

2016

TABtouch Inter Dominion Western Australia 2016

ECONOMIC IMPACT REPORT



FOCUSED EVENT THINKING

Harness Racing Australia /

Economic Impact of the TABtouch Inter Dominion Perth 2016

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1. Summary of Key Findings /

The key findings from the research of ID16 include: -

- The majority of attendees live in one of the host cities 80.3% whilst a further 10.9% live in other parts of Western Australia. Interstate attendees represented 4.5% and overseas attendees 4.3%.
- The event attracted 1,302 primary purpose out-of-region visitors to the host cities in order to attend the ID16. This represents 15.5% of the total individual attendees at the event. The large majority of these primary purpose out-of-region visitors were from other parts of WA (752).
- ID16 generated 5,845 visitor nights in Western Australia (the majority of these – 4,358 where in the cities that hosted ID16 race meetings). Just over half of these overnight stays were from interstate visitors (3,073).
- The total direct spending for ID16 was just over \$6.17 million in Western Australia – which represents the amount of money spent in Western Australia by everyone who visited the event.
- The total direct in-scope expenditure was \$2.71 million in the host cities – which represents the new money that has entered the host cities' economy that would not otherwise have, had the event not been staged.
- The total direct in-scope expenditure was \$0.55 million in other parts of Western Australia – which represents the new money that has entered the economy in other parts of Western Australia that would not otherwise have, had the event not been staged.
- ID16 generated a gross value added contribution of \$7.05 million in the host cities – which represents the total amount of economic activity supported by the event. This further supports more than 63 FTE jobs in the host cities.
- ID16 generated a gross value added contribution of \$0.65 million in other parts of WA – which represents the total amount of economic activity supported by the event. This further supports more than 6 FTE jobs in other parts of WA.

2. Background Information /

2.1 Introduction

IER was commissioned by Harness Racing Australia (HRA) to undertake an economic assessment of the TABtouch Inter Dominion Perth 2016 (ID16). The event was held in Perth and Bunbury across four race meetings in late November and early December 2016.

The study provides an assessment of the direct economic impact (direct in-scope expenditure) generated for Perth and WA economies as a result of hosting this event. The stated direct economic impact relates to the income that may have been lost to the host cities (Perth and Bunbury) as well as the broader WA economy had the event been held elsewhere outside of the region.

For the purposes of this study, the raceday host cities (Perth and Bunbury) have been aggregated as the 'Host Cities'. The primary measure of economic impacts, accruing from this event, are stated in direct in-scope expenditure' terms. This is consistent with other recent racing industry event economic studies undertaken by IER in WA. Additionally, the report also outlines the gross economic impact associated with the event – keeping in line with the approach undertaken for previous Inter Dominion events assessed over the last six years.

IER would like to acknowledge and thank HRA, RWWA, Gloucester Park Harness Racing and Bunbury Trotting Club for their assistance and support with this project.

2.2 Methodology

The methodology employed to undertake this assessment has been developed with consistency in mind, to ensure that past and future Inter Dominion assessments can be easily compared. The assessment of economic impacts is based upon key indicators which can be defined as follows:-

- **Direct in-scope expenditure:** - the calculation of direct in-scope expenditure effectively measures the total spending generated by all event motivated and extended stay visitors from outside the host city. This measure identifies the direct expenditure impacts that could be lost to the host cities and State if the event was not held in WA.
- **Gross Value added contribution:** - the calculation of value added contribution generated by ID16 is a measure that quantifies the extent to which the event contributed to the Gross Regional Product within the host city and WA. It takes into consideration all spending (irrespective of source) and as such, is not a direct proxy for what could be lost if the event was not held in the region. This measure is retained in the report for benchmarking purposes.
- **FTE employment impacts:** - the extent to which employment impacts can be allocated against ID16 depends upon the determination of the level of economic activity generated by the event. Employment that is identified as being a result of the increase in demand and expenditure generated by the event, leads to an increase in the level of full-time and/or part-time employment in the region. Outputs are referred to in terms of full time equivalent (FTE) positions and takes into account both full time and part time employment.

In preparing the economic impact assessment a number of assumptions are observed:-

Assumptions

In calculating the estimated direct spending attributable to the event, the following assumptions have been made:

- An 'attendee' is a person who visits an event, whether they are a resident of Western Australia or visiting the State from interstate or overseas.
- It is important for this assessment to convert attendances into unique individuals. Data recorded via the face-to-face survey tool suggested that visitors attended an average of 2.07 race meetings (there were four in total);
- Visitors from outside the region of assessment (Bunbury/Perth) who did not come to the specific region (Bunbury/Perth) for the primary purpose of attending the event have not been included in the analysis of direct in-scope expenditure. They have, however, been included in the analysis of gross economic benefit. In the case of extended stay visitors, only the expenditure related to the period for which they extended their stay in Bunbury/Perth is included in the assessment;
- The calculation of visitor expenditure did not include airfares as it is assumed this expenditure would have occurred outside of the region of assessment;
- Expenditure on event tickets has not been included in the estimated average daily expenditure as this is accounted for in the organiser contribution (comprised of organiser income and expenditure) to direct in-scope expenditure; and
- Spending made by event motivated and extended stay visitors on other people (including accompanying persons not at the event) has been included in the assessment.

Population of Interest

The population of interest to this study was attendees of the Inter Dominion between November 25 and December 9, 2016. In total, the event attracted attendances of 17,348, comprising of 8,370 individuals. IER conducted 553 face-to-face incidence interviews across the four event days.

Data Collection

The face-to-face incidence surveys were conducted at each of the four race meetings. The survey contained questions pertaining to demographics, visitor origins, primary purpose visitation and event related expenditures. Field researchers were deployed at each event to ensure representation of different types of attendees were gathered (i.e. general public, members, corporate and dining). The timing of data collection on these days was spread evenly across the available event period.

3. Attendances at the Event /

The ID16 attracted total attendances of 17,348 across the four event days.

Total attendances includes the attendance at multiple days by an individual. In order to calculate the economic impact results, these attendances must be converted to individual attendees. The survey revealed that the average person attended 2.07 events. Therefore, the total number of individuals who attended the Inter Dominion was 8,370.

Assumptions

- Attendance figures have been provided from the event organiser and have not been audited by IER.
- The measure of average days attended (2.07) was sourced from the attendee survey.

4. Demographic Profile /

The figure below illustrates that:

- The ID16 survey revealed a higher proportion of males (55%) compared to females (45%).
- The majority of attendees were residents of one of the host cities (80.3%) and a further 10.9% were from other parts of Western Australia.
- The face-to-face survey revealed 4.5% of attendees were from interstate and 4.3% from overseas.

A summary of gender and residence is presented in Figure 1 below:

Figure 1: Gender and Residence

| Characteristic | Category | N | % |
|----------------|--------------|-----|-------|
| Gender | Male | 305 | 54.7% |
| | Female | 247 | 45.3% |
| Residence | Host Cities* | 443 | 80.3% |
| | Other WA | 60 | 10.9% |
| | Interstate | 25 | 4.5% |
| | Overseas | 24 | 4.3% |

* Note, the host city is either Bunbury or Perth depending on event location

The face-to-face survey revealed that over 60% of attendees were aged over 40 years.

Figure 2: Age Categories

| Characteristic | Category | N | % |
|----------------|-------------|----|-------|
| Age | 16 - 29 | 96 | 19.9% |
| | 30 - 39 | 88 | 18.5% |
| | 40 - 49 | 97 | 20.0% |
| | 50 - 59 | 83 | 17.1% |
| | 60 - 69 | 