance metrics provided by GWS Giants

Economic Impact Figures by Match

Total visitor expenditure eclipsed \$2.1 million across the 4 matches, with the match against Geelong generating the most visitor expenditure, \$694k

Economic Impact Key Figures by Match

Match	Visitor Type	# Of Visitors	Entourage	Total Visitors	Length of Stay	Bed Nights	Average Daily Spend	Total Visitor Expenditure
St Kilda	Day Tripper	575	0	575	NA		\$42.92	\$24,673
	Overnight	2,260	69	2,329	1.78	4,139	\$158.71	\$656,905
Geelong	Day Tripper	680	0	680	NA		\$39.81	\$27,090
	Overnight	2,165	56	2,221	1.71	3,794	\$175.70	\$666,576
Brisbane	Day Tripper	360	0	360	NA		\$61.67	\$22,227
	Overnight	1,379	40	1,419	1.89	2,684	\$155.15	\$416,475
Fremantle	Day Tripper	307	0	307	NA		\$44.67	\$13,691
	Overnight	1,226	36	1,262	1.83	2,310	\$146.20	\$337,683
Total		8,953	201	9,153	1.79	12,927		\$2,165,319

Source: GWS Giants 2022 Attendance Survey, Interstate visitors n=135, Attendance metrics provided by GWS Giants

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Comparison of key metrics versus 2021

The average length of stay this year was 1.74 nights, exceeding the previous 2 years. Average accommodation spend per person per night was \$79

Economic Impact Key Figures by Match Year on Year

	2018				2019				2021		2022			
Average Nights														
Average Length Of Stay	1.67	1.56	2.05	2.18	1.50	1.54	1.47	1.56	1.63	1.65	1.78	1.71	1.89	1.83
Average Accom. Spend P/P/N	\$66.67	\$53.30	\$70.32	\$57.17	\$81.57	\$82.46	\$77.28	\$84.94	\$85.81	\$76.63	\$75.94	\$79.12	\$82.80	\$70.83
Overnight Travel Party	2.00	2.94	2.85	3.21	2.60	2.31	2.38	2.51	1.00	1.00	2.43	2.24	2.03	2.02

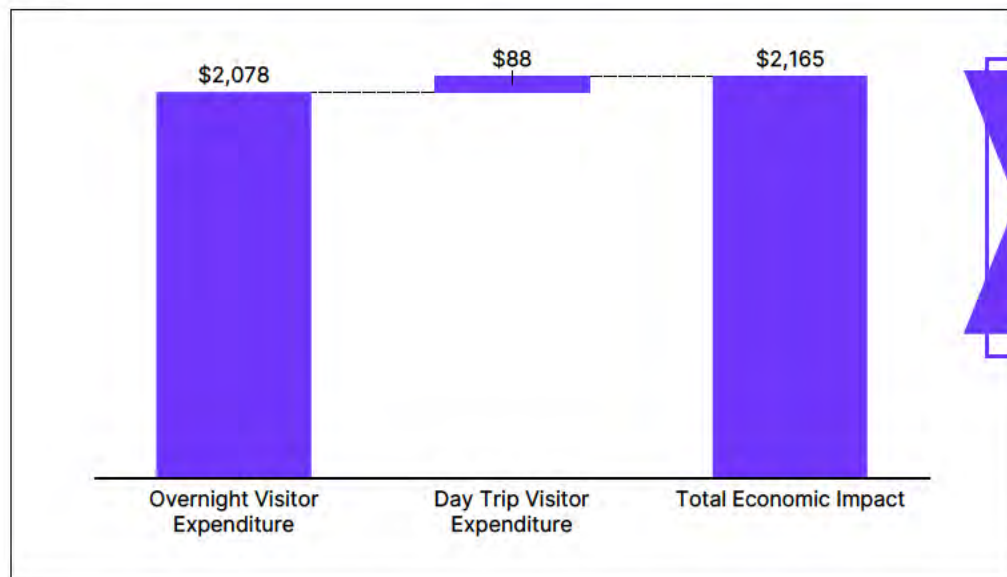
Source: GWS Giants 2022 Attendance Survey, interstate visitors n=135, Attendance metrics provided by GWS Giants

Total Direct Economic Impact

A direct economic impact of \$2.2 million was recorded for the GWS Giants matches this year; \$2.1 million of which was sourced from overnight visitation

Total Economic Impact

\$000s



\$2,165, 319
**TOTAL DIRECT ECONOMIC
IMPACT
(OVERALL ECONOMIC BENEFIT)**

Source: GWS Giants 2022 Attendance Survey, interstate visitors n=135, Attendance metrics provided by GWS Giants

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Executive Summary

Economic Impact

**Event Experience &
Satisfaction**

Community Impact Sentiment

Sponsor Recall & Perception

AFL Women's Insights

ACT Sport & Recreation

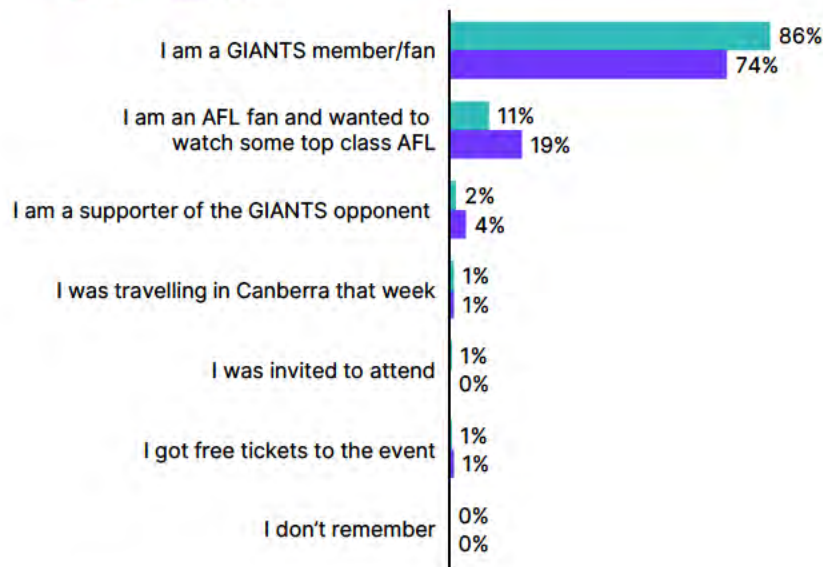
Appendix

Drivers of Attendance Summary

91% of attendees said they would likely attend another GWS Giants game in Canberra again, whilst 85% said they are likely to recommend a GWS Giants game to friends or colleagues

Drivers of Attendance

2021 2022



18%

Said it was better than expected
Down 1% pts v 2021

91%

Would definitely / probably attend again
Down 5% pts v 2021

85%

Are likely to recommend a GWS GIANTS game in Canberra
Score of >6, Down 8% pts from 2021

8.2

Average recommendation score
Down 0.2 from 2021

36%

Visited the Manuka Shops precinct pre or post game
Up 5% pts from 2021

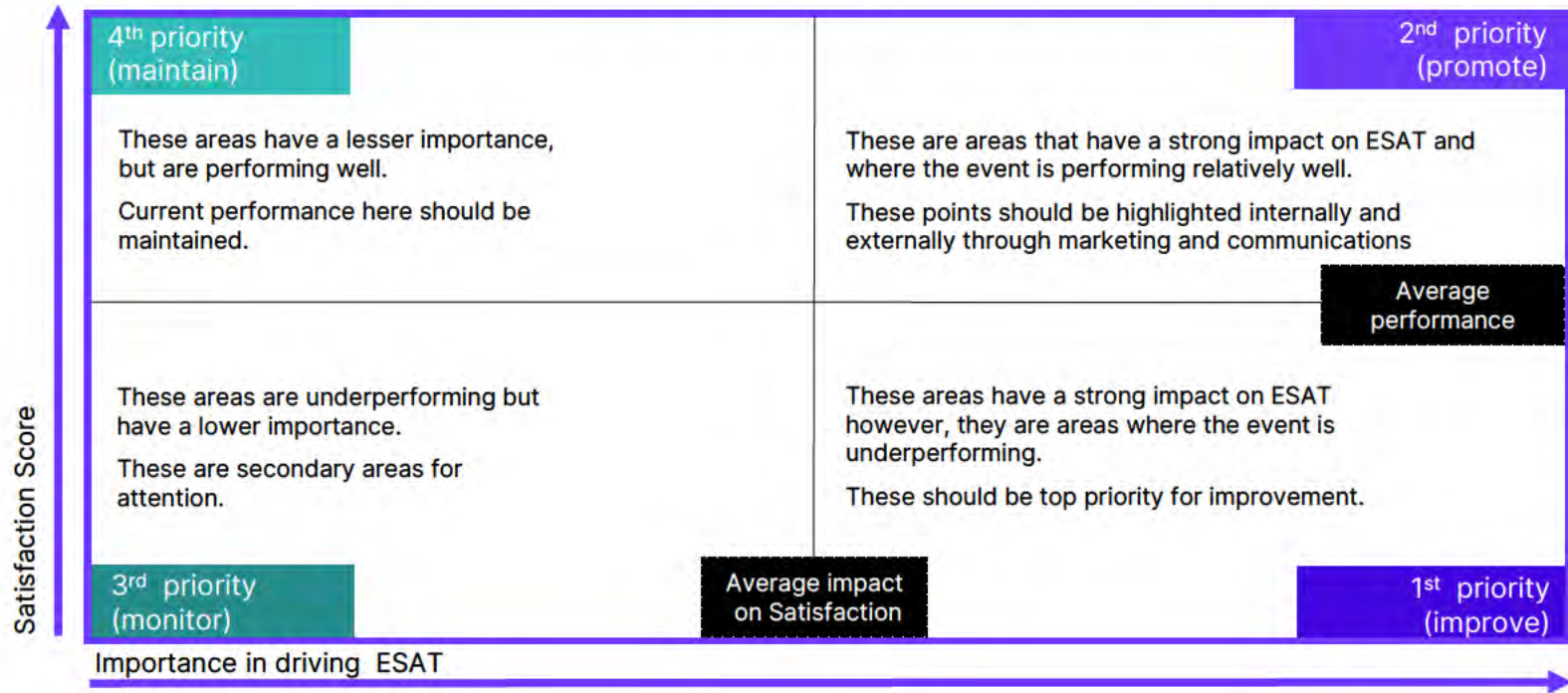
14%

Would be interested and consent to hearing about corporate offers

Source: GWS Giants 2022 Attendance Survey, n=462

Nielsen Impact Matrix

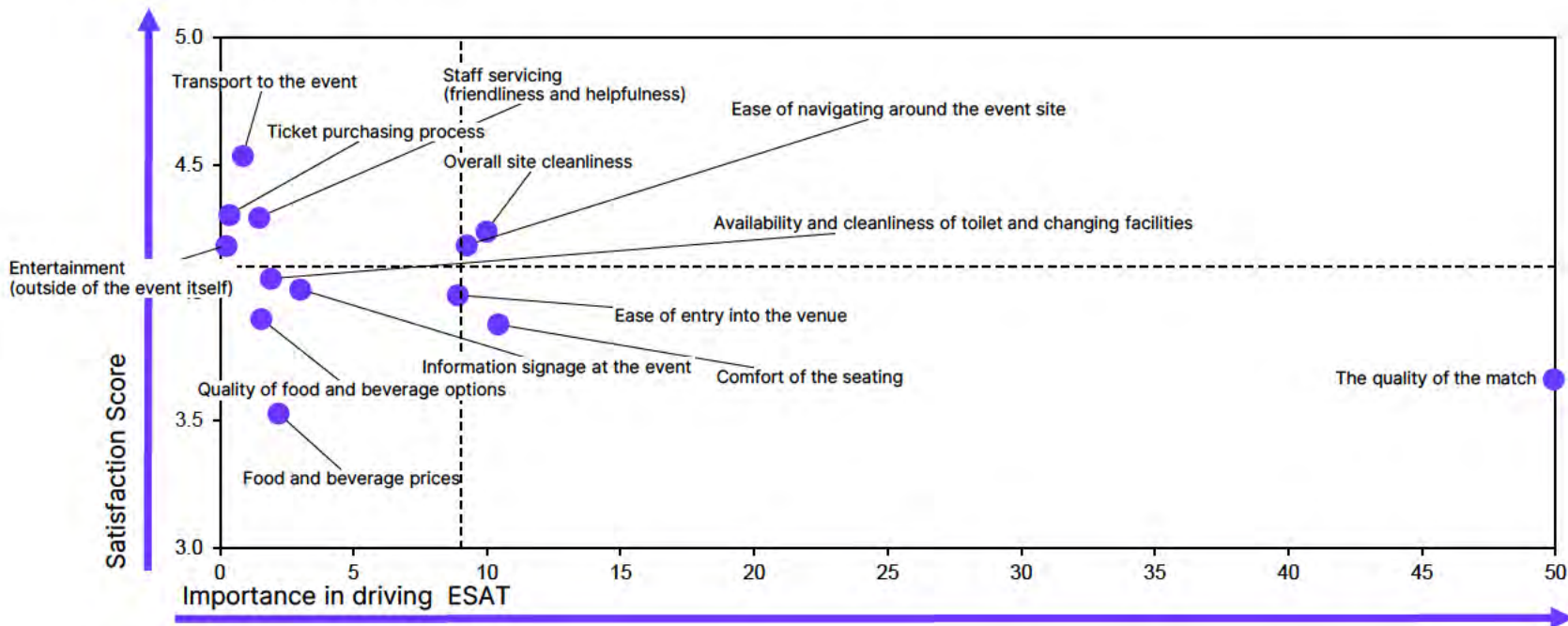
The matrix allows the GWS Giants to prioritise which areas should be a focus in the future



Source: GWS Giants 2022 Attendance Survey, n=462

Nielsen Impact Matrix

When taking into account all event elements, the quality of the match remains the biggest driver of event satisfaction



Source: GWS Giants 2022 Attendance Survey, n=462

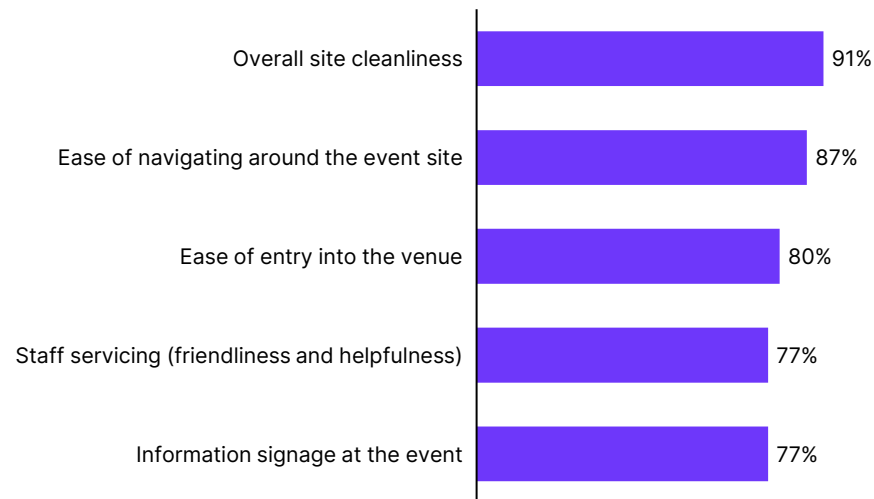
Attendance Satisfaction Summary

Giants games this year received an average satisfaction score of 7.5, slightly lower than 2021, with 91% of attendees expressing satisfaction with the over cleanliness of the event

Overall Satisfaction of Attendees



Top Five Elements (Net Satisfied + Very Satisfied)

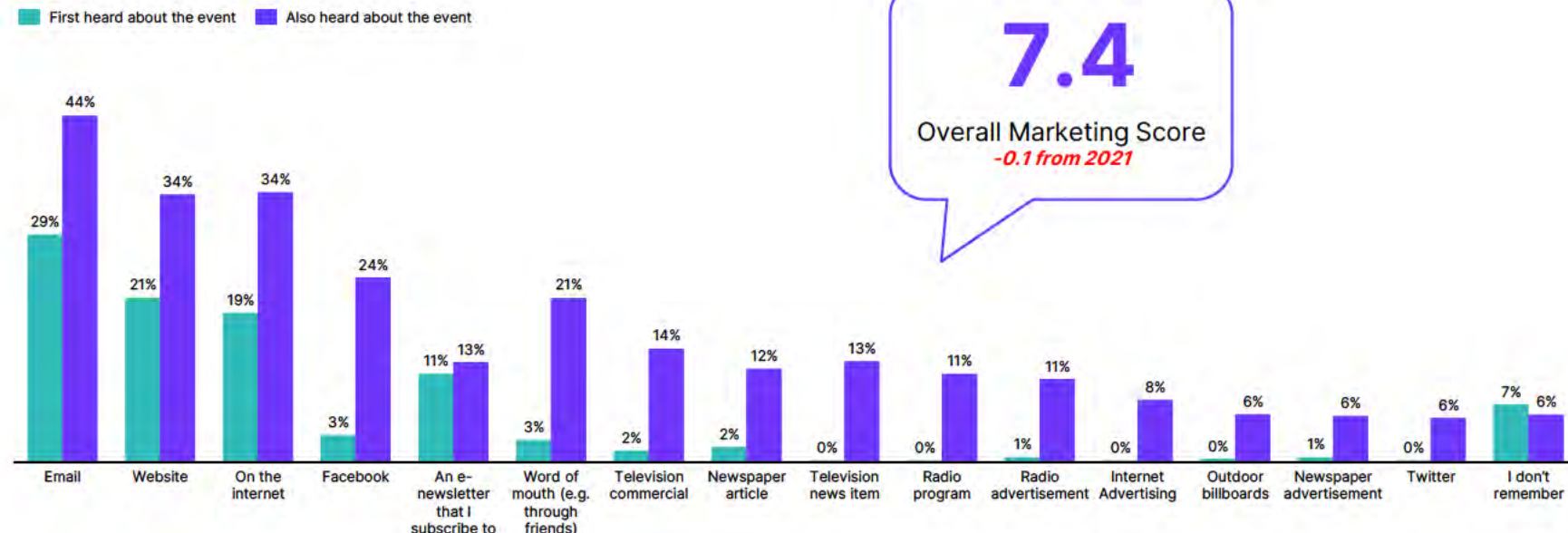


Source: GWS Giants 2022 Attendance Survey, n=462

Marketing Summary

Email was the main driver of initial awareness and follow up awareness for the Giants games in Canberra

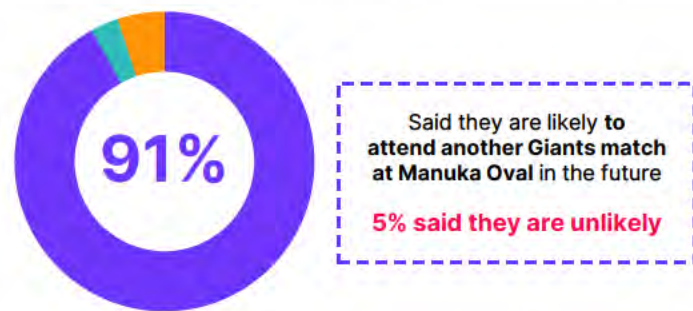
Sources of Information for Hearing about Event



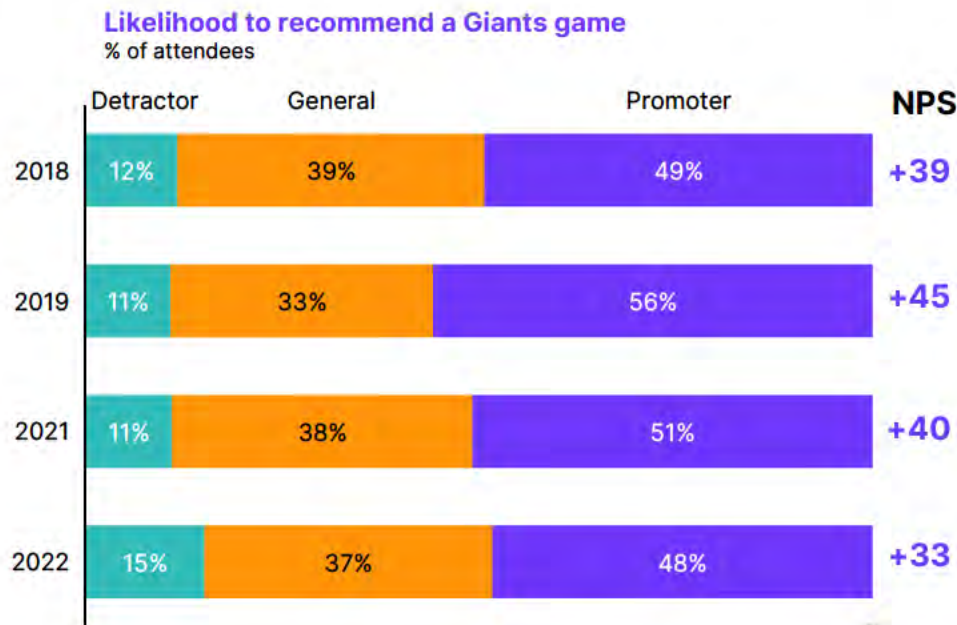
Source: GWS Giants 2022 Attendance Survey, n=462

Net Promoter Score Summary

48% of event attendees are classified as promoters, with the Giants' games receiving a Net Promoter Score of 33 (down 7 points from last year)



LIKELY   5% pts on 2021
 NEUTRAL   1% pts on 2021
 UNLIKELY   3% pts on 2021



Source: GWS Giants 2022 Attendance Survey, n=462

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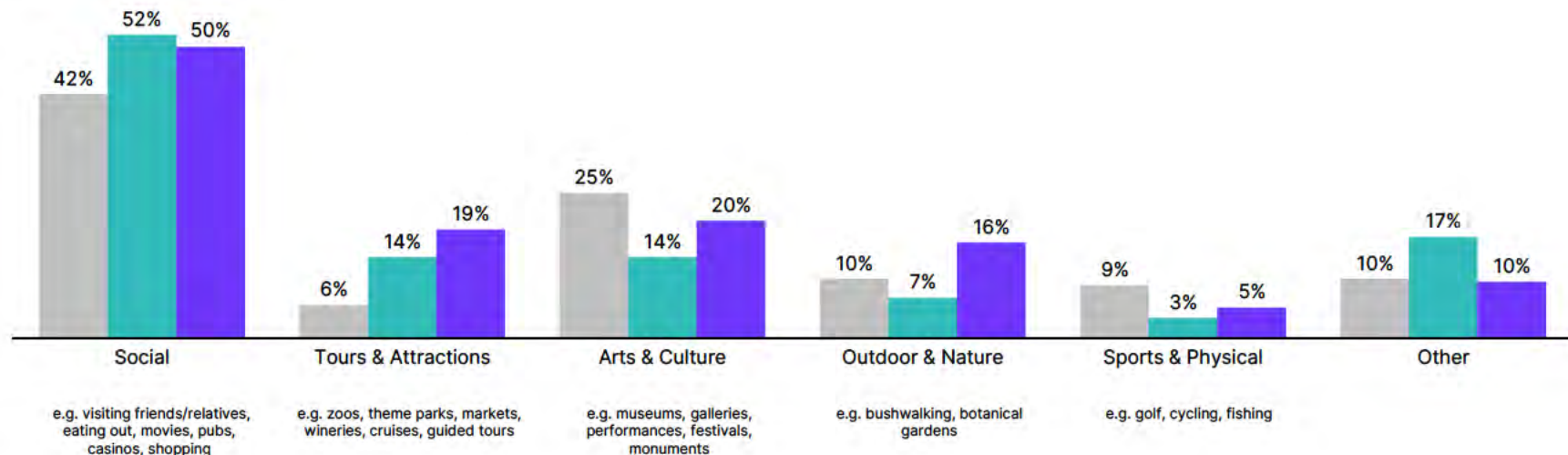
Other Activities Summary

The number of attendees who undertook activities to do with Tours/Attractions, Arts & Culture, Outdoor & Nature and Sports & Physical have all increased YOY

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

% of Interstate Visitors

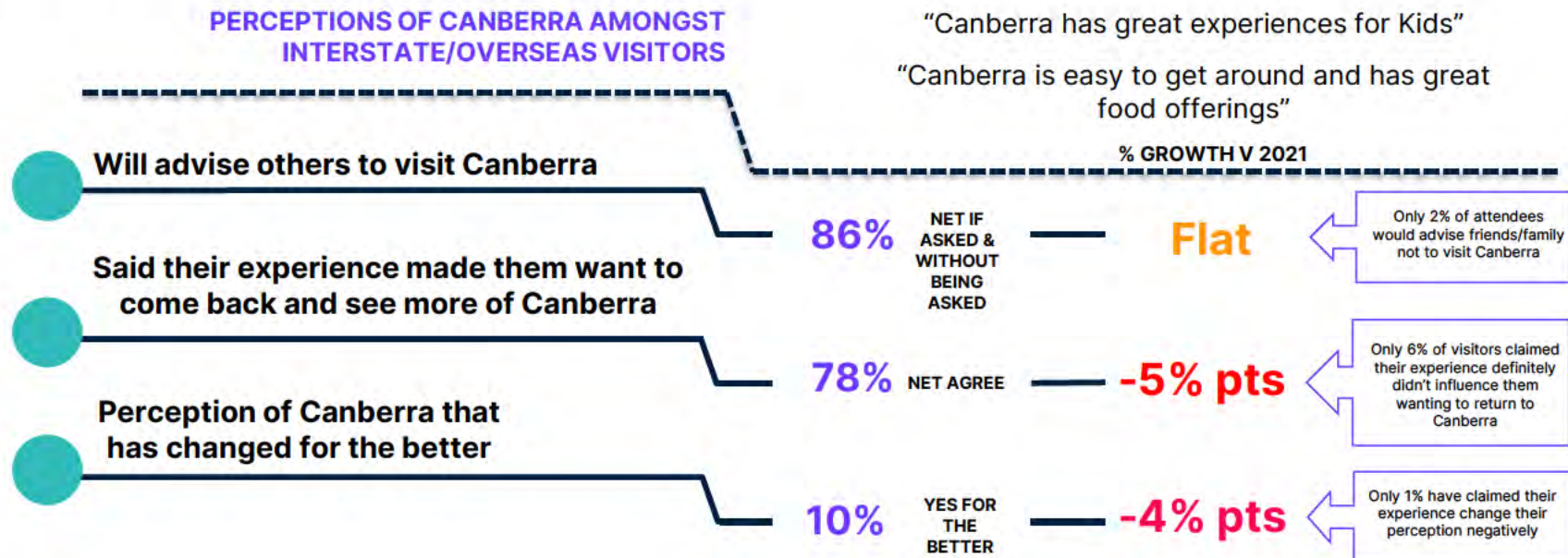
■ 2019 ■ 2021 ■ 2022



Source: GWS Giants 2022 Attendance Survey, Interstate Visitors n=135

Advocacy of Canberra Summary

86% of attendees will advise other to visit Canberra based on their experience at the Giants' matches this year



Source: GWS Giants 2022 Attendance Survey, Interstate Visitors n=135

Community Metrics Summary

89%

(-4% pts v 2021)

It helps enhance community spirit, pride and enjoyment

77%

(-3% pts v 2021)

It makes me proud to be from Canberra / ACT

78%

(-8% pts v 2021)

Having it in Canberra creates a real buzz in the city

92%

(-4% pts v 2021)

It helps make Canberra / ACT a more enjoyable place to live



92%

(-3% pts v 2021)

It is well-liked and positively embraced by the people of Canberra / ACT

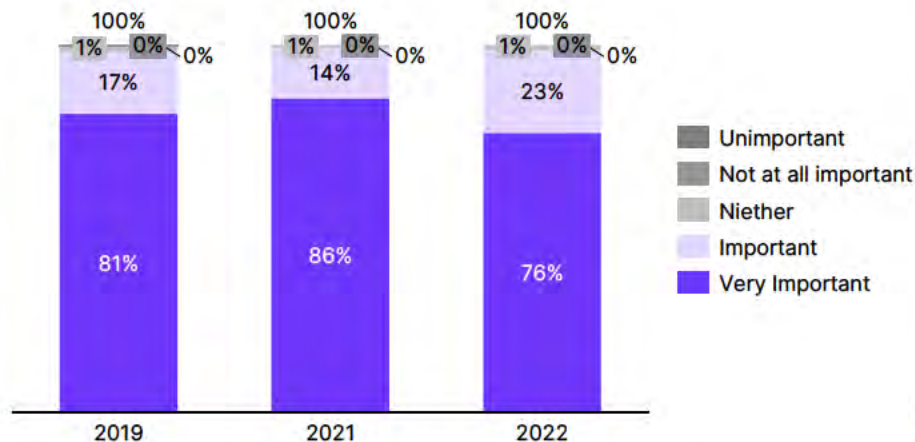
62% agreed that Giants players are positive role models in the community

Source: GWS Giants 2022 Attendance Survey, Locals n=327

Giants' Games Importance Summary

99% of attendees believe it is important that Canberra/ACT continue to host Giants' games in the future, whilst 90% believe the government needs to be involved in doing so

Importance of hosting Giants' games in Canberra/ACT
% of Locals

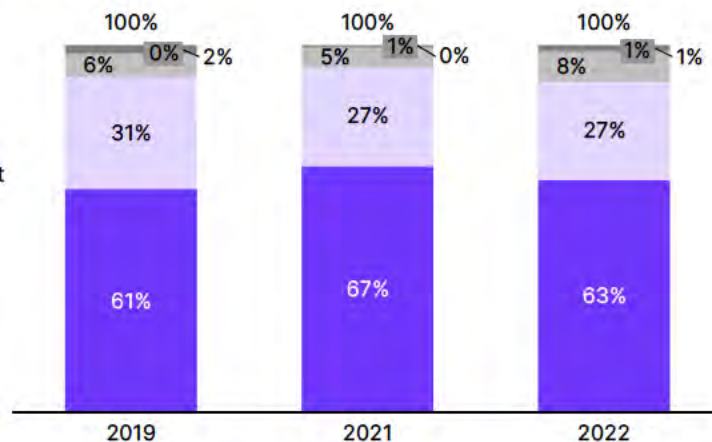


99%

Net Agree

Flat YOY

Importance of ACT Govt. Involvement in hosting Giants' Games in Canberra/ACT
% of Locals



90%

Net Agree

-3% pts YOY

Source: GWS Giants 2022 Attendance Survey, Locals n=327

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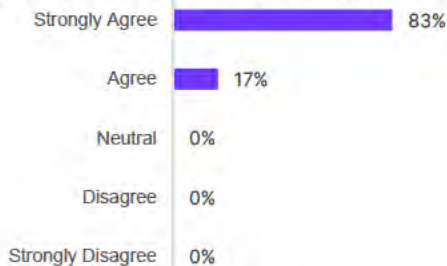
Appendix

AFLW Summary

Q. Did you attend the AFL Women's game GIANTS vs Carlton, 27th February 2022 at Manuka Oval?



Q. I would encourage friends and family to attend professional women's sporting events in the future



Q. Please indicate your agreement with the following statements regarding AFL Women's GIANTS matches held in Canberra:

Canberra was a great location for hosting the AFL women's games



Net Agree
(Strongly Agree/Agree)

80%

Hosting the AFL Women's in Canberra was well-liked and positive for the state



73%

Women's sport should be better supported than it currently is



79%

The AFL Women's games held in Canberra enhanced the overall competition



71%

Having the AFL Women's play in Canberra is great for women's sport



88%

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Source: GWS Giants 2022 Attendance Survey, AFLW attendees n=63

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ACT Sport & Recreation Key Metrics

 	Total
Survey Sample Size	462
Economic Impact (Visitor Expenditure)	\$2,165,319
Economic Activity (Local)	\$1,778,125
Visitation	9,153
Ticketed Attendance	39,209
Bed Nights	12,927
Ave. Visitor Length of Stay	1.79
Ave. Visitor Daily Spend	\$128.85
Ave. Local Spend per Person	\$62.50
Likelihood of Return Visit	91%
Net Promoter Score	33
Enhances community spirit, pride, & enjoyment	89%
Event Satisfaction Rating	7.5
Overall Marketing Score	7.4

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
129	94	35	0	327
\$2,165,319	\$2,077,638	\$87,681	\$0	
				\$1,778,125
9,153	7,231	1,922	0	
	8,953		0	28,450
12,927	12,927		0	
	1.74	0	0	
	\$162.74	\$43.63	0	

Source: GWS Giants 2022 Attendance Survey, n=462, Attendance metrics provided by GWS Giants

Giants Economic Impact: YoY Analysis

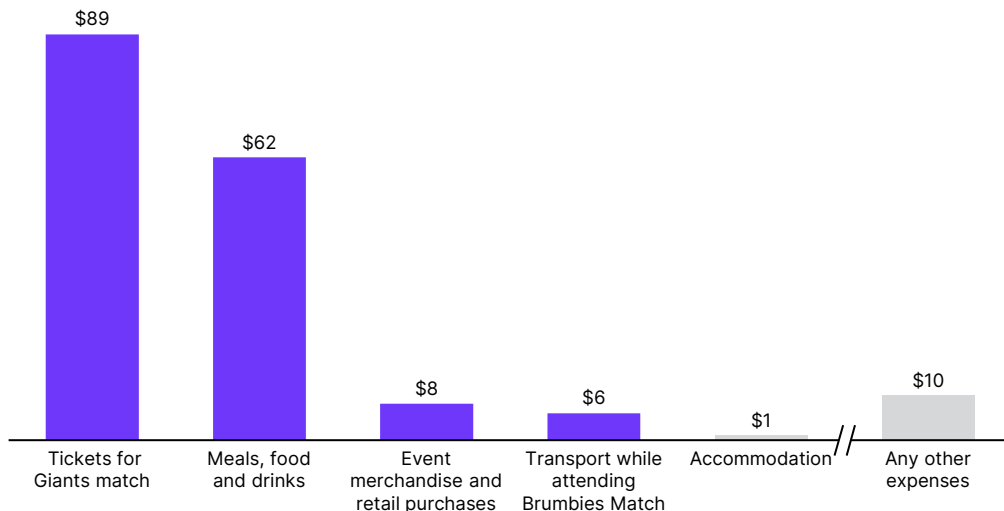
- Total direct expenditure has remained on par with 2019 despite less in-scope visitors; due to a higher average daily spend.
- Nielsen Sport has observed a decrease in average daily spend across multiple projects. For 2022; overnight in-scope visitor spend has increased (\$163 '22 v \$151 '21); whilst daytripper daily spend has decreased (\$44 '22 v \$77 '21). Meals, food and drinks was the key category that drove the decrease in daytripper spend. This can be attributed due to external circumstances including increasing costs of living as well as COVID-19.
- The 2021 GWS Giants Economic Impact study recorded only 181 total respondents; 27 of which were in-scope. This represents research accuracy to +/- 7% at a 95% confidence level. The 2022 GWS Giants Economic Impact Study recorded 462 total respondents; 129 of which were in-scope. This represents research accuracy to +/- 4% at a 95% confidence level. This year's sample size was more robust and indicates more accurate results than previous studies.

Local Average Spend \$63 per person

Tickets for the Giants matches was the main source of group expenditure among ACT residents; followed by meals, food and drinks

Average Local Group Expenditure as a Result of 2022 GWS Giants Home Games

\$ | ACT Residents



Local Residents

\$63

Per person expenditure

Local resident per person expenditure as a result of 2022 Giants home games.

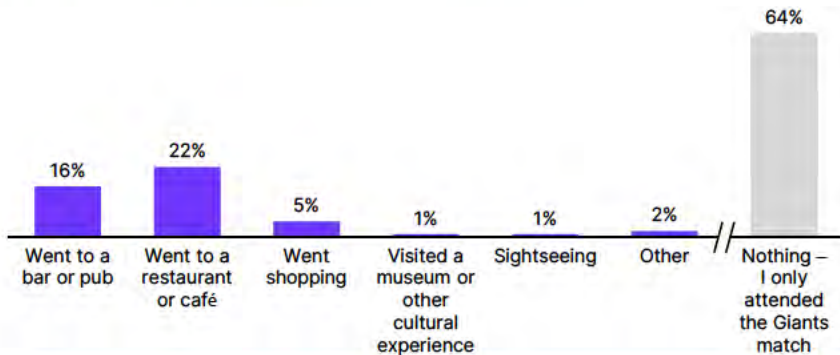
This is calculated based on an average group size of 2.8 people and group expenditure of \$175.

Source: GWS Giants 2022 Attendance Survey, Locals n=327

Local Perception of Giants Match in ACT 98

Leisure Activities whilst in ACT for Giants Games

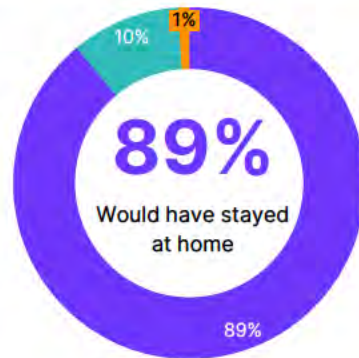
% ACT Residents



What local residents would have done instead of attending

% ACT Residents

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



99%



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

90%



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

Source: GWS Giants 2022 Attendance Survey, Locals n=327

Giants Players are Positive Role Models

Do you see the GWS Giants players as positive role models in the community?

62%
Yes

(30% Unsure)



Why do you see the GWS Giants players as positive role models in the community?

"They actively engage with community groups"

"They inspire the young ones to play AFL and get involved in team sports"

"Great role models for young people growing up around Canberra"

"Undertake initiatives like the Helping Hand which shows they care about the communities they are involved in"

"Yes, people look to them as community leaders"

Source: GWS Giants 2022 Attendance Survey, Locals n=327

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GWS Giants Attendee Profile

Giants attendees are more likely to be male, aged between 55-64 and working full time; with a household income between \$100k - \$200k

Gender



65% Male



35% Female

Household Status



Single
12%

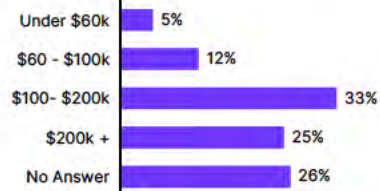


Couple
24%

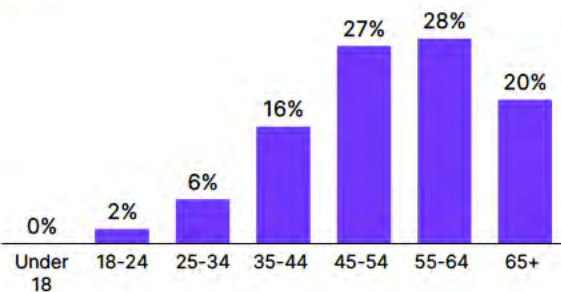


Family
58%

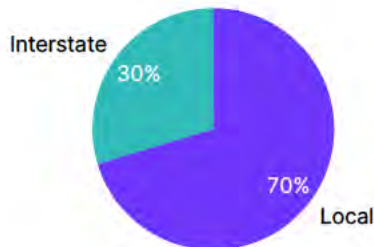
Household Income



Age



Location



Household

58%
Working Full Time



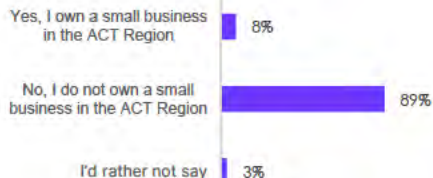
Source: GWS Giants 2022 Attendance Survey, n=462

Further GWS Giants Demographics

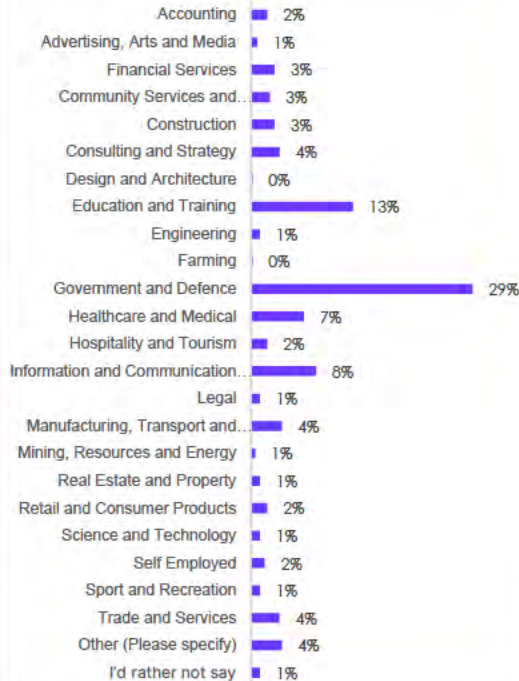
Q. Which of the following best describes your current situation?



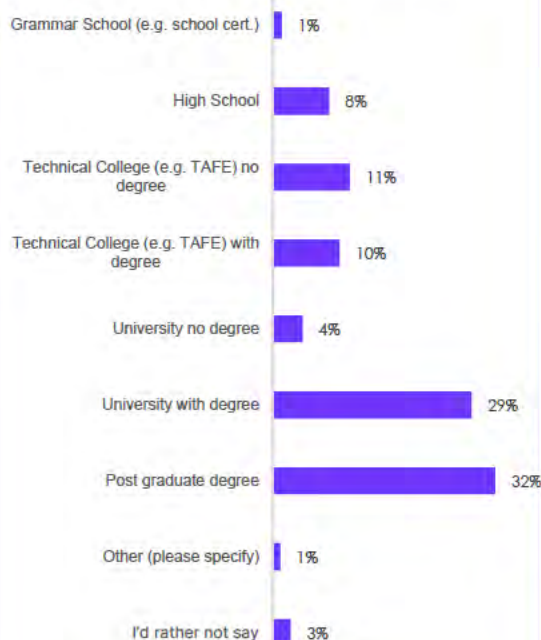
Q. Do you own a small business in the ACT Region?



Q. Which best describes the industry/sector you currently work in?



Q. What is the highest level of education you have received?

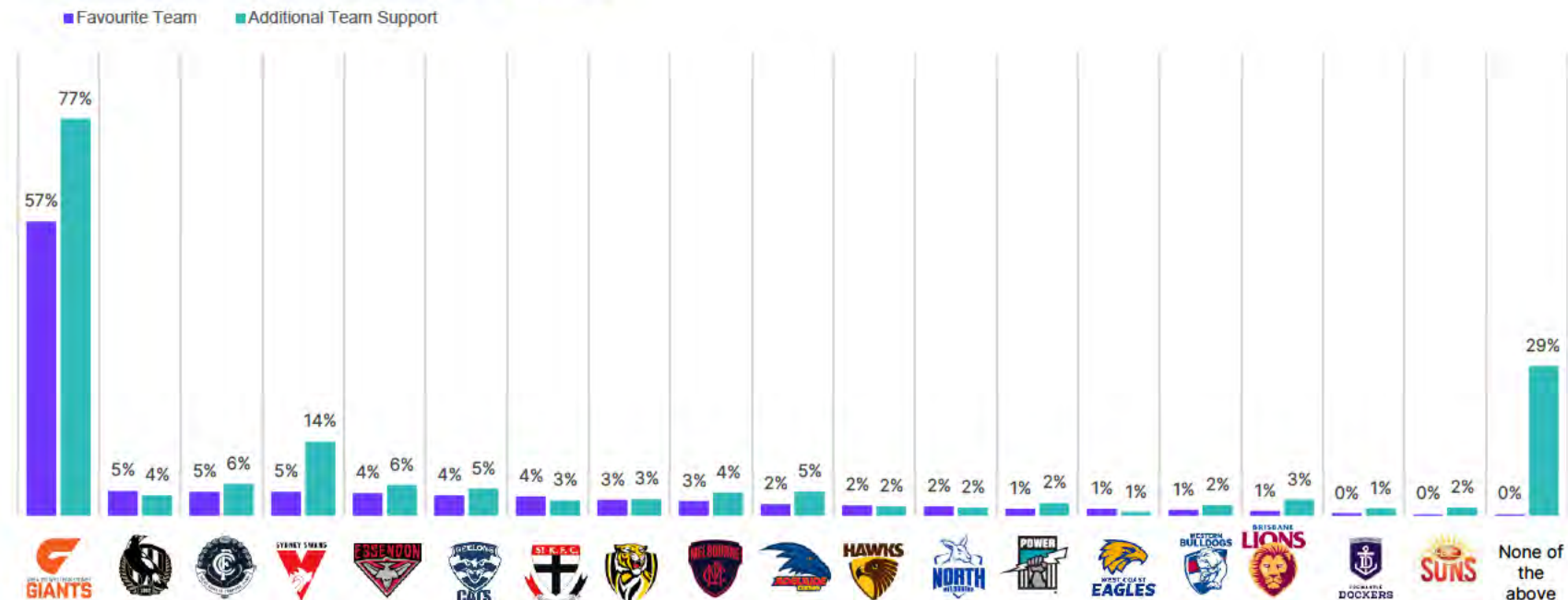


Source: GWS Giants 2022 Attendance Survey, n=462

Favourite AFL Team

103

Favourite AFL Team and Additional Team Support



Source: GWS Giants 2022 Attendance Survey, n=462

2021 ACT Sport & Recreation Key Metrics ¹⁰⁴

 	Total
Survey Sample Size	181
Economic Impact (Visitor Expenditure)	\$1,474,068
Economic Activity (Local)	\$818,708
Visitation	6,547
Crowd	19,627
Bed Nights	9,306
Ave. Visitor Length of Stay	1.7
Ave. Visitor Daily Spend	\$144.80
Ave. Local Spend	\$64.79
Likelihood of Return Visit	83%
Net Promoter Score	40
Enhances community spirit, pride, & enjoyment	93%
Event Satisfaction Rating	7.9
Overall Marketing Score	7.5

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
27	24	3	0	152
\$1,474,068	\$1,407,074	\$66,994	\$0	
				\$818,708
6,547	5,673	874	0	
	6,991		0	12,636
9,306	9,306		0	
	1.7	1	0	
	\$151.19	\$76.67	\$0.00	

Source: GWS Giants 2021 Attendance Survey, n=181, Attendance metrics provided by GWS Giants

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ACT BRUMBIES ECONOMIC IMPACT REPORT – MEN & WOMEN

Economic Impact & Attendee Research Report



August 2023

Project Overview

Nielsen Sports was commissioned by the ACT Brumbies to conduct a study of the economic & community impact of matches played in Canberra for the 2023 season.

The report includes:

- Gross economic impact to the Canberra region from the staging of both the men's and women's 2023 ACT Brumbies home matches for the regular season. Gross Economic Impact includes direct expenditure only.
- The community impact of Brumbies 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 Brumbies sponsors.

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

Survey Type	Completes
Online Survey	981
Intercept Survey	448



Executive Summary

Partner Recall

Economic Impact – Men's

Economic Impact – Women's

Community Sentiment

ACT Sport & Recreation

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Executive Summary: Key Metrics



Partner Recall

42%

Attendees aware of
Safeguard Global

When asked unprompted to recall sponsors of the ACT Brumbies, 42% of respondents noted Safeguard Global. Prompted awareness is 25 percentage points higher at 67%.



Economic Impact Insights

\$4.0M

Injected into the Canberra
economy by visitors

For men's matches, total direct visitor expenditure was \$3.8 million as a result of 11.6k in-scope visitors. For women's matches, total direct visitor expenditure was \$238k as a result of 819 in-scope visitors.



Community Sentiment Insights

82%

Said their experience made them
want to see more of Canberra

82% of attendees stated that their experience made them want to come back and see more of Canberra, on par with 2022. 14% of visitors said their perception of Canberra changed for the better, 1 percentage point higher than last year.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

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Partner Recall

Economic Impact – Men's

Economic Impact – Women's

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Partner Recall

Economic Impact – Men's

Economic Impact – Women's

Community Sentiment

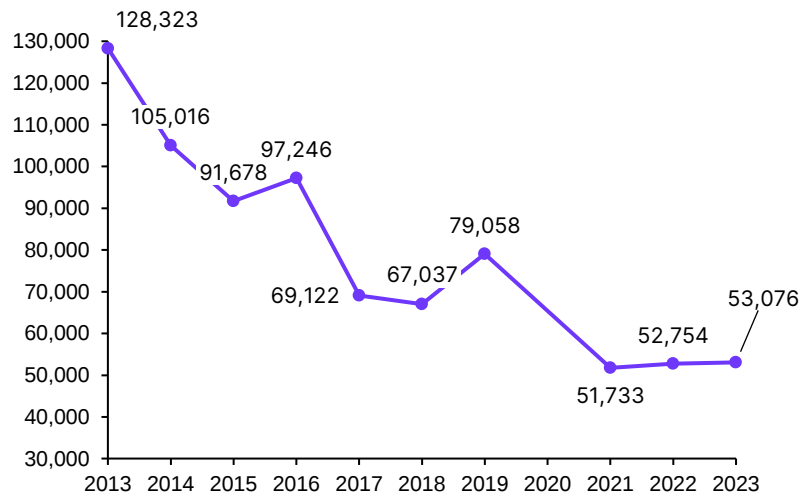
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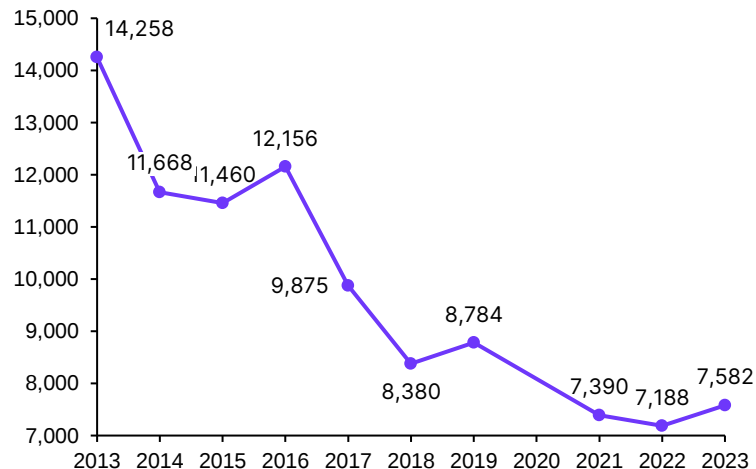
Attendance Summary

Both cumulative and average attendance increased compared to 2022, with cumulative attendance continuing to grow post COVID (2021 onwards)

Cumulative Attendance by Season



Average Attendance by Season

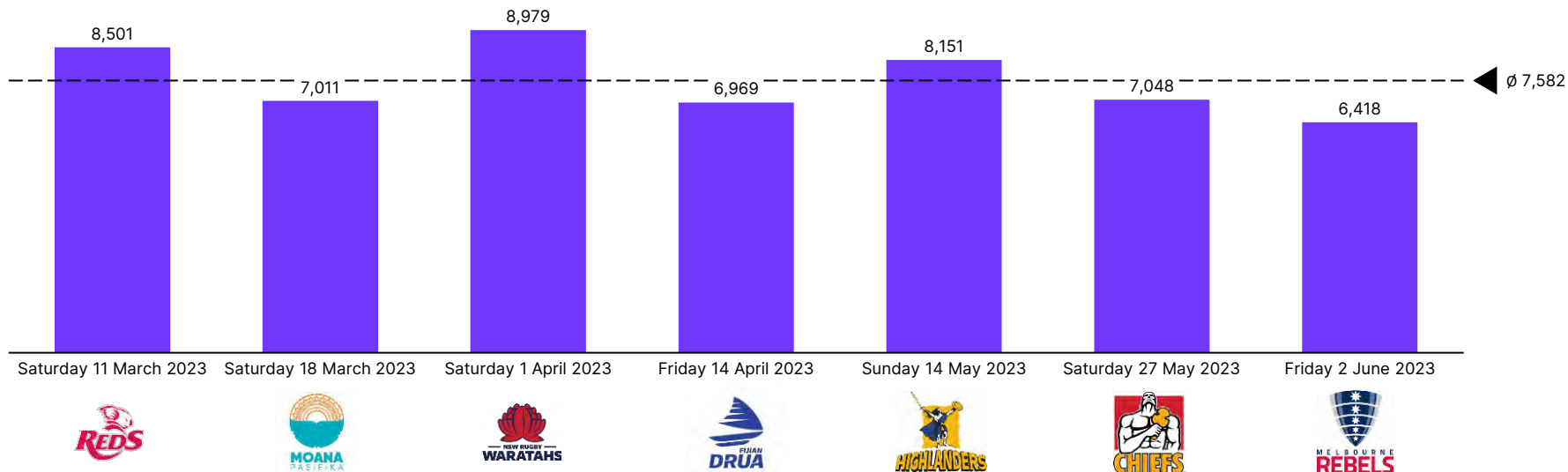


Source: ACT Brumbies Ticketing Information.

Attendance Summary by Match

The match between the Brumbies and the Waratahs on the 1st April generated the largest attendance for the season at 8,979

Attendance by Fixture



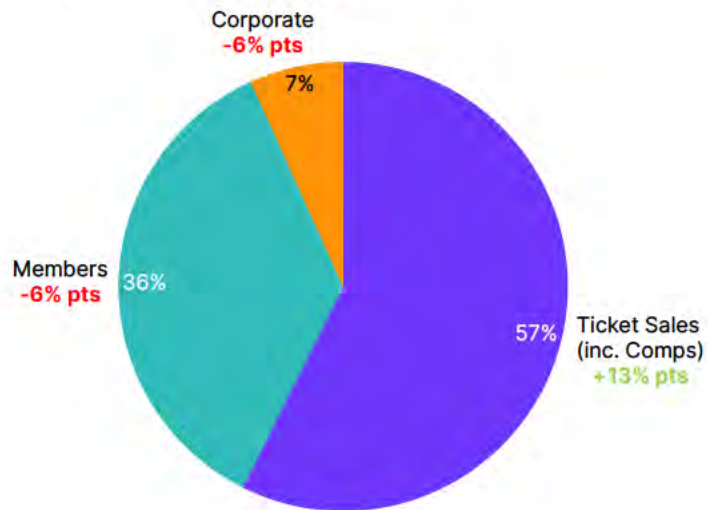
Source: ACT Brumbies Ticketing Information.

Growth in number of member tickets

The number of ticket sales has increased by 13 % pts year-on-year, indicating attendees are more likely to purchase tickets on a game-by-game basis rather than a membership

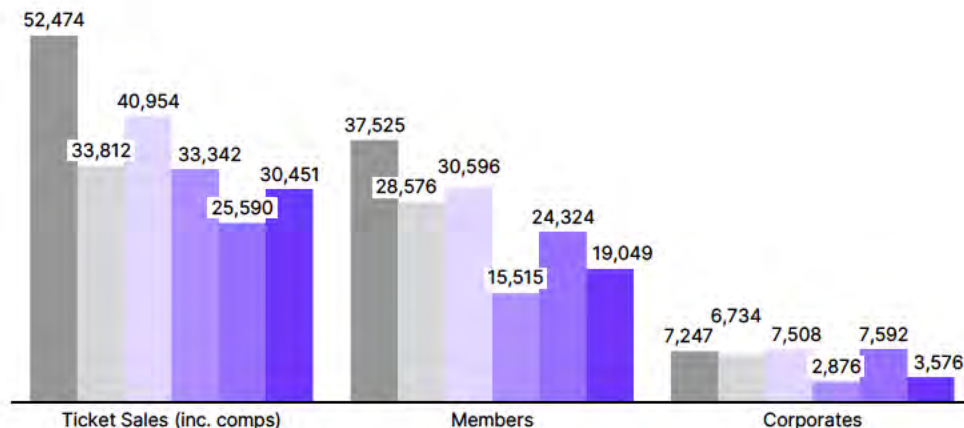
Attendance Type – Share of Voice

%



Attendance Type – Year on Year

2017 2018 2019 2021 2022 2023



Source: ACT Brumbies Ticketing Information.

11k In Scope* visitors to Canberra

Approximately 21% of attendees were from outside of the ACT, equating to 11,145 visitors

Assumptions and Definitions:

- » Attendee type data supplied by the Brumbies
- » Ticket sales origin calculated as an average from the Ticketek postcode report (ACT/Interstate split based off average of 2016-2019 numbers) and 2023 Intercept & Online Survey data
- » 91% of members live within the ACT and 9% Interstate (source - Brumbies Members registered address)
- » 84% of Corporate attendees from the ACT (sourced from Brumbies)
- » In scope is defined as those whose main driver for visiting or extending their visit to Canberra / ACT was attending a Brumbies Match derived from Nielsen Sports Economic Impact & Attendee Research Online Survey (n=981) and Intercept Survey (n=488)
- » Total in Scope Visitors does not include persons that accompanied survey participants on their trip to Canberra
- » The number of interstate visitors has increased slightly, indicating that travel is beginning to resume at pre-COVID levels

ATTENDEE TYPE	TOTAL ATTENDEES	% IN SCOPE	# IN SCOPE
ACT Ticket Sales	20,959	0.0%	0
ACT Members	17,335	0.0%	0
ACT Corporates	3,004	0.0%	0
Interstate/Overseas Ticket Sales	9,493	94.3%	8,956
Interstate Members	1,714	94.3%	1,617
Interstate Corporates	572	100.0%	572
Total	53,076		11,145

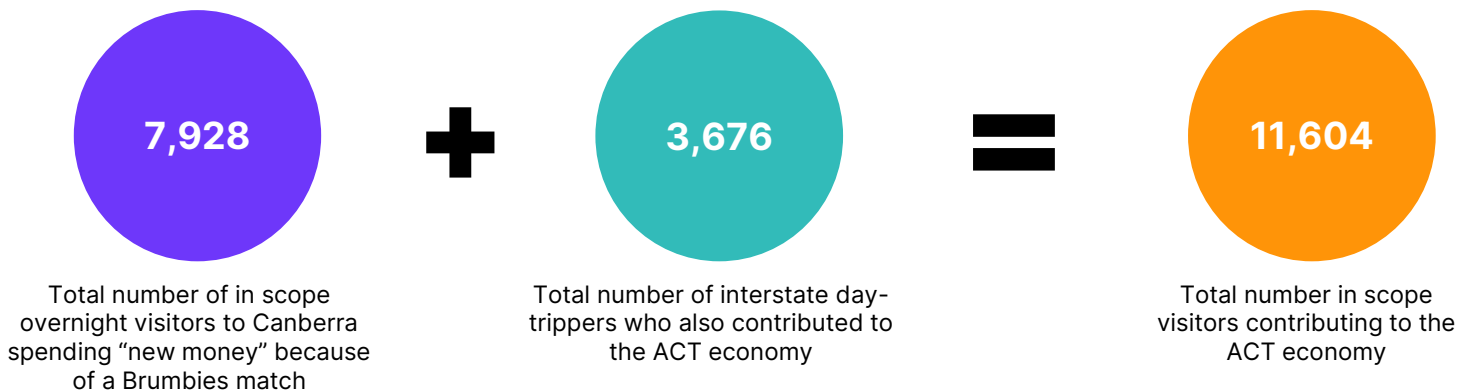
^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included. *Entourage not included in this metric.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

11,604 visitors to Canberra

An additional 459 people travelled to Canberra as a result of their travel party's intentions to attend a Brumbies match

ATTENDEE TYPE	TOTAL IN SCOPE ATTENDEES	IN SCOPE VISITOR TYPE	% VISITOR TYPE	# VISITOR TYPE	ACCOMPANYING PERSONS	TOTAL IN SCOPE VISITORS
Interstate/Overseas	11,145	Overnight	68%	7,562	367	7,928
		Daytrippers	32%	3,583	92	3,676
Total	11,145			11,145	459	11,604



[^] In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

\$3.8M spent in Canberra by visitors

Interstate overnight visitors stayed on average 2.47 nights and spent on average \$177 per day

ATTENDEE TYPE	TOTAL IN SCOPE VISITORS	AVERAGE LENGTH OF STAY	BED NIGHTS	AVERAGE DAILY SPEND	IN-SCOPE VISITOR SPEND
Interstate/Overseas Overnighters	7,928	2.47	19,546	\$177.40	\$3,467,523
Interstate Daytrippers	3,676	0.00	0	\$77.37	\$284,403
Total	11,604	2.47	19,546	\$145.72	\$3,751,926



^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

Increased Length of Stay YoY

OUTPUT	2023	2022	2021	2019	2018	2017	% DIFFERENCE 2023 TO 2022
Total attendance	53,076	52,754	51,733	79,058	67,037	69,122	1%
Outside of ACT attendance	11,779	11,391	13,443	18,285	16,870	12,253	3%
In Scope Visitors	11,604	11,416	13,148	17,889	16,064	10,584	2%
Overnight Split	68%	44%	47%	69%	54%	57%	54%
Avg. Length of Stay	2.47	1.93	1.80	1.96	1.67	1.42	28%
Bed nights	19,546	9,777	11,008	24,340	14,794	8,542	100%
Avg. Daily Spend	\$145.72	\$107	\$213	\$182	\$183	\$164	36%
In-Scope visitor spend	\$3,751,926	\$2,051,929	\$2,678,294	\$4,652,396	\$3,360,180	\$1,914,259	83%

ANALYSIS:

- All key metrics are up compared to 2022, reflective of the current climate and returning levels of travel post COVID-19. The total number of interstate attendees has grown by 3%, with in-scope visitors also increasing (+2%)
- As seen more broadly across the sporting landscape, average daily spend is up significantly (+36%), mirroring the rising cost of living
- The proportion of visitors who stay overnight has increased significantly (+68%), with this driving the overall uplift in visitor spend. This further reiterates sporting events are returning to pre-2020 levels; with intention to travel and stay overnight continuing to increase
- Average length of stay has increased by 28% compared to 2022; indicating that attendees are making the most of their trip to Canberra

^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

Executive Summary

Partner Recall

Economic Impact – Men's

Economic Impact – Women's

Community Sentiment

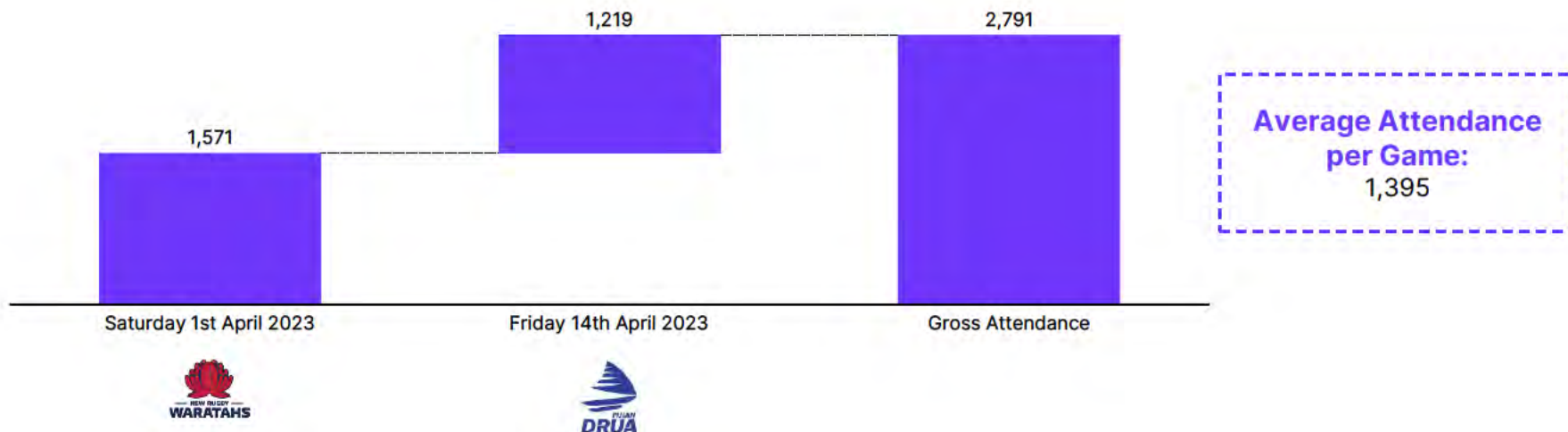
ACT Sport & Recreation

Appendix

Attendance Summary by Match

Gross attendance for Women's Brumbies matches was 2,791, with the match against the Waratahs on the 1st April generating the highest attendance at 1,571

Attendance by Fixture



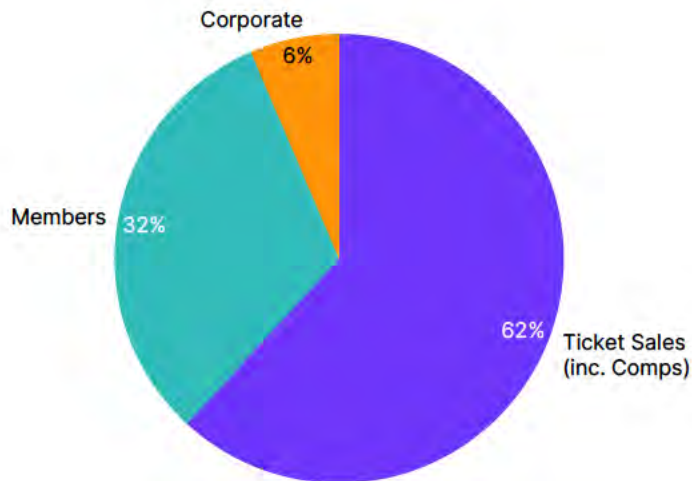
Source: ACT Brumbies Ticketing Information.

Ticket sales main source of attendance

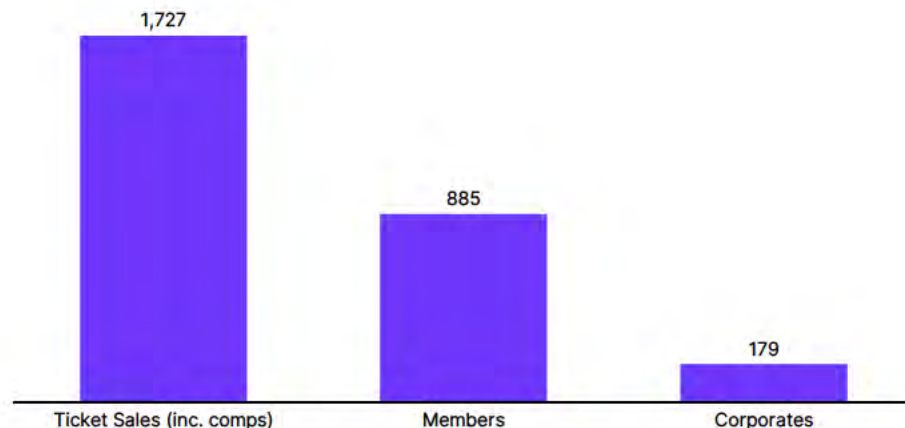
62% of attendance was sourced from Ticket Sales, with members accounting for 32% and corporate attendees 6%

Attendance Type – Share of Voice

%



Attendance Type – 2023



Source: ACT Brumbies Ticketing Information.

788 In Scope* visitors to Canberra

Approximately 28% of attendees were from outside of the ACT, equating to 788 visitors

Assumptions and Definitions:

- » Attendee type data supplied by the Brumbies
- » Ticket sales origin calculated as an average from the Ticketek postcode report (ACT/Interstate split based off average of 2016-2019 numbers) and 2023 Intercept & Online Survey data
- » 91% of members live within the ACT and 9% Interstate (source - Brumbies Members registered address)
- » 84% of Corporate attendees from the ACT (sourced from Brumbies)
- » In scope is defined as those whose main driver for visiting or extending their visit to Canberra / ACT was attending a Brumbies Match derived from Nielsen Sports Economic Impact & Attendee Research Online Survey (n=981) and Intercept Survey (n=488)
- » Total in Scope Visitors does not include persons that accompanied survey participants on their trip to Canberra

ATTENDEE TYPE	TOTAL ATTENDEES	% IN SCOPE	# IN SCOPE
ACT Ticket Sales	1,021	0.0%	0
ACT Members	805	0.0%	0
ACT Corporates	151	0.0%	0
Interstate/Overseas Ticket Sales	706	96.7%	682
Interstate Members	80	96.7%	77
Interstate Corporates	29	100.0%	29
Total	2,791		788

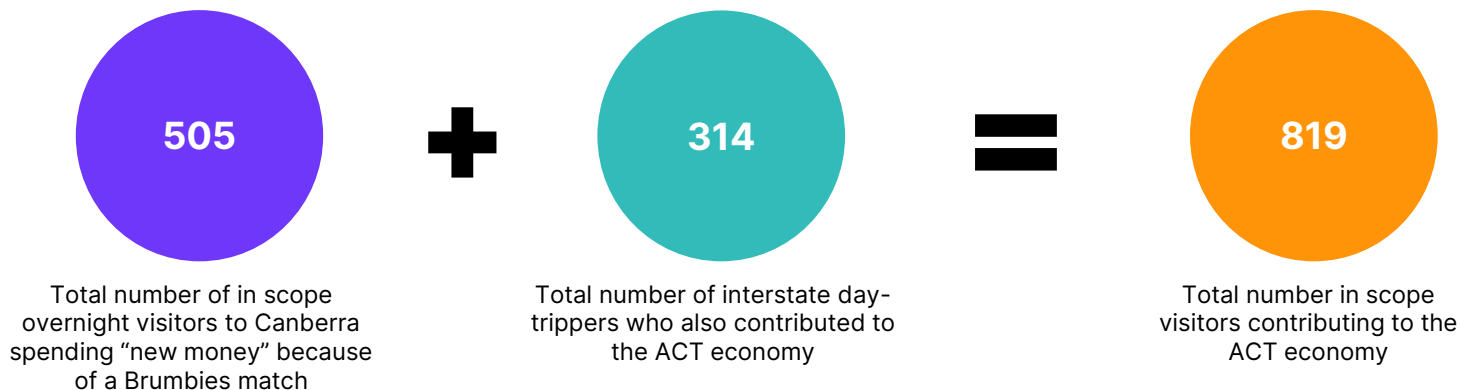
^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included. *Entourage not included in this metric.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

819 visitors to Canberra

An additional 31 people travelled to Canberra as a result of their travel party's intentions to attend a Brumbies match

ATTENDEE TYPE	TOTAL IN SCOPE ATTENDEES	IN SCOPE VISITOR TYPE	% VISITOR TYPE	# VISITOR TYPE	ACCOMPANYING PERSONS	TOTAL IN SCOPE VISITORS
Interstate/Overseas	788	Overnight	62%	489	16	505
		Daytrippers	38%	299	15	314
Total	788			788	31	819



[^] In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

\$238k spent in Canberra by visitors

Interstate overnight visitors stayed on average 2.50 nights and spent on average \$174 per day

ATTENDEE TYPE	TOTAL IN SCOPE VISITORS	AVERAGE LENGTH OF STAY	BED NIGHTS	AVERAGE DAILY SPEND	IN-SCOPE VISITOR SPEND
Interstate/Overseas Overnighters	505	2.50	1,264	\$173.67	\$219,465
Interstate Daytrippers	314	0.00	0	\$59.50	\$18,676
Total	819	2.50	1,264	\$129.93	\$238,141



Total direct expenditure derived from 505 overnight in scope visitors



Total direct expenditure derived from 314 in scope day visitors



Total direct expenditure

^ In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.
Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

Strong length of stay for women's

OUTPUT	2023 (Women's)	2023 (Men's)
Total attendance	2,791	53,076
Outside of ACT attendance	814	11,779
In Scope Visitors	819	11,604
Overnight Split	62%	68%
Avg. Length of Stay	2.50	2.47
Bed nights	1,264	19,546
Avg. Daily Spend	\$129.93	\$145.72
In-Scope visitor spend	\$238,141	\$3,751,926

ANALYSIS:

- Key metrics for the women's Brumbies fixtures were in line with men's data, with average length of stay 2.50 nights
- Average Daily Spend was slightly lower than the men's (-11%), whilst overnight split was 6 percentage points lower

[^] In-Scope Attendees are defined as attendees whose main reason for visiting the region / host city was to attend the event. Those who extended their stay to attend the event are also included.
Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n = 488.

Executive Summary

Partner Recall

Economic Impact – Men's

Economic Impact – Women's

Community Sentiment

ACT Sport & Recreation

Appendix

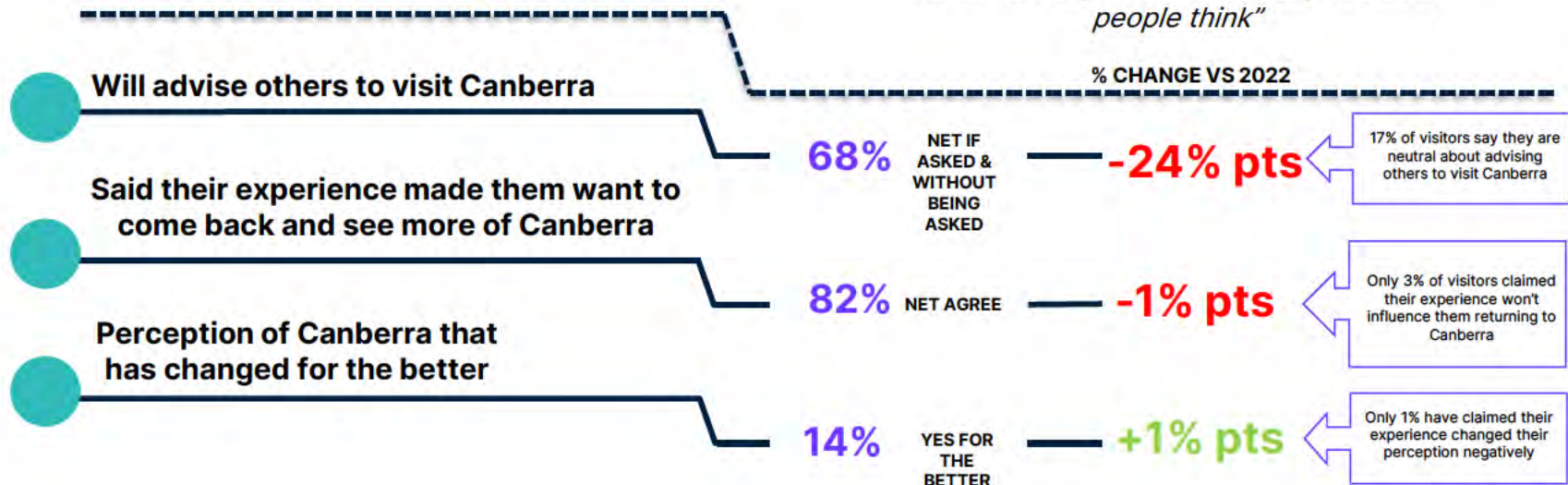
Perception of Canberra is consistent

There has been an increase in visitor's perceptions of Canberra; with 14% saying their perception of Canberra has changed for the better, +1 %pt more than last year

PERCEPTIONS OF CANBERRA AMONGST INTERSTATE/OVERSEAS VISITORS

"It's a much more happening city these days"

"A vibrant city with more to explore than people think"



Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
Visitors = 292

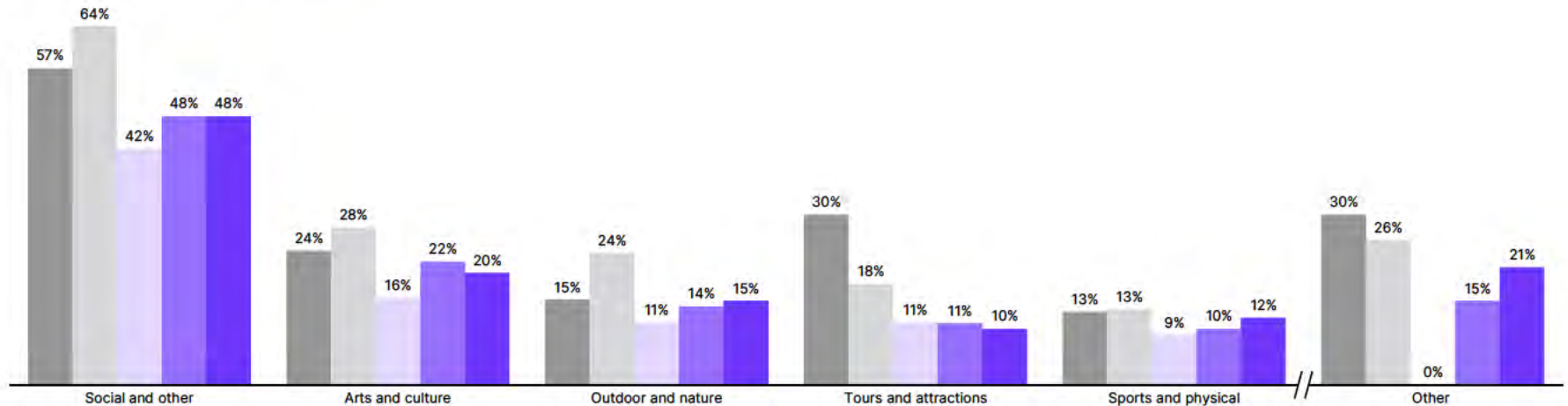
“Social and other” most popular activity

The percentage of people who are engaging social activities has remained stable year-on-year, with those participating in sports increasing by 2 % pts

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

% of Interstate Visitors

■ 2018 ■ 2019 ■ 2021 ■ 2022 ■ 2023



Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
Visitors = 292

Community Metrics remain stable

89%

(-1% pts v 2022)

It helps enhance community spirit, pride and enjoyment

87%

(Level v 2022)

It makes me proud to be from Canberra / ACT

60%

(-3% pts v 2022)

Having it in Canberra creates a real buzz in the city

88%

(-1% pts v 2022)

It helps make Canberra / ACT a more enjoyable place to live

73%

(-4% pts v 2022)

It is well-liked and positively embraced by the people of Canberra / ACT

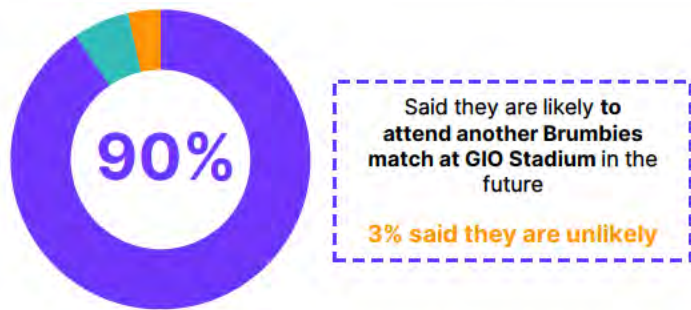


87% agreed that Brumbies players are positive role models in the community

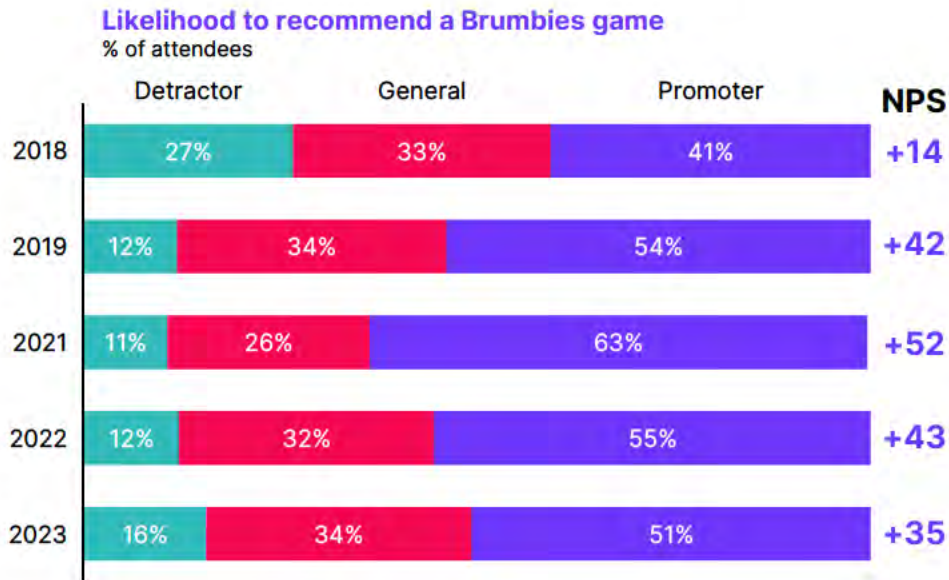
Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
ACT Residents = 689

NPS remains higher than 2018

The Net Promoter Score of Brumbies games among 2023 attendees is 35; higher than that of 2018



LIKELY   3% pts on 2022
 NEUTRAL   3% pts on 2022
 UNLIKELY   1% pts on 2022



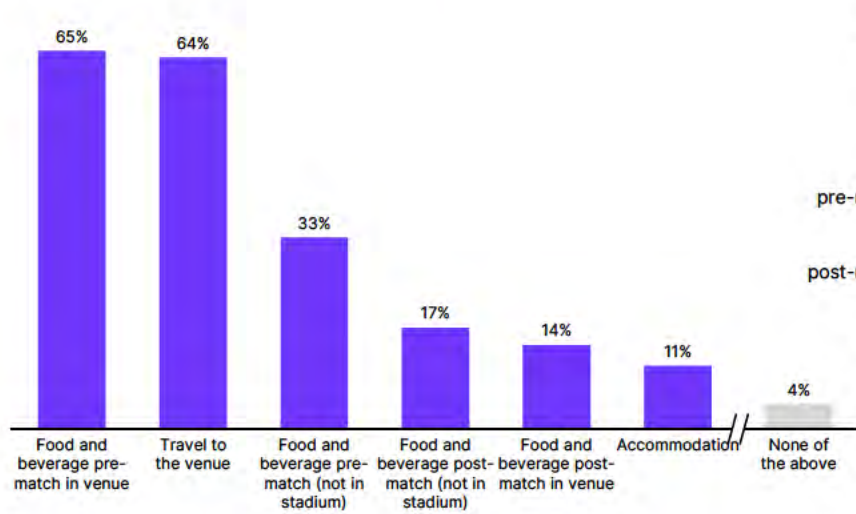
100%

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey; n = 981

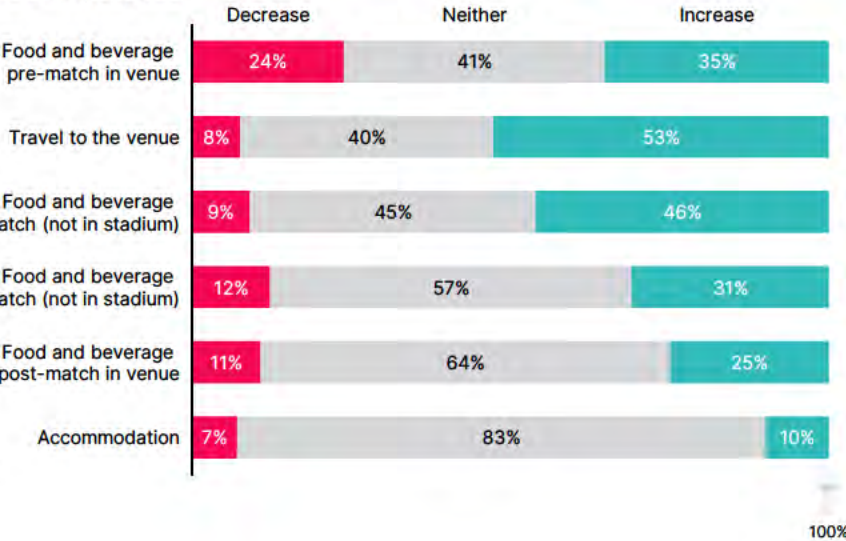
High discretionary spend on food

65% of respondents spent discretionary income on food/beverages before the match at another venue, with 46% stating their spend would increase if the stadium was in the CBD

What event related goods/services do you spend your discretionary income on during your game day experience?
% of respondents



Would your spend on these goods/services increase or decrease if the stadium was in a CBD location?
% of respondents



Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981

Executive Summary

Partner Recall

Economic Impact – Men's

Economic Impact – Women's

Community Sentiment

ACT Sport & Recreation

Appendix

ACT Sport & Recreation Key Metrics - M

136

 	Total
Survey Sample Size	1,270
Economic Impact (Visitor Expenditure)	\$3,751,926
Economic Activity (Local)	\$4,619,047
Visitation	11,604
Ticketed Attendance	53,076
Bed Nights	19,546
Ave. Visitor Length of Stay	2.47
Ave. Visitor Daily Spend	\$145.72
Ave. Local Spend per Person	\$111.19
Likelihood of Return Visit	82%
Net Promoter Score	35
Enhances community spirit, pride, & enjoyment	89%
Event Satisfaction Rating	NA
Overall Marketing Score	NA

In-Scope Visitors			Locals
Total In-scope	Interstate/Over seas - Overnight	Interstate/over seas- Daytrip	
143	228	111	908
\$3,751,926	\$3,467,523	\$284,403	
			\$4,619,047
11,604	7,928	3,676	
	11,604		41,297
19,546	19,546		
	2.47	0	
	\$177.40	\$77.37	

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n =488.

ACT Sport & Recreation Key Metrics - W ¹³⁷

 	Total
Survey Sample Size	154
Economic Impact (Visitor Expenditure)	\$238,141
Economic Activity (Local)	\$219,782
Visitation	819
Ticketed Attendance	2,791
Bed Nights	1,264
Ave. Visitor Length of Stay	2.50
Ave. Visitor Daily Spend	\$129.92
Ave. Local Spend per Person	\$111.19
Likelihood of Return Visit	82%
Net Promoter Score	35
Enhances community spirit, pride, & enjoyment	89%
Event Satisfaction Rating	NA
Overall Marketing Score	NA

In-Scope Visitors			Locals
Total In-scope	Interstate/Over seas - Overnight	Interstate/over seas- Daytrip	
59	37	22	92
\$238,141	\$219,465	\$18,676	
			\$219,782
819	505	314	
	819		1,976
1,264	1,264		
	2.50	0	
	\$173.67	\$59.50	

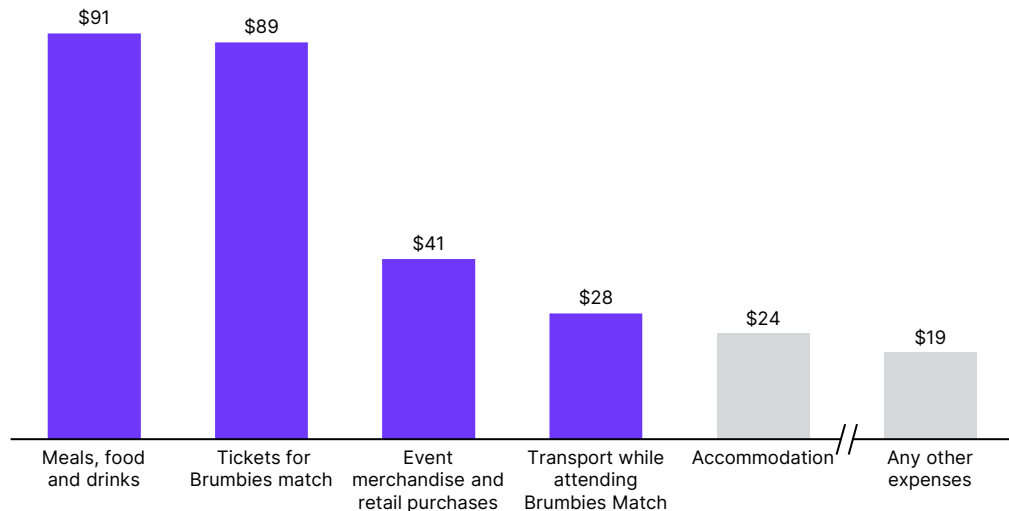
Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981. ACT Brumbies Intercept Survey: n =488.

Local Average Spend \$111 per person

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

Average Local Group Expenditure as a Result of 2023 ACT Men's Brumbies Home Games

\$ | ACT Residents



Local Residents

\$111

Per person expenditure

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

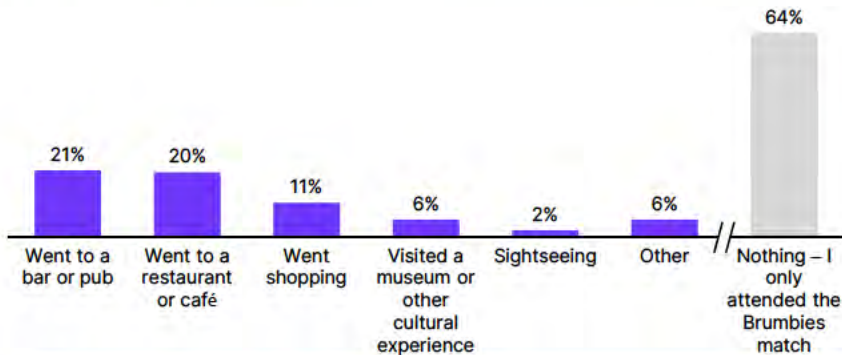
This is calculated based on an average group size of 2.6 people and group expenditure of \$293.

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
ACT Residents = 689

Local Perception of Brumbies Match in ACT¹³⁹

Leisure Activities whilst in ACT for Brumbies Home Games

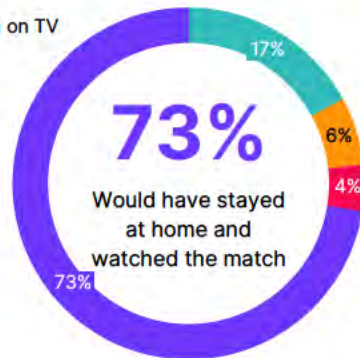
% ACT Residents



What local residents would have done instead of attending

% ACT Residents

- Stayed at home and watched the match on TV
- Stayed at home
- Something else in Canberra
- Something else outside of Canberra



99%



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

88%



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

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
ACT Residents = 689

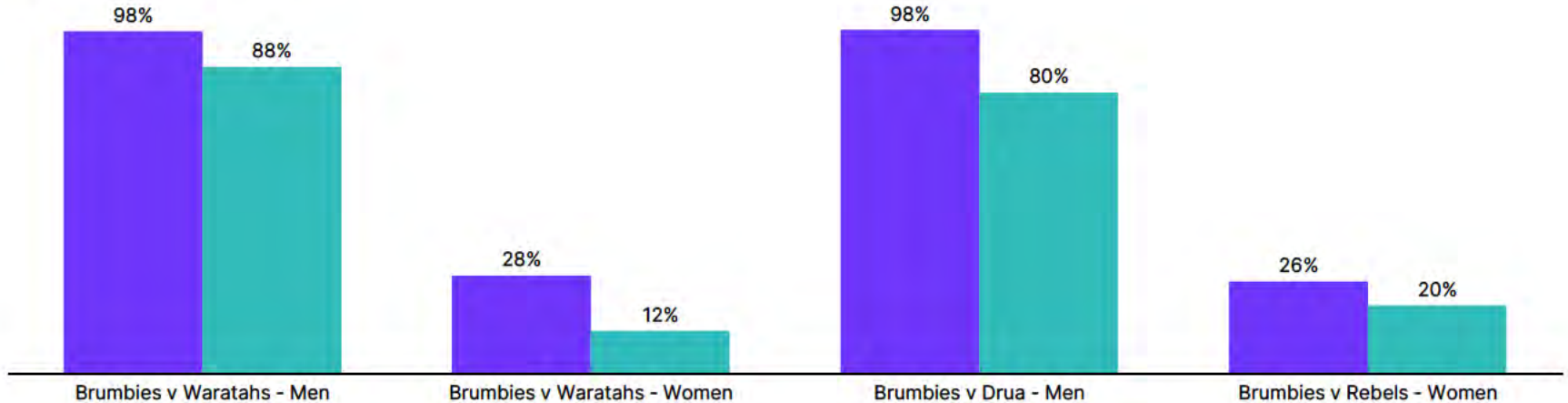
Most attending for men's match

For the first double header, 88% of respondents indicated that the men's match against the Waratahs was the primary reason for attending, with 80% stating this for the second fixture

Match watched and Match primary reason for attendance

% of respondents

■ Watched ■ Main Reason



Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981

Brumbies Players are Positive Role Models¹⁴¹

Do you see the ACT Brumbies players as positive role models in the community?

87%
Yes



Why do you see the ACT Brumbies players as positive role models in the community?

"Hard-working, successful local players encourage young people to remain active and healthy."

"They're proud, They're always out in the community, you've never heard them do something bad in the news."

"They are always lovely and genuine when you meet them, I love the community outreach they do and how much they pride themselves in living in Canberra."

"The players visit local clubs and work hard in the community. You never hear bad things in the media about Brumbies players in the community, but rather the opposite."

"They promote physical activity; positive values for men and women; sportsmanship; and teamwork to school children and across the community."

Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981
ACT Residents = 689

Executive Summary

Partner Recall

Economic Impact – Men's

Economic Impact – Women's

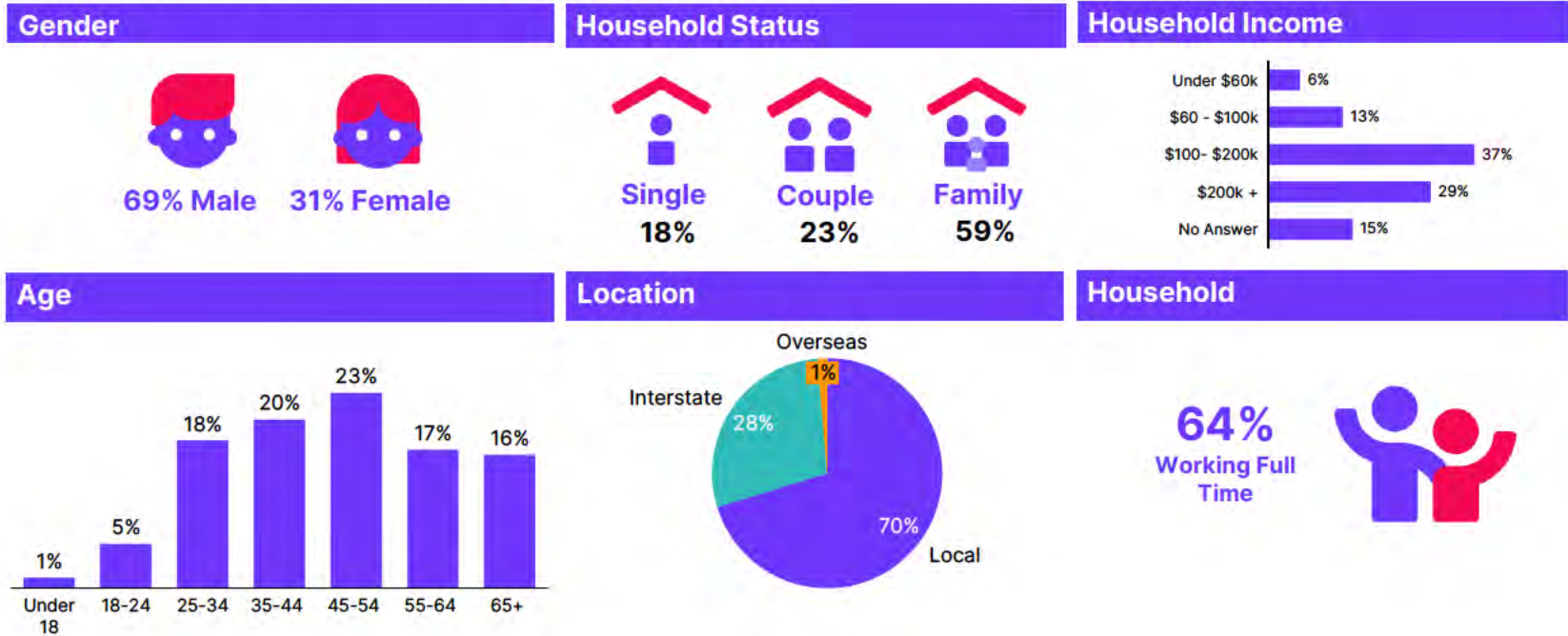
Community Sentiment

ACT Sport & Recreation

Appendix

Brumbies Attendee Profile

Brumbies attendees are more likely to be male, aged between 45-54 and working full time; with a household income between \$100k - \$200k



Source: ACT Brumbies Economic Impact & Attendee Research Online Survey: n = 981

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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

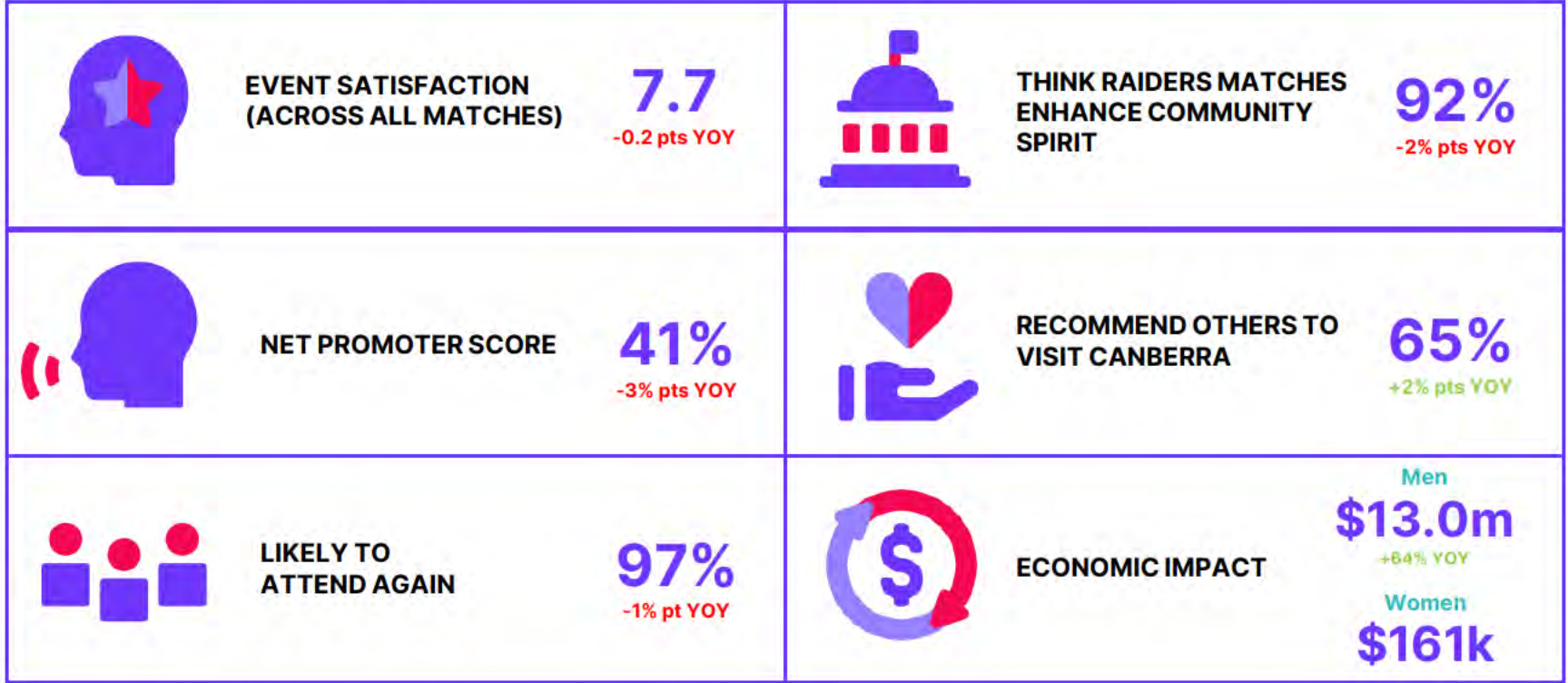
Tourism & Community Impact

Sponsor Recall

ACT Sport & Recreation

Appendix

Key Findings



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

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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

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

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.

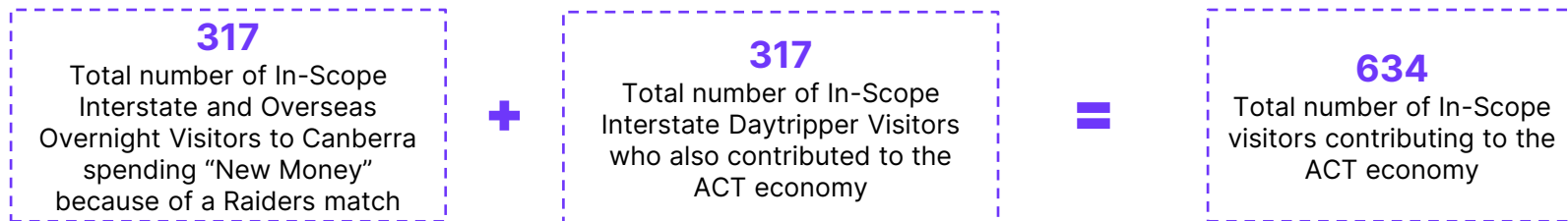
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634 In-Scope Visitors to Canberra

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



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

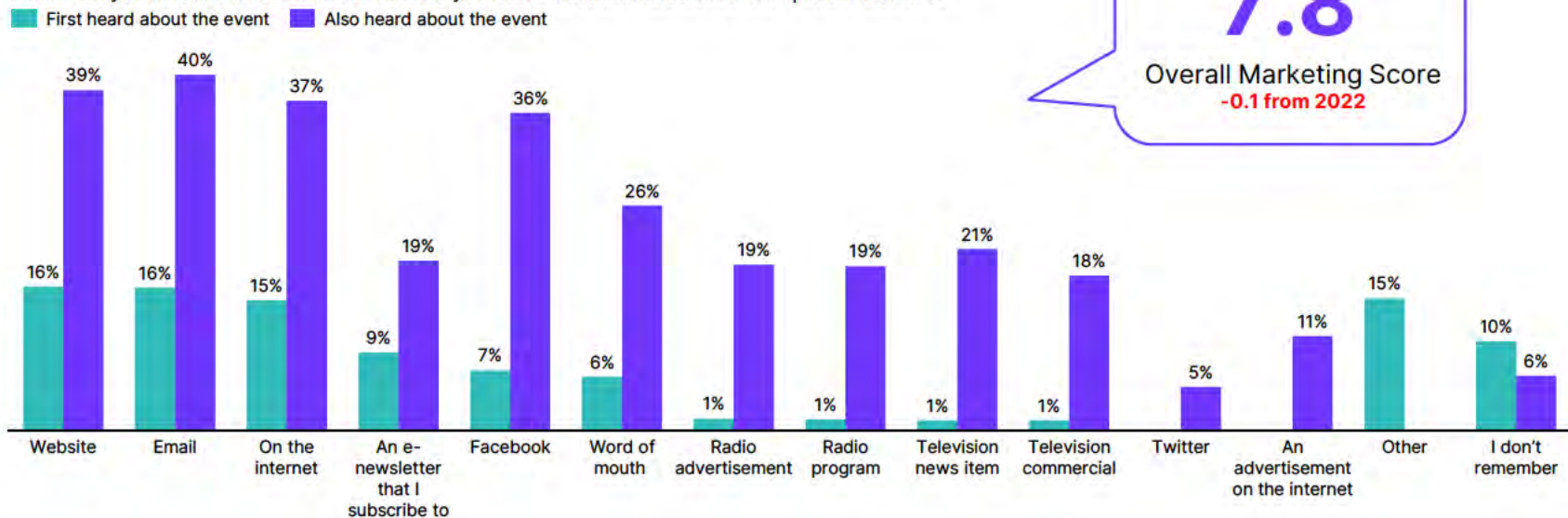
Appendix

Website & Email key drivers of awareness ¹⁵⁷

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?"

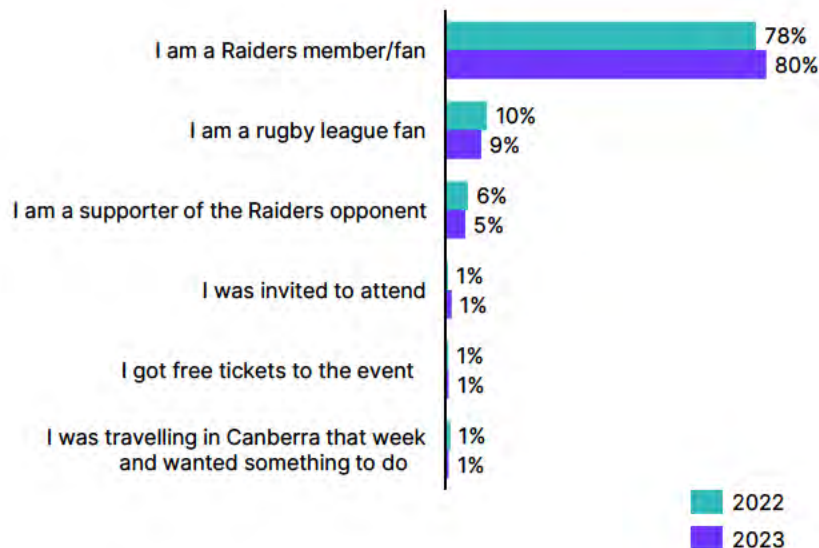
Source	First Found Out							Also heard about							Total						
	2017	2018	2019	2020	2021	2022	2023	2017	2018	2019	2020	2021	2022	2023	2017	2018	2019	2020	2021	2022	2023
Email	14%	20%	22%	30%	22%	18%	16%	35%	34%	30%	47%	28%	36%	40%	49%	54%	52%	77%	50%	56%	57%
Website	17%	19%	18%	14%	18%	15%	16%	36%	39%	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 ¹⁵⁹

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%

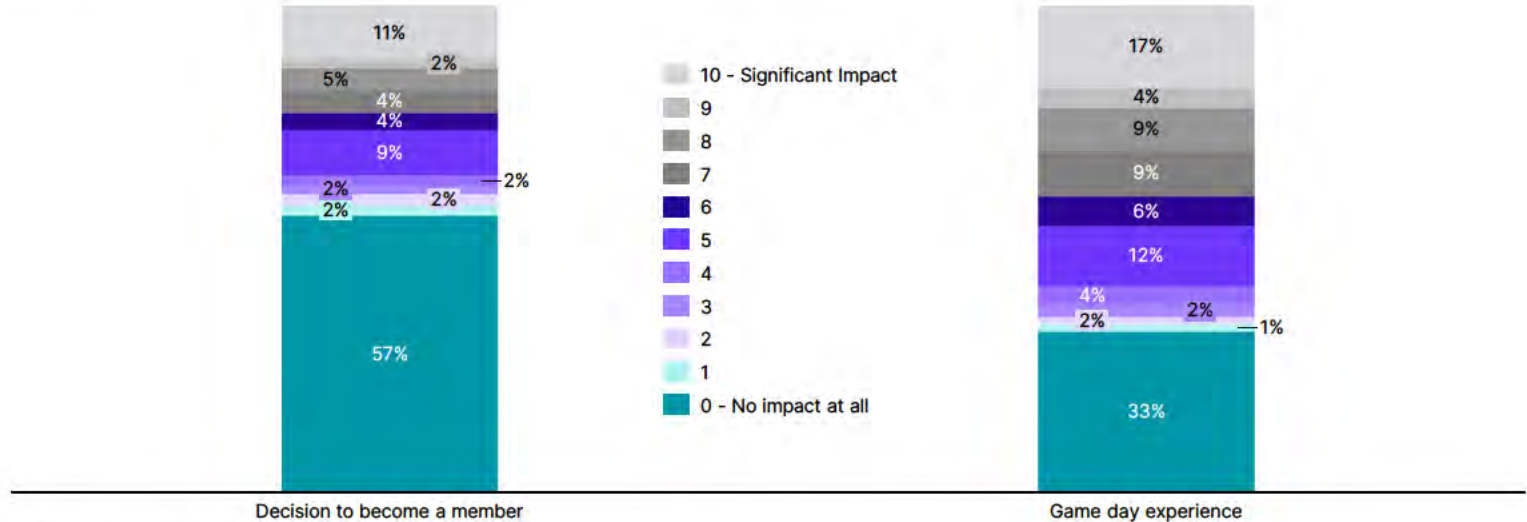
Friends

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.

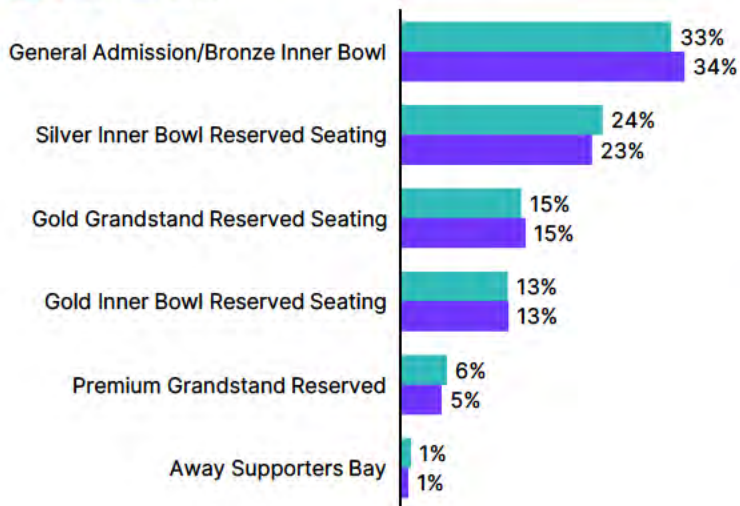
General Admission tickets most popular

161

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%

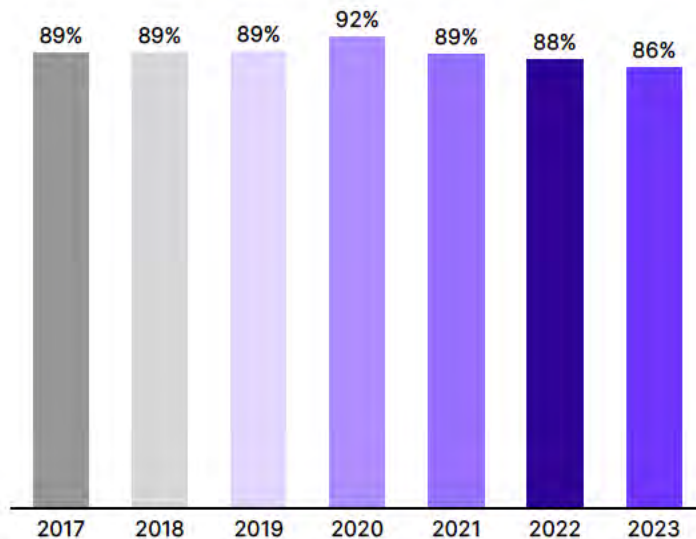
83%

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)

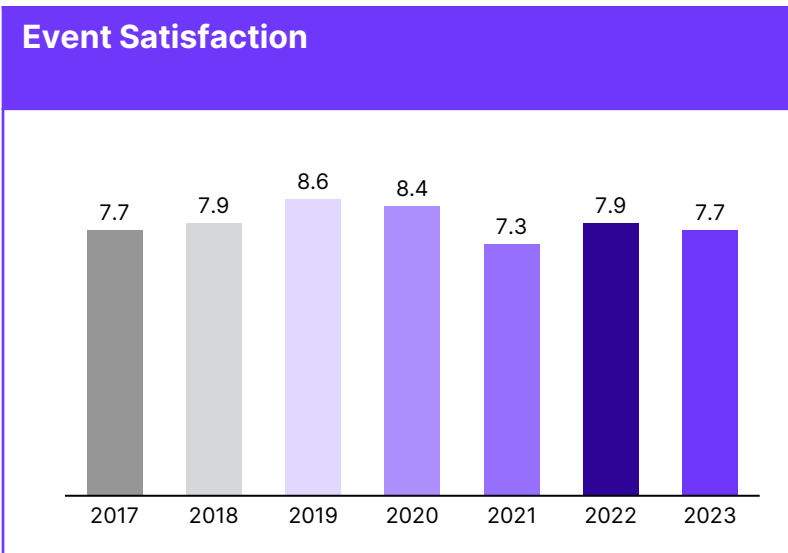
97% of attendees likely to attend again

163

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%

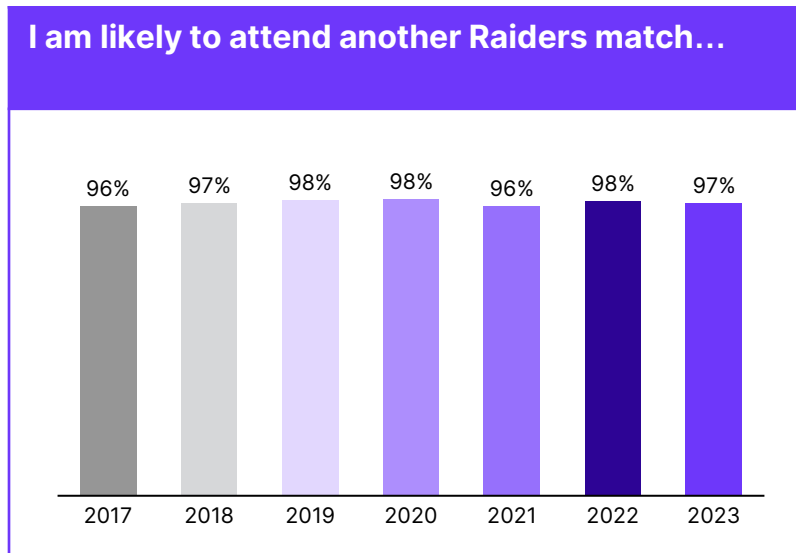
Please describe your overall level of satisfaction and enjoyment from attending your most recent Raiders match at GIO Stadium Canberra?

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

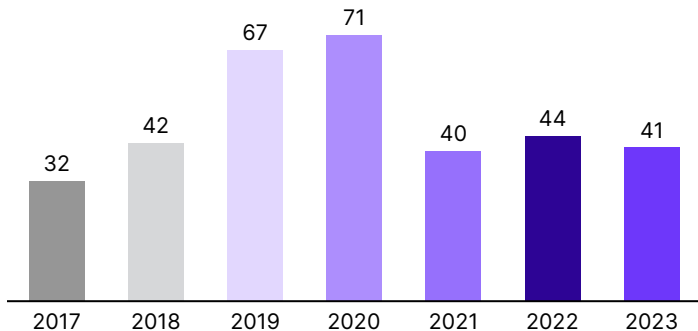
164

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

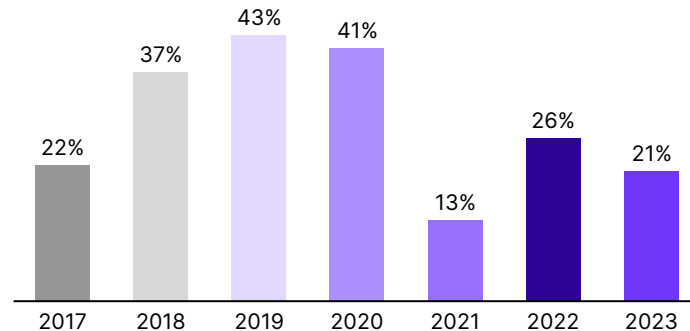
Net Promoter Score



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

% of In-Scope respondents

The event was better than expected...



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
98% +1 pt YOY	99%	98%	99%	99%	99%	99%
99% -1 pt YOY	99%	98%	99%	99%	98%	98%
91% +3 pt YOY	91%	91%	94%	93%	94%	95%
94% -1 pt YOY	93%	94%	79%	77%	81%	-
84% -2 pts YOY	86%	86%	85%	93%	92%	91%
77% +1 pt YOY	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

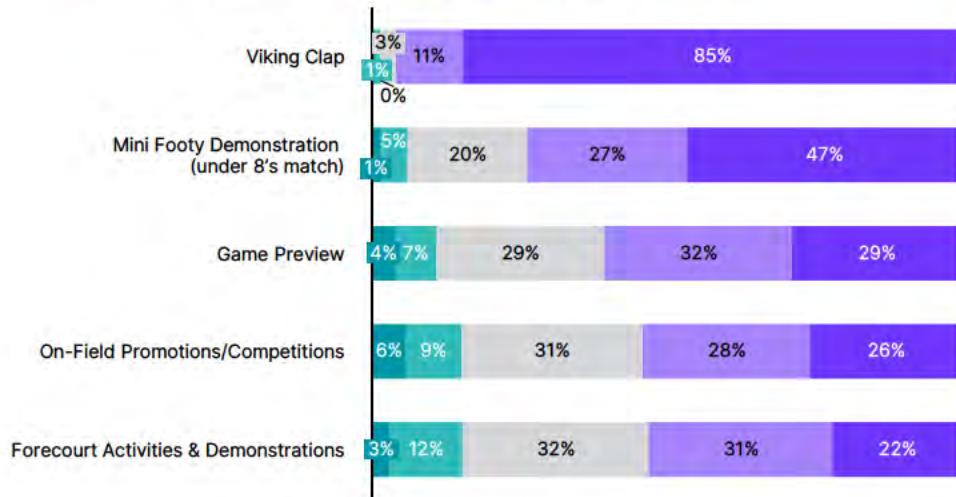
Source: Canberra Raiders Attendance Survey: n = 967.

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



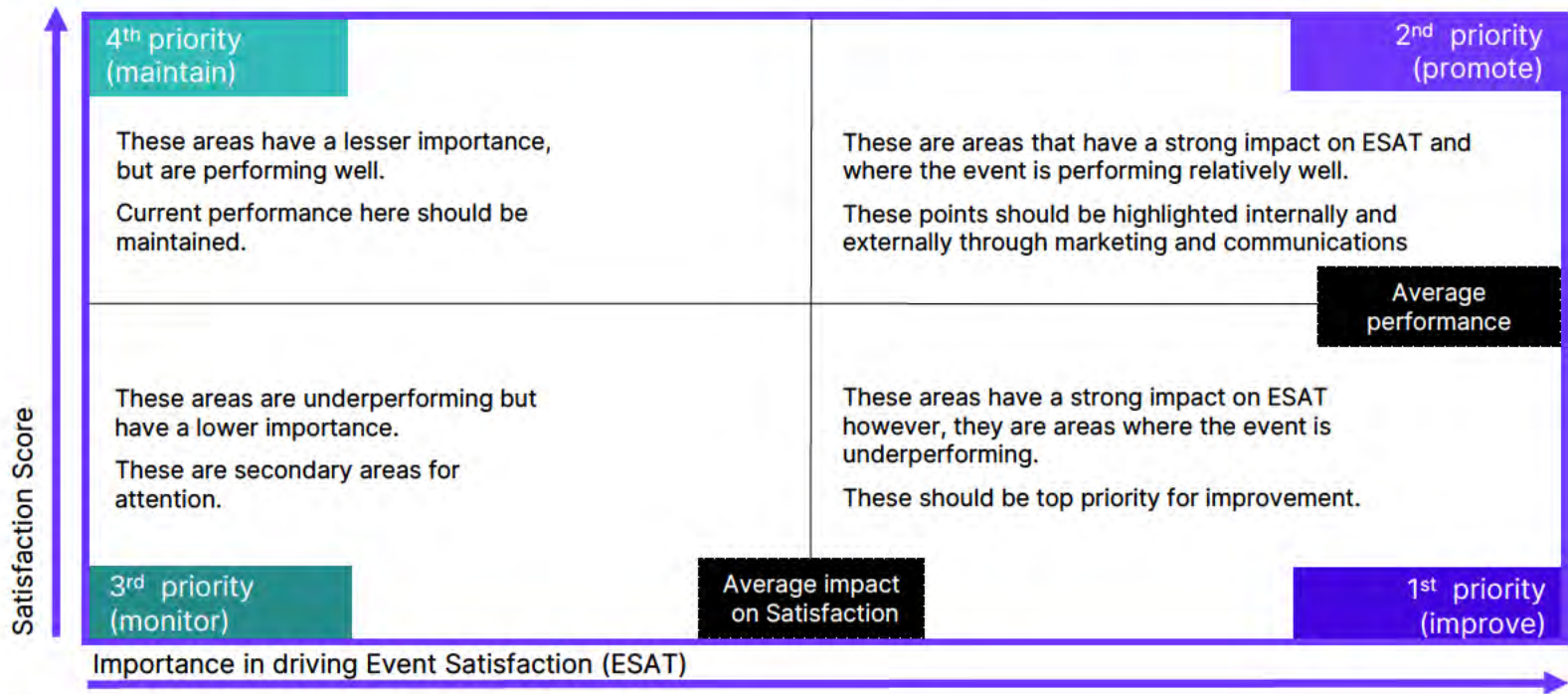
In regards to Game Day Entertainment, what can the Raiders do to make the sporting experience more enjoyable?:

- » "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

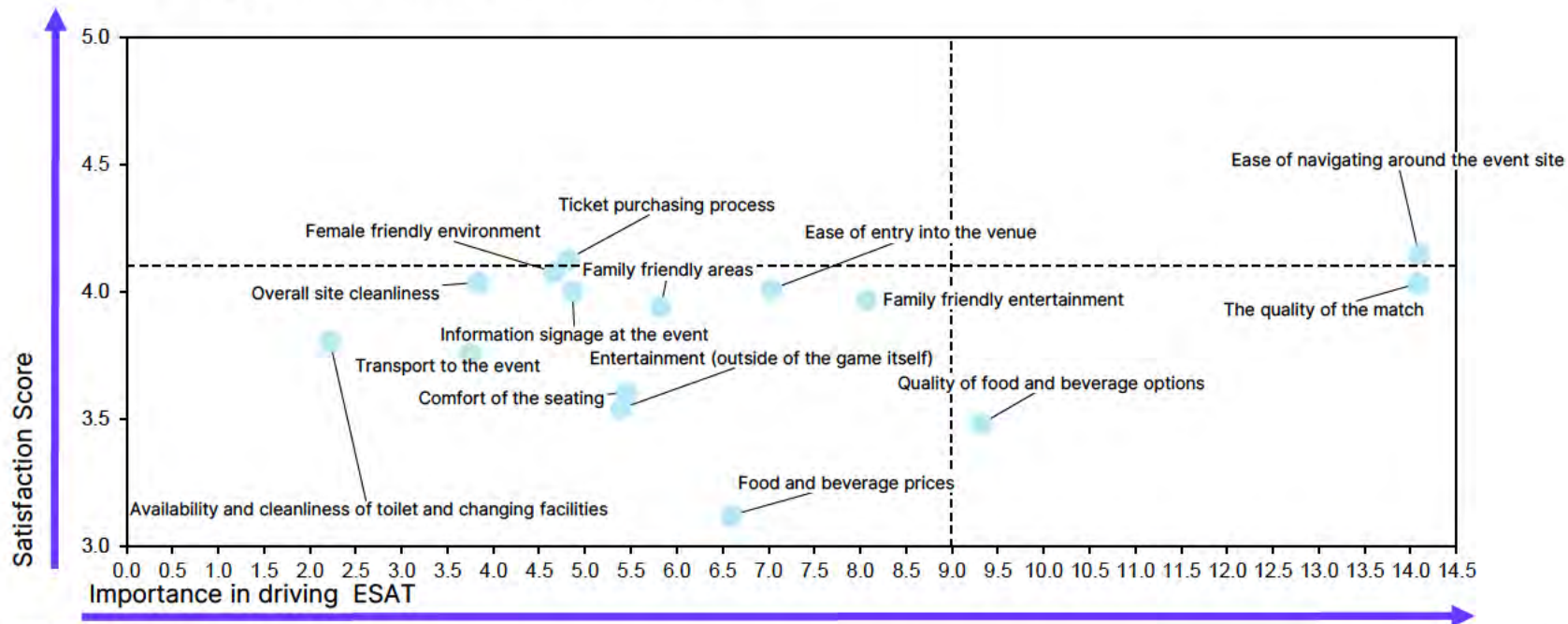
*Excludes those who did not experience element.

Source: Canberra Raiders Attendance Survey: n = 967.

Canberra Raiders: Nielsen Impact Matrix

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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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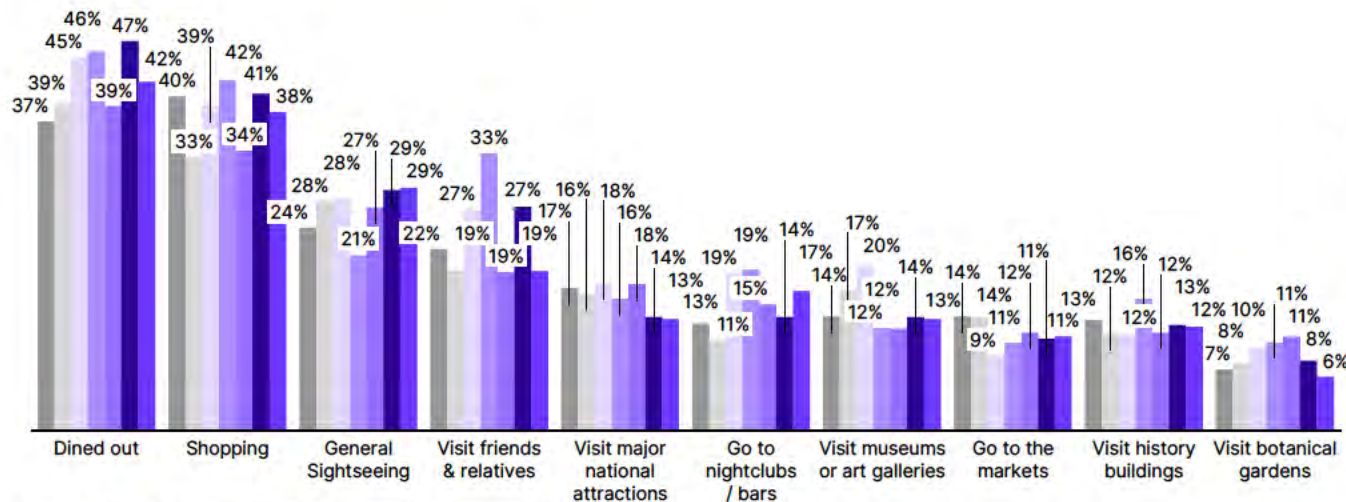
Dining and Shopping remain most popular

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

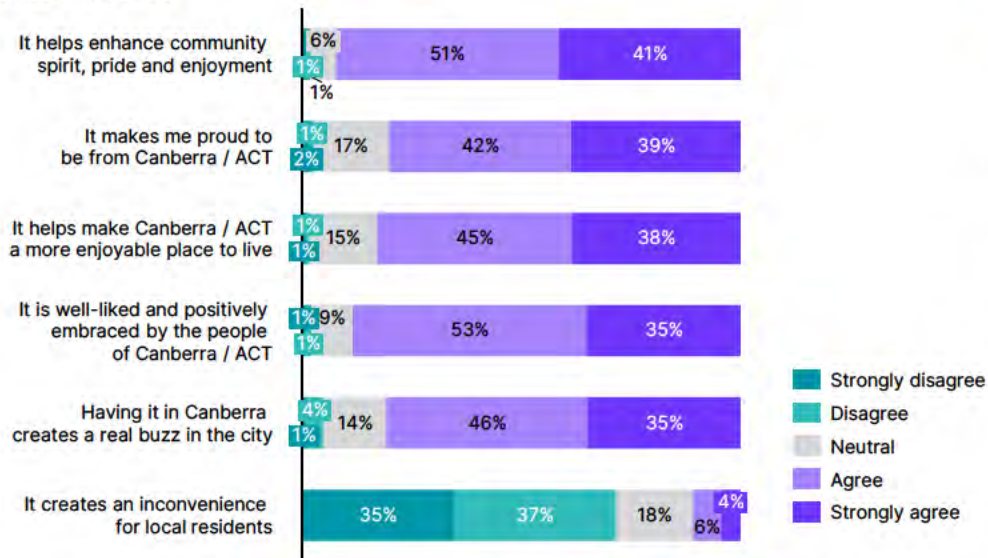
Source: Canberra Raiders Attendance Survey; n = 967. Visitors to Canberra = 329.

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



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

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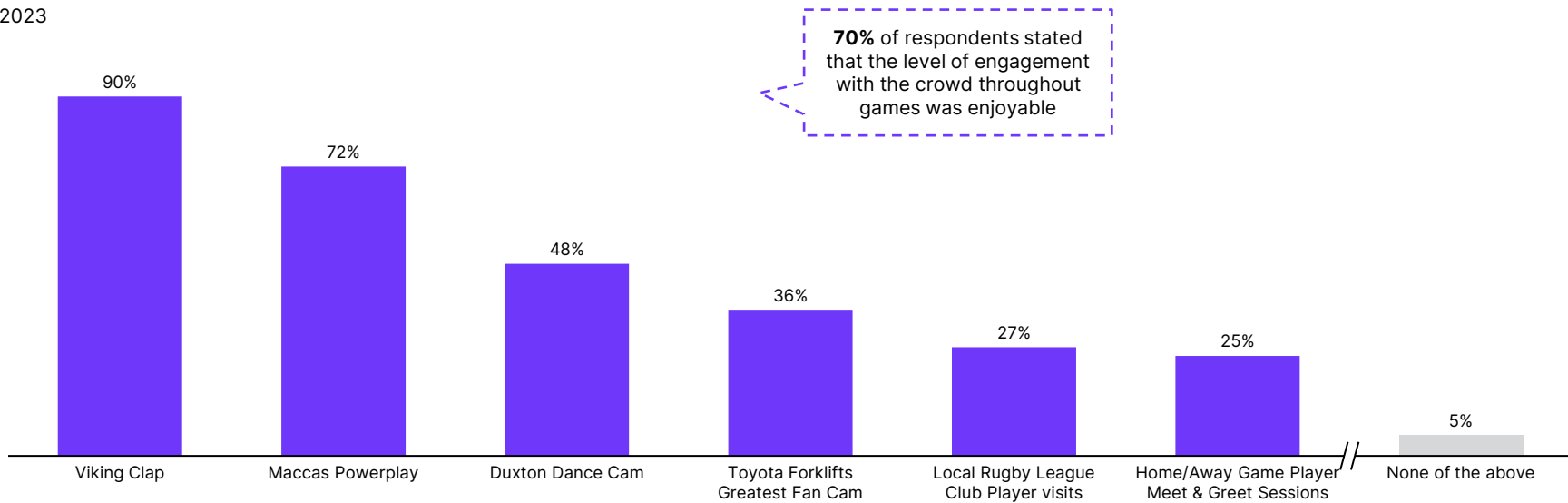
Sch 2.2(a)(xi)

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.

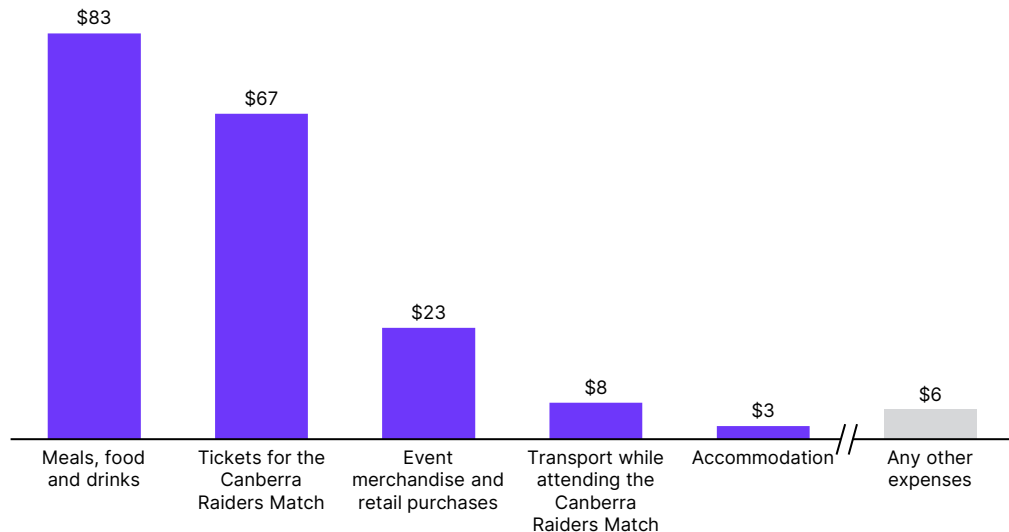
Source: Canberra Raiders ticketing information | Source: Canberra Raiders Attendance Survey: n = 967. Local Residents = 81. Visitors to Canberra = 23. Note: community metrics based on all matches (men's & women's).

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

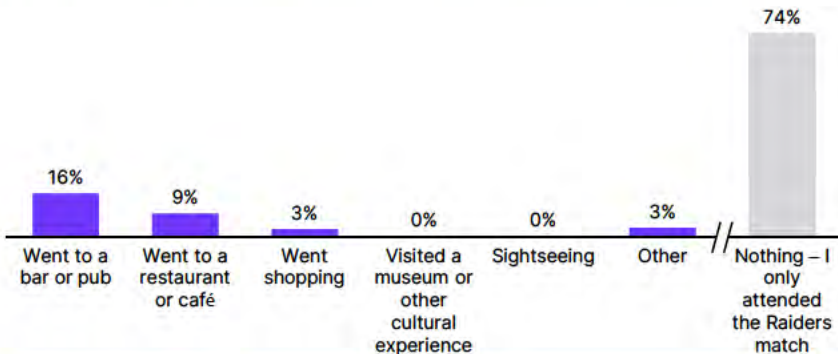
Per person
expenditure

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

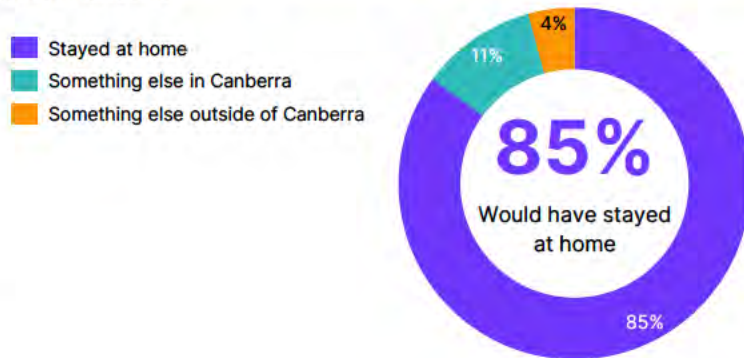
This is calculated based on an average group size of 2.7 people and group expenditure of \$189.

Local Perception of Raiders Match in ACT¹⁸²

Leisure Activities whilst in ACT for Raiders Home Games % ACT Residents



What local residents would have done instead of attending % ACT Residents



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.

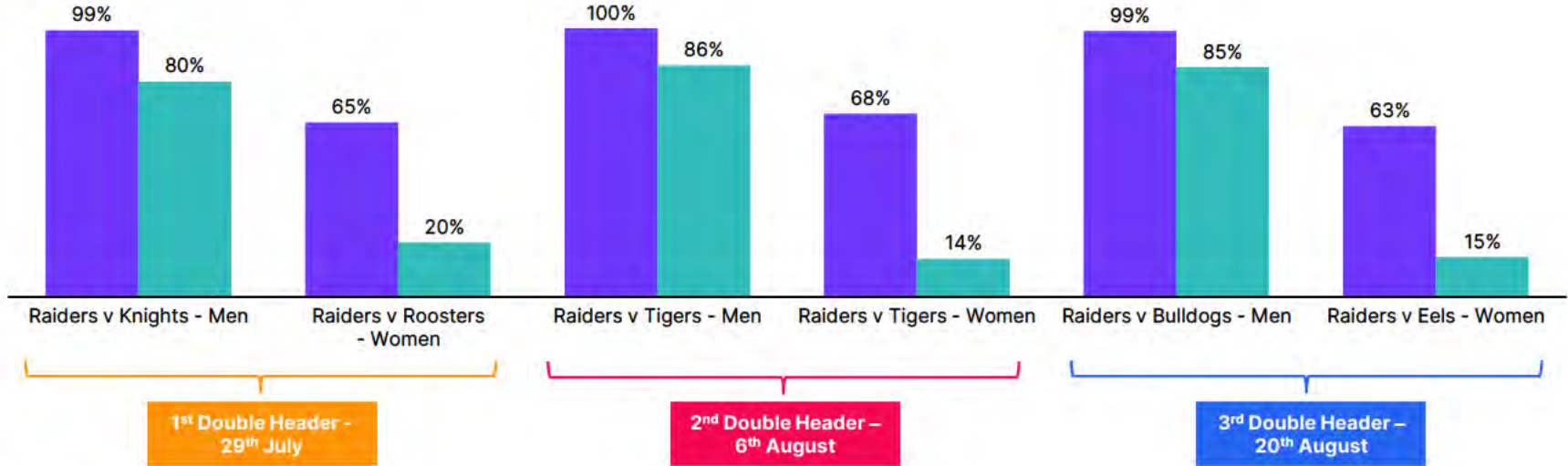
Most attending for men's match

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

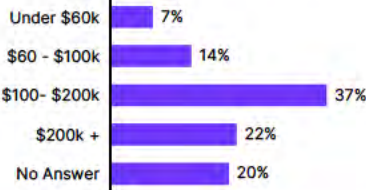
Gender



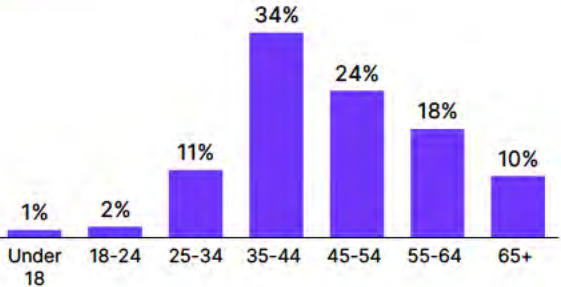
Household Status



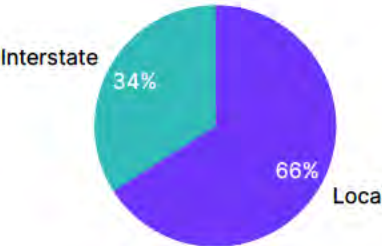
Household Income



Age



Location



Employment Status

66%
Working Full
Time



Source: Canberra Raiders Attendance Survey: n = 967.

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**GWS Giants Economic Impact &
Attendee Research Report**

September 2023

Project Overview

Nielsen Sports was commissioned by the GWS Giants to conduct a study of the economic & community impact of matches played in Canberra for the 2023 season.

The report includes:

- Gross economic impact to the Canberra region from the staging of 2023 GWS Giants home matches played in Canberra. Gross Economic Impact includes direct expenditure only.
- The community impact of Giants 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 Giants sponsors.

Nielsen Sports was responsible for the questionnaire design, survey scripting and hosting online, data analysis and reporting. GWS Giants were responsible for distributing an email invitation to complete the survey to their attendee database. To complement the online survey, an intercept survey was conducted at one match to help drive increases in in-scope sample size.

Survey Type	Completes
Online Survey	339
Intercept Survey	307



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ACT Sport & Recreation

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Executive Summary: Key Metrics



Prompted Partner Recall

51%

Prompted Recall of
CBR Partnership

When asked to recall sponsors of the GWS Giants, 51% of respondents noted CBR, a 16% increase compared to last year.



Economic Impact Insights

\$1.7M

Injected into the Canberra economy by visitors

A total of 7,651 In-Scope visitors spent money within the Canberra/ACT area as a result of attending Giants fixtures, with an average of \$182 per day spent by overnight visitors. Direct expenditure per game is up 4% compared to 2022.



Community Sentiment Insights

89%

Said they'll advise others to come to Canberra

89% of attendees stated that they would advise others to come to Canberra. 9% of patrons stated that their visit changed their perception of Canberra for the better.

Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

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ACT Sport & Recreation

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Comparison of key metrics versus 2022

Economic Impact Key Figures

Input	2023	2022	2021	2019	2018
Satisfaction	7.9	7.5	7.9	7.4	7.5
Match Attendance	30,526	39,209	19,627	39,749	41,701
In-scope Visitation (Incl. Day Trippers & Entourage)	7,651	9,153	6,547	12,088	8,364
Bed Nights	8,945	12,927	9,306	13,274	12,188
Direct Visitor Expenditure	\$1,695,033	\$2,165,319	\$1,474,068	\$2,423,381	\$2,132,569

Insights:

- 2023 GWS Giants fixtures generated a direct visitor expenditure of \$1.7 million, 22% less than last year (+4% per match). This was driven by a decline in attendance as a result of one less Canberra fixture.
- Average length of stay has also decreased year-on-year, indicating that visitors are opting to stay for a shorter amount of time.
- Positively, average daily spend for both overnights and daytrippers has increased (+10% and +14% respectively)
- Whilst total direct visitor expenditure has decreased as a result of one less fixture, average direct expenditure has increased by 4% (\$541k in 2022 v \$565k in 2023)



+4%

**Average Match Attendance
Per Match**



+11%

**Average In Scope Visitors to
the ACT Per Match**



-8%

**Visitor Nights in the ACT
Per Match**



+4%

**Direct Visitor Expenditure Per
Match**

Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

Economic Impact Figures by Match

Total visitor expenditure for the 2023 season was \$1.7 million, with the match against the Brisbane Lions driving total economic impact; accounting for 40% of direct expenditure

Economic Impact Key Figures by Match

Match	Visitor Type	# Of Visitors	Entourage	Total Visitors	Length of Stay	Bed Nights	Average Daily Spend	Total Visitor Expenditure
Brisbane	Day Tripper	843	0	843	NA		\$51.54	\$43,437
	Overnight	2,472	11	2,483	1.51	3,755	\$170.07	\$638,661
Bulldogs	Day Tripper	426	0	426	NA		\$45.00	\$19,186
	Overnight	1,905	6	1,911	1.49	2,840	\$174.77	\$496,330
Suns	Day Tripper	455	0	455	NA		\$50.62	\$23,051
	Overnight	1,514	19	1,533	1.53	2,350	\$201.86	\$474,368
Total		7,616	36	7,651	1.17	8,945		\$1,695,033

Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

Comparison of key metrics versus 2022

Average Accommodation spend and overnight travel party size were greater across all three matches than in 2022 ,with length of stay down across the board

Economic Impact Key Figures by Match Year on Year

Average Nights	2018				2019				2021		2022				2023		
																	
Average Length Of Stay	1.67	1.56	2.05	2.18	1.50	1.54	1.47	1.56	1.63	1.65	1.78	1.71	1.89	1.83	1.51	1.49	1.53
Average Accom. Spend P/P/N	\$66.67	\$53.30	\$70.32	\$57.17	\$81.57	\$82.46	\$77.28	\$84.94	\$85.81	\$76.63	\$75.94	\$79.12	\$82.80	\$70.83	\$108.69	\$118.91	\$125.75
Overnight Travel Party	2.00	2.94	2.85	3.21	2.60	2.31	2.38	2.51	1.00	1.00	2.43	2.24	2.03	2.02	2.35	2.79	2.53

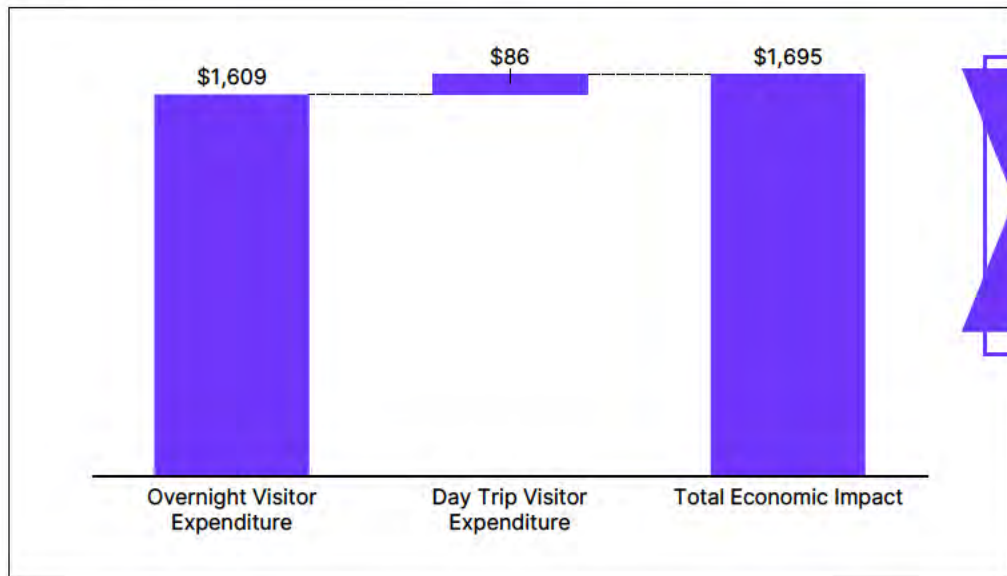
Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

Total Direct Economic Impact

A direct economic impact of \$1.7 million was recorded for the GWS Giants matches this year; a 4% uplift on a per match basis when compared to 2022

Total Economic Impact

\$000s



\$1,695,033
**TOTAL DIRECT ECONOMIC
IMPACT
(OVERALL ECONOMIC BENEFIT)**

Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

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Economic Impact

**Event Experience &
Satisfaction**

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ACT Sport & Recreation

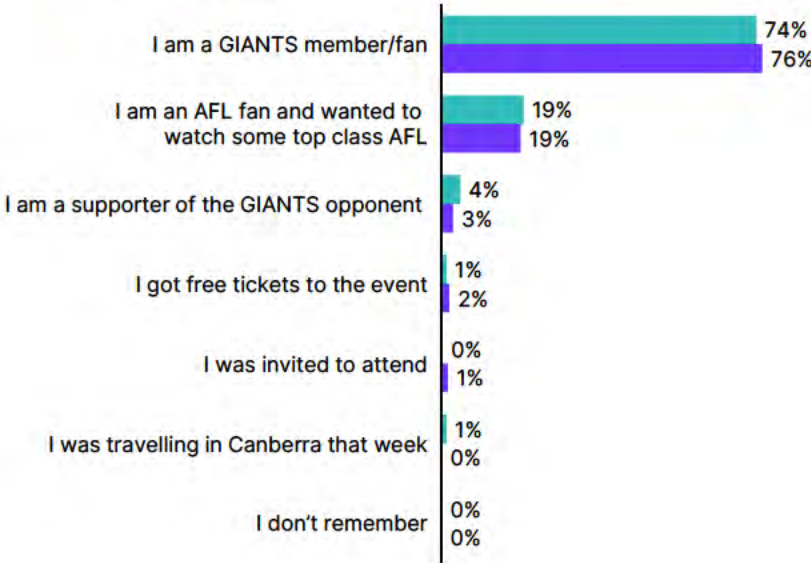
Appendix

Drivers of Attendance Summary

92% of attendees said they would likely attend another GWS Giants game in Canberra again, whilst 94% said they are likely to recommend a GWS Giants game to friends or colleagues

Drivers of Attendance

2022 2023



Source: GWS Giants 2023 Attendance Survey, n=339.

30%

Said it was better than expected

Up 11% pts v 2022

92%

Would definitely / probably attend again

Up 1% pt v 2022

94%

Are likely to recommend a GWS GIANTS game in Canberra

Score of >6, Up 8% pts v 2022

8.3

Average recommendation score

Up 0.1 from 2022

29%

Visited the Manuka Shops precinct pre or post game

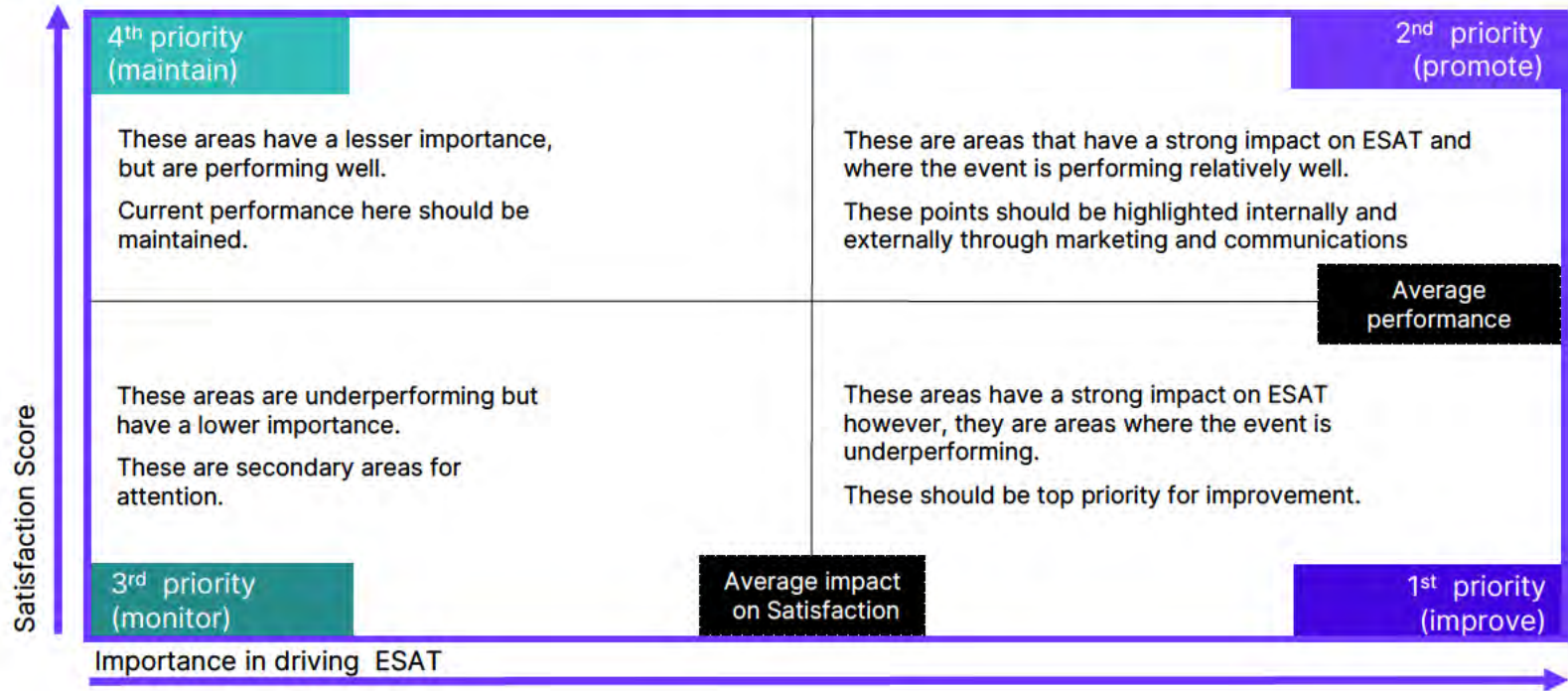
Down 7% pts from 2022

24%

Would be interested and consent to hearing about corporate offers

Nielsen Impact Matrix

The matrix allows the GWS Giants to prioritise which areas should be a focus in the future

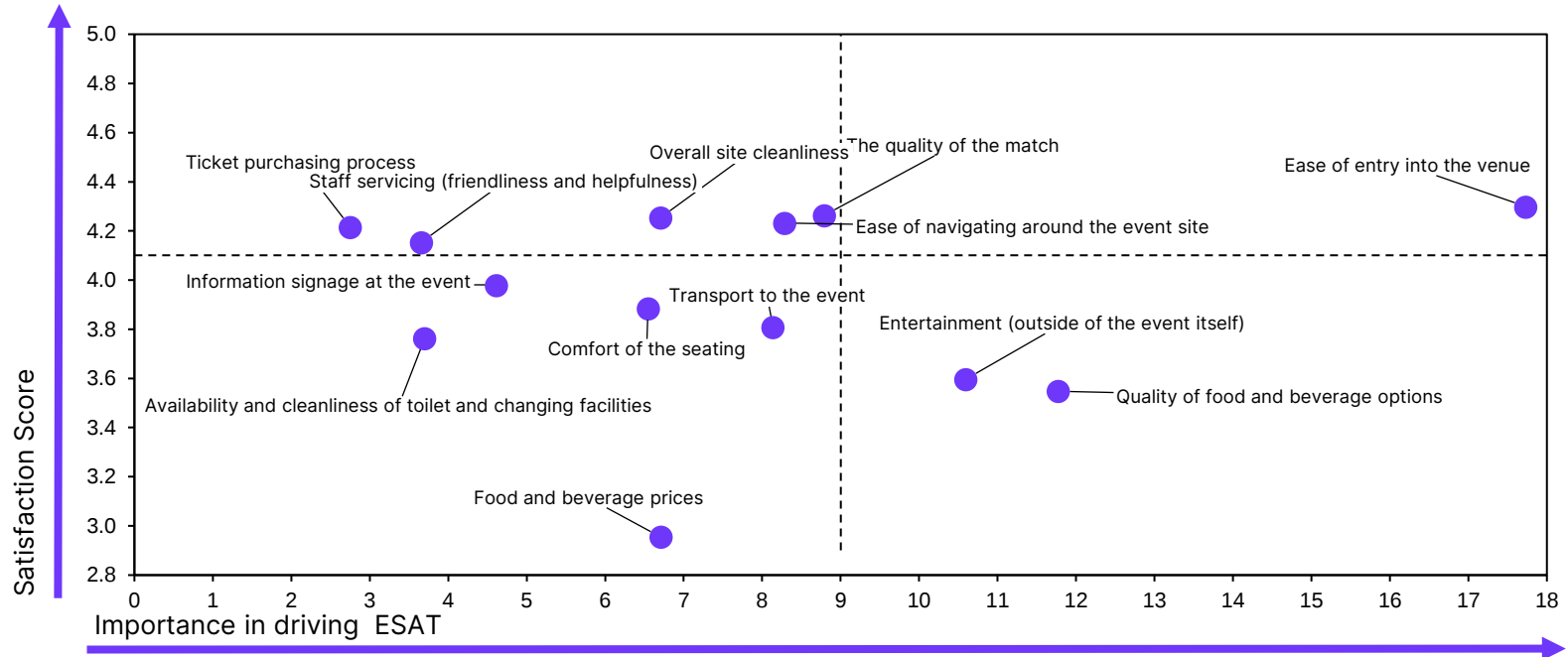


Source: GWS Giants 2023 Attendance Survey, n=339.

Nielsen Impact Matrix

201

When taking into account all event elements, the ease of entry into the venue is the biggest driver of event satisfaction

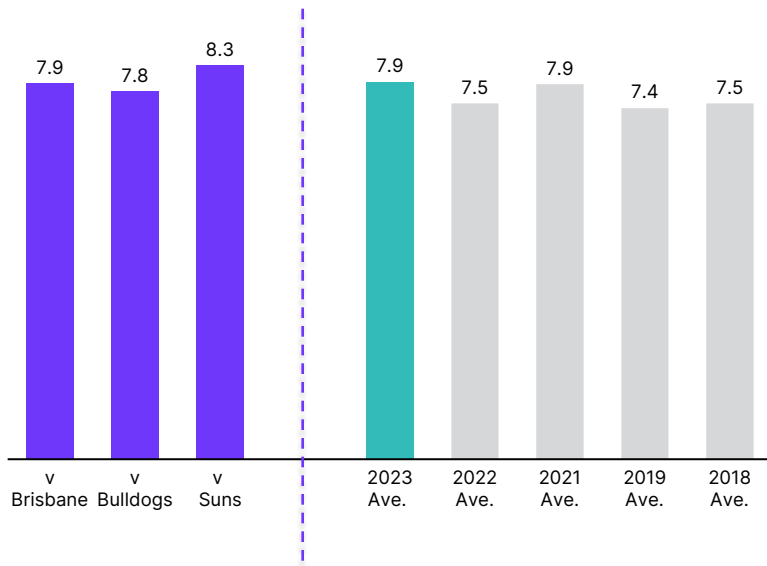


Source: GWS Giants 2023 Attendance Survey, n=339.

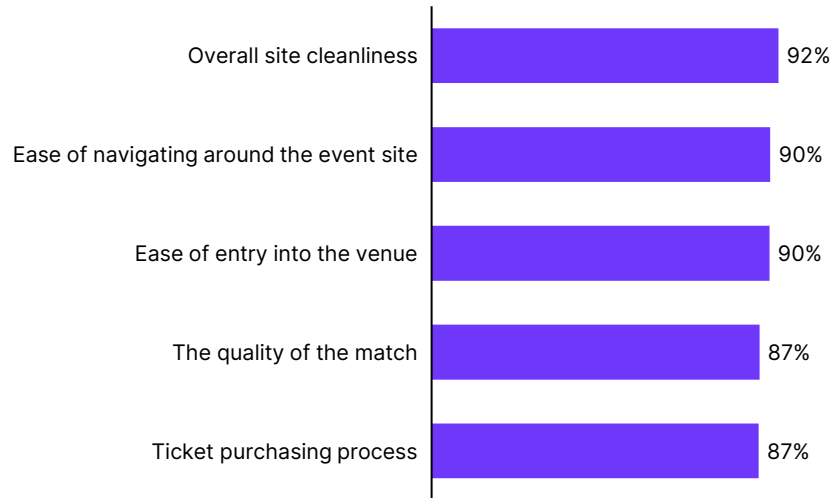
Attendance Satisfaction Summary

In 2023, average satisfaction was 7.9, 0.4 points higher than 2022. Overall site cleanliness and ease of navigating around the event site were notable elements for event satisfaction

Overall Satisfaction of Attendees



Top Five Elements (Net Satisfied + Very Satisfied)

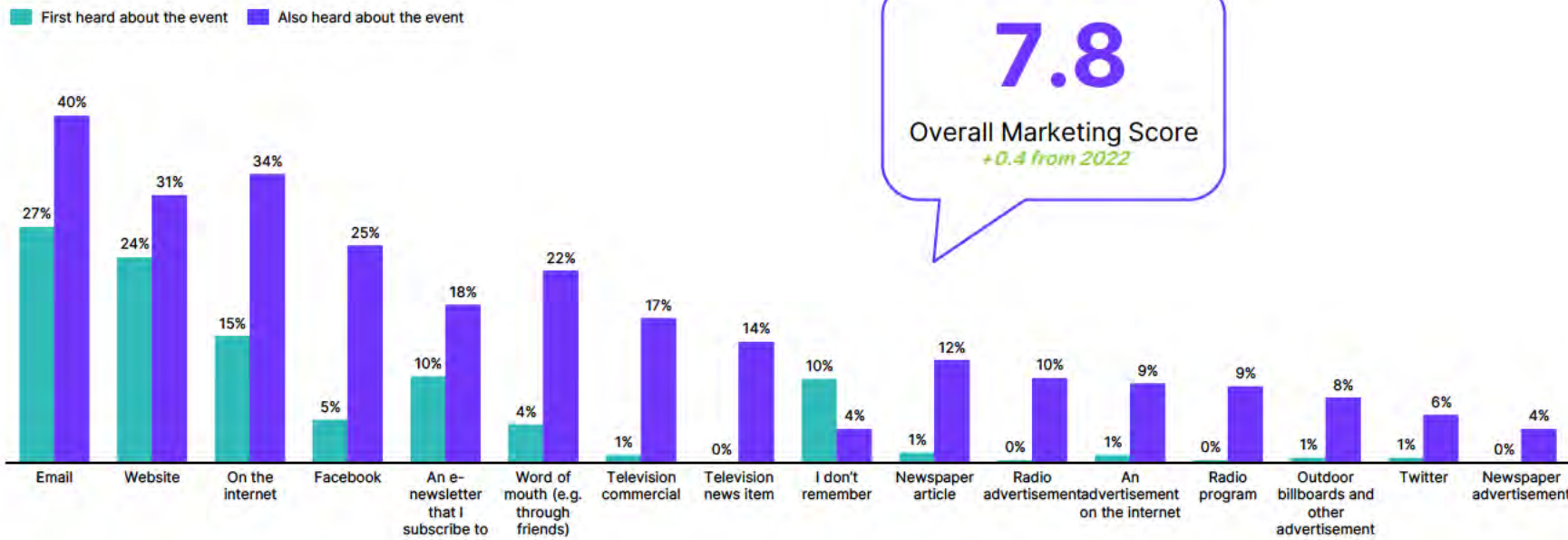


Source: GWS Giants 2023 Attendance Survey, n=339.

Marketing Summary

Email was the main driver of both primary and secondary awareness, with the website also one of the main sources of information for hearing about the event

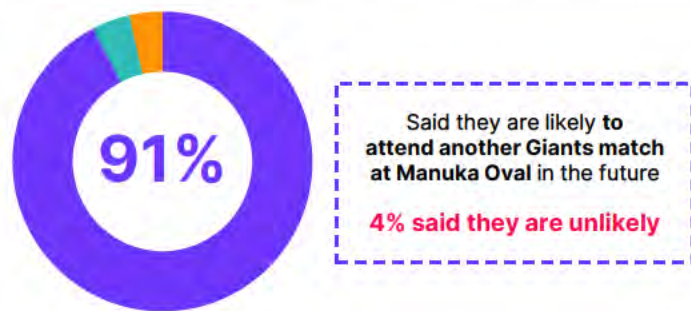
Sources of Information for Hearing about Event



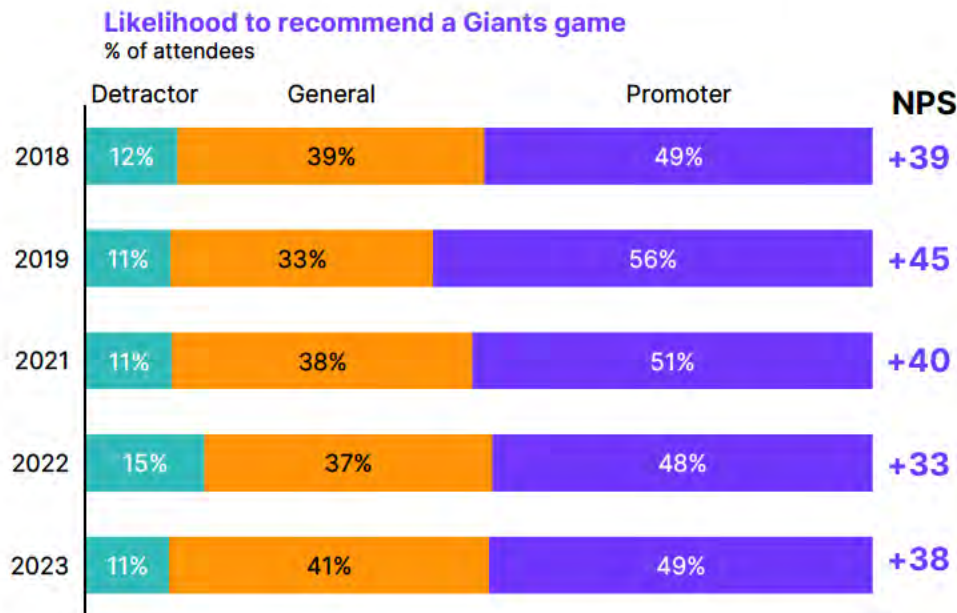
Source: GWS Giants 2023 Attendance Survey, n=339.

Net Promoter Score Summary

48% of event attendees are classified as promoters, with Giant's fixtures generating a N-Score of 38, 5 points higher than last year



LIKELY   1% pts on 2022
 NEUTRAL   1% pts on 2022
 UNLIKELY   1% pts on 2022



Source: GWS Giants 2023 Attendance Survey, n=339.

100%

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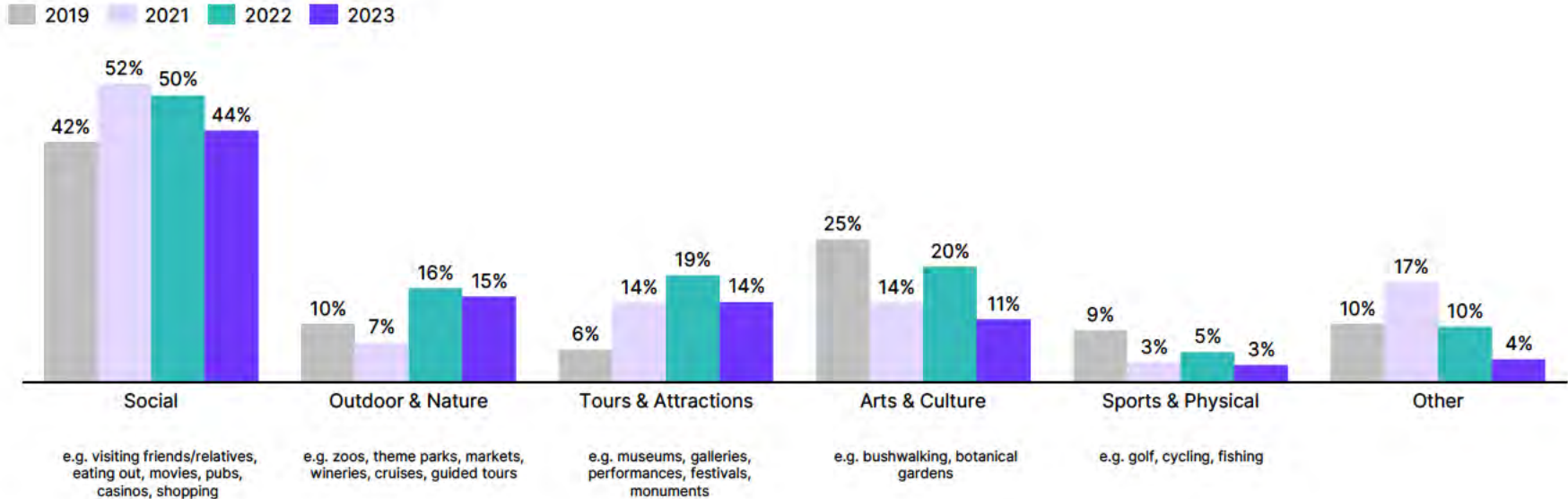
Appendix

Other Activities Summary

Social remains the most popular activity among respondents; with almost half (44%) engaging with this activity

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

% of Interstate Visitors

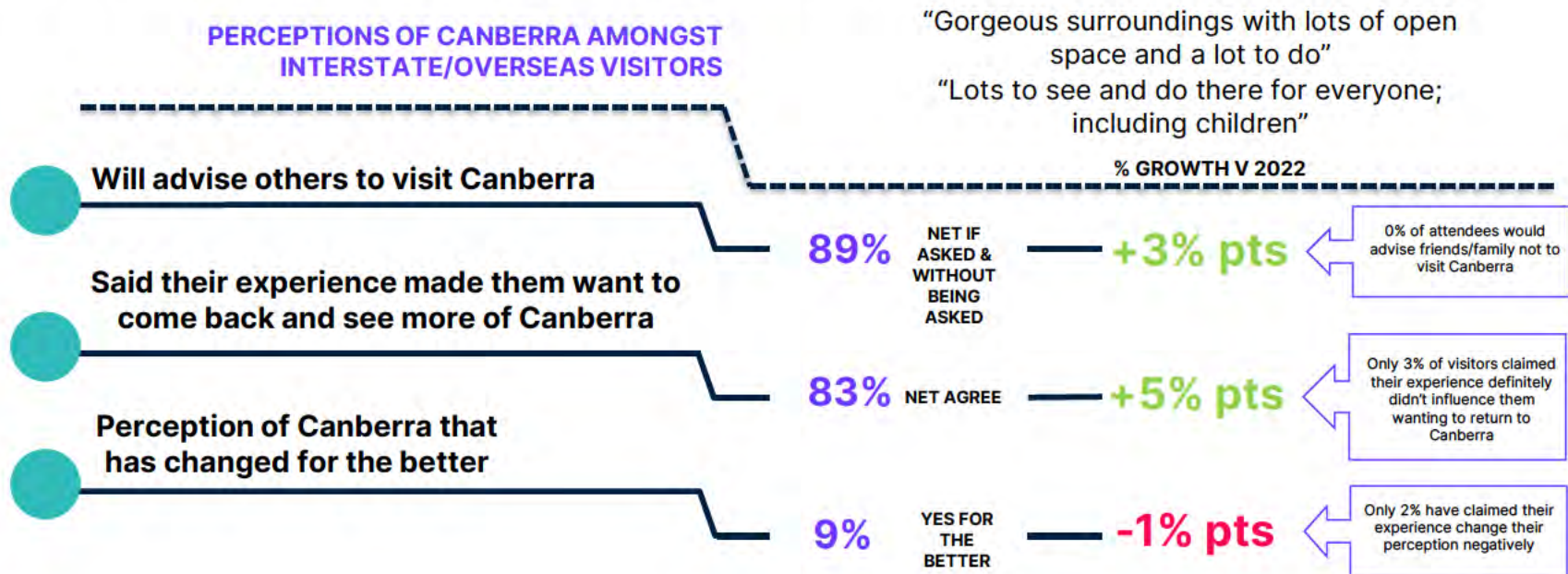


Source: GWS Giants 2023 Attendance Survey, n=339. Visitors = 101

Advocacy of Canberra Summary

89% of attendees will advise other to visit Canberra based on their experience at the Giants' matches this year, with 83% stating their experience made them want to visit Canberra again

PERCEPTIONS OF CANBERRA AMONGST INTERSTATE/OVERSEAS VISITORS



Source: GWS Giants 2023 Attendance Survey, n=339. Visitors = 101

Community Metrics Summary

90%

(1% pts v 2022)

It helps enhance community spirit, pride and enjoyment

75%

(-2% pts v 2022)

It makes me proud to be from Canberra / ACT

74%

(-4% pts v 2022)

Having it in Canberra creates a real buzz in the city

93%

(1% pts v 2022)

It helps make Canberra / ACT a more enjoyable place to live



CANBERRA



GIANTS

ACT COMMUNITY

SENTIMENT

(NET AGREE)

92%

(Level v 2022)

It is well-liked and positively embraced by the people of Canberra / ACT

65% agreed that Giants players are positive role models in the community

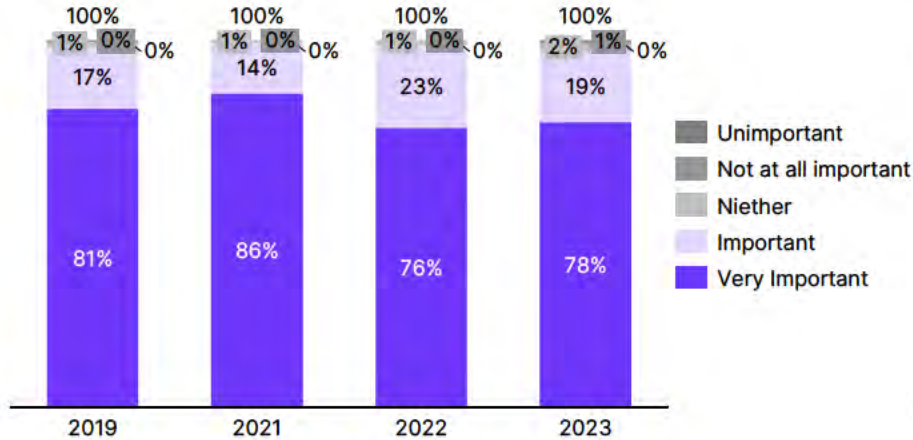
Source: GWS Giants 2023 Attendance Survey, n=339. Locals = 238

Giants' Games Importance Summary

97% of attendees believe it is important that Canberra/ACT continue to host Giants' games in the future, whilst 90% believe the government needs to be involved in doing so

Importance of hosting Giants' games in Canberra/ACT

% of Locals



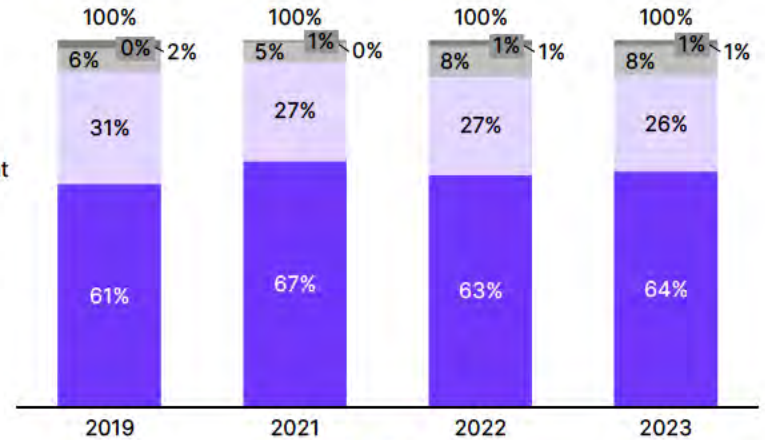
97%

Net Agree

-2% pts YOY

Importance of ACT Govt. Involvement in hosting Giants' Games in Canberra/ACT

% of Locals



90%

Net Agree

Flat YOY

Source: GWS Giants 2023 Attendance Survey, n=339. Locals = 238

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Sponsor Recall & Perception

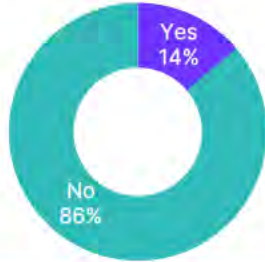
AFL Women's Insights

ACT Sport & Recreation

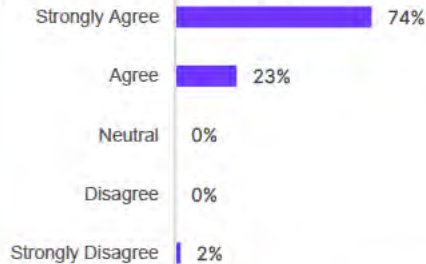
Appendix

AFLW Summary

Q. Did you attend the AFL Women's game GIANTS vs Brisbane Lions, 4th September 2023 at Manuka Oval?



Q. I would encourage friends and family to attend professional women's sporting events in the future



Q. Please indicate your agreement with the following statements regarding AFL Women's GIANTS matches held in Canberra:

Women's sport should be better supported than it currently is



Net Agree
(Strongly Agree/Agree)

75%

Having the AFL Women's play in Canberra is great for women's sport



84%

Canberra was a great location for hosting the AFL women's games



80%

Hosting the AFL Women's in Canberra was well-liked and positive for the state



72%

The AFL Women's games held in Canberra enhanced the overall competition



68%

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Source: GWS Giants 2023 Attendance Survey, n=339.

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ACT Sport & Recreation Key Metrics

 	Total
Online & Intercept Survey Sample Size	639
Economic Impact (Visitor Expenditure)	\$1,695,033
Economic Activity (Local)	\$1,265,386
Visitation	7,651
Ticketed Attendance	30,526
Bed Nights	8,945
Ave. Visitor Length of Stay	1.17
Ave. Visitor Daily Spend	\$150.31
Ave. Local Spend per Person	\$56.47
Likelihood of Return Visit	92%
Net Promoter Score	38
Enhances community spirit, pride, & enjoyment	90%
Event Satisfaction Rating	7.9
Overall Marketing Score	7.8

In-Scope Visitors				Locals
Total In-scope	Interstate - Overnight	Interstate - Daytrip	Overseas	
199	153	46	0	427
\$1,695,033	\$1,609,359	\$85,674	\$0	
				\$1,265,386
7,651	5,891	1,724	0	
	7,616		0	22,408
8,945	8,945		0	
	1.17	0	0	
	\$179.76	\$49.68	0	

Source: GWS Giants 2023 Attendance Survey, n=339. GWS Giants 2023 Intercept Survey, n = 300. Attendance metrics provided by GWS Giants.

Giants Economic Impact: YoY Analysis

217

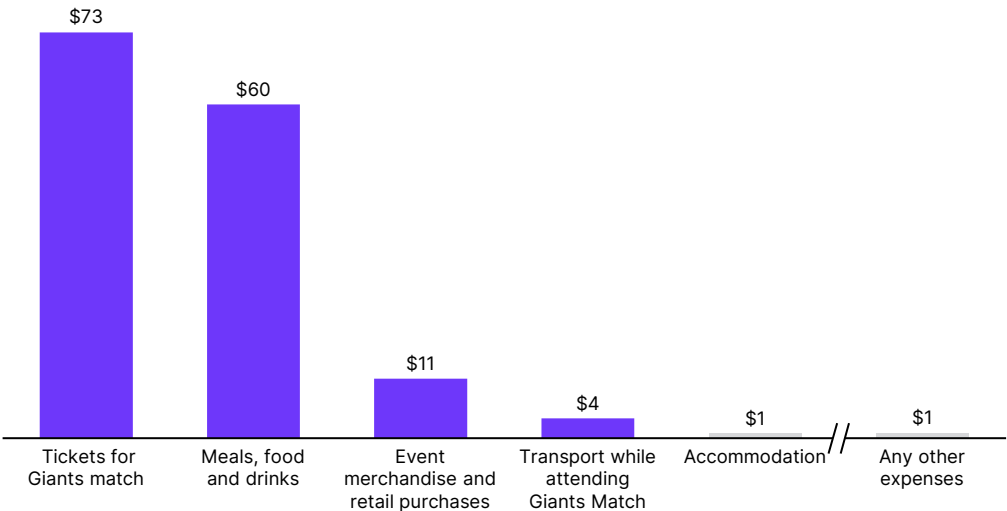
- Average daily spend was up for both daytrippers and overnighers in 2023 (+14% and +10% respectively). Accommodation was the main driver in the overall increase in overnigher spent, with meals, foods and drinks driving the increase for daytrippers
- Whilst average spend has increased, length of stay has decreased year-on-year. This coupled with a decrease in attendance is the main reason for a decline in direct expenditure. Attendees are likely to travel for a smaller portion of time likely due to the rising cost of living
- In 2023 there were 3 x matches played in Canberra v 4 x matches in 2022; per match the average Direct Expenditure was \$541k in 2022 v \$565k in 2023, 4% higher
- The 2022 GWS Giants Economic Impact Study recorded 841 total respondents; 129 of which were in-scope. This represents research accuracy to +/- 4% at a 95% confidence level. The 2023 GWS Giants Economic Impact Study recorded 639 total respondents; 199 of which were in-scope. This represents research accuracy to +/- 2% at a 95% confidence level. This year's sample size for in-scope visitors was more robust and indicates more accurate results than previous studies

Local Average Spend \$56 per person

Tickets for the Giants matches was the main source of group expenditure among ACT residents; followed by meals, food and drinks

Average Local Group Expenditure as a Result of 2023 GWS Giants Home Games

\$ | ACT Residents



Local Residents

\$56

Per person expenditure

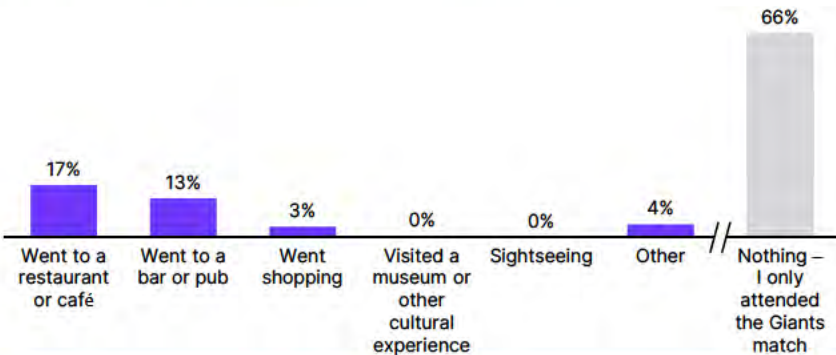
Local resident per person expenditure as a result of 2023 Giants home games.

This is calculated based on an average group size of 2.6 people and group expenditure of \$149.

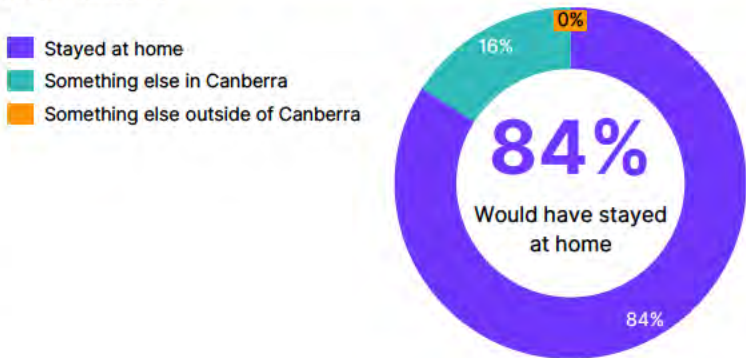
Source: GWS Giants 2023 Attendance Survey, n=339. Locals = 238

Local Perception of Giants Match in ACT²¹⁹

Leisure Activities whilst in ACT for Giants Games % ACT Residents



What local residents would have done instead of attending % ACT Residents



97%



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

90%



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

Source: GWS Giants 2023 Attendance Survey, n=339. Locals = 238

Giants Players are Positive Role Models

220

Do you see the GWS Giants players as positive role models in the community?

65%
Yes

(32% Unsure)



Why do you see the GWS Giants players as positive role models in the community?

"They create a way for those in Canberra to look at people in sport and see that there are people from their hometowns doing what they want to do"

"They do a lot of community outreach, with schools and community groups"

"Through their clinics, school visits & open training sessions they promote sport and healthy activities"

"Players give younger people an example of a fit and healthy lifestyle to aspire to"

"It brings families and friends together and promotes a healthy activity"

Source: GWS Giants 2023 Attendance Survey, n=339. Locals = 238

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GWS Giants Attendee Profile

Giants attendees are more likely to be male, aged between 55-64 and working full time; with a household income between \$100k - \$200k

Gender



62% Male



38% Female

Household Status



Single
14%

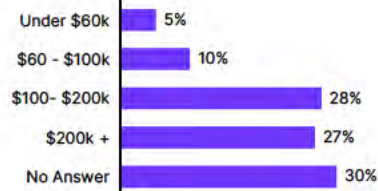


Couple
23%

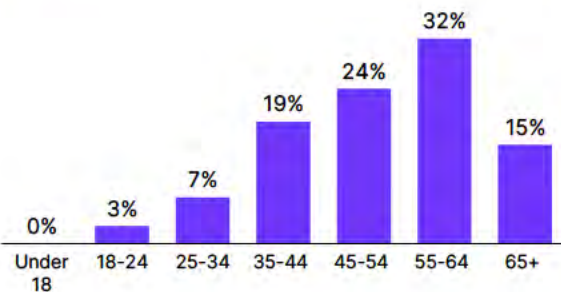


Family
64%

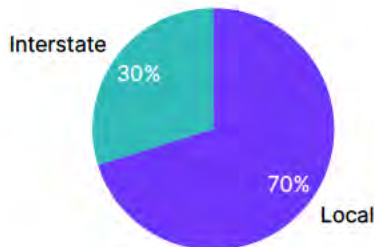
Household Income



Age



Location



Household

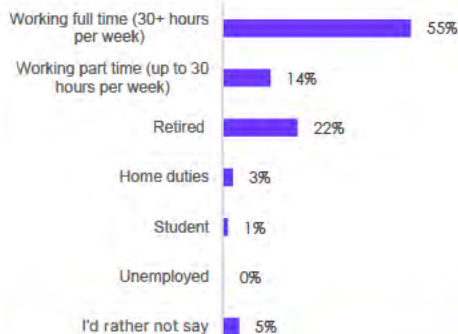
55%
Working Full
Time



Source: GWS Giants 2023 Attendance Survey, n=339

Further GWS Giants Demographics

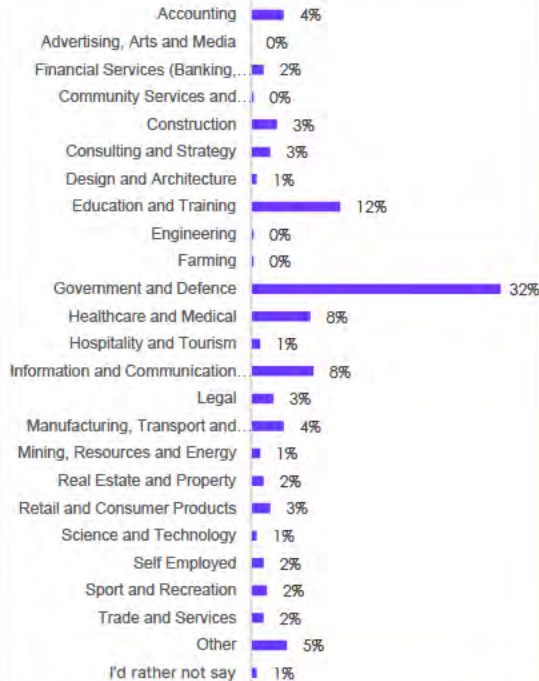
Q. Which of the following best describes your current situation?



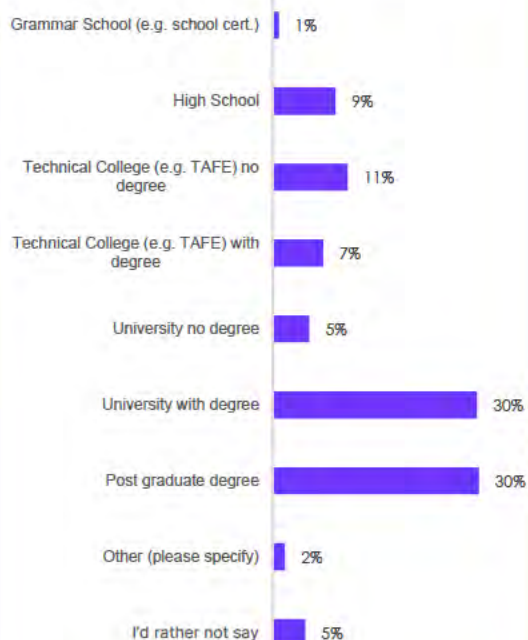
Q. Do you own a small business in the ACT Region?



Q. Which best describes the industry/sector you currently work in?



Q. What is the highest level of education you have received?

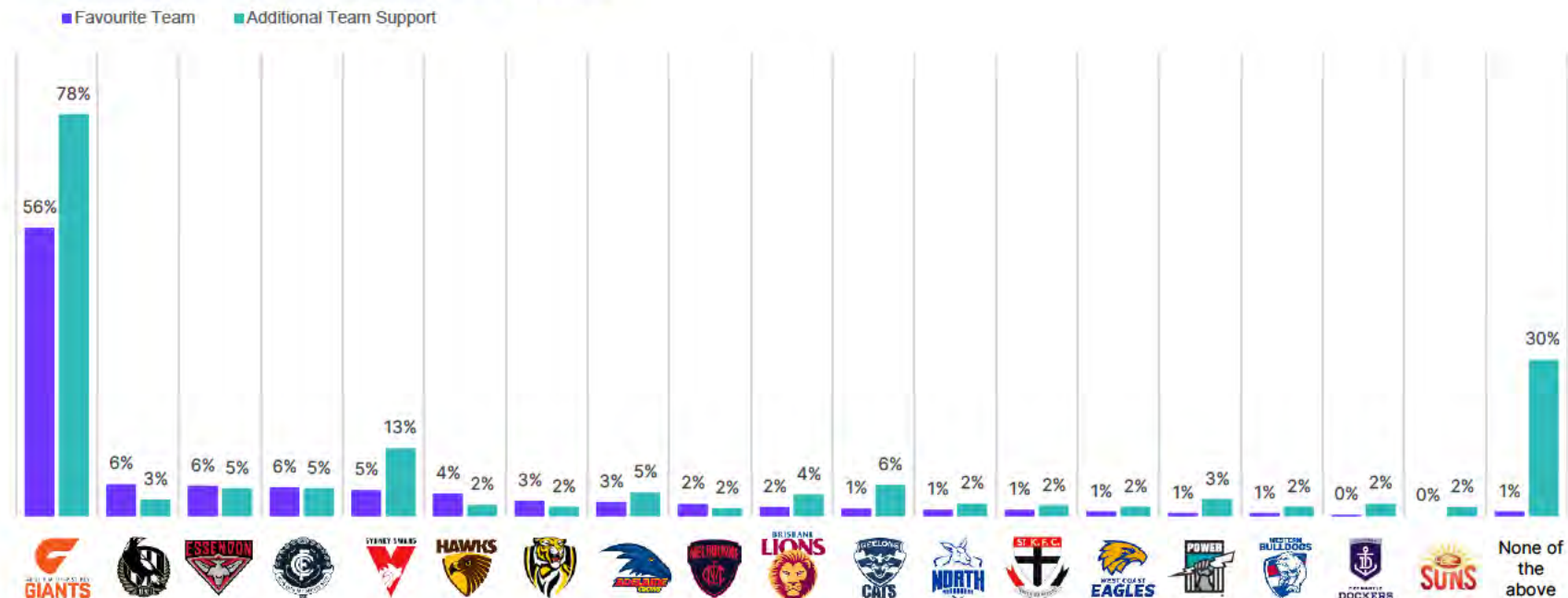


Source: GWS Giants 2023 Attendance Survey, n=339

Favourite AFL Team

224

Favourite AFL Team and Additional Team Support



Source: GWS Giants 2023 Attendance Survey, n=339

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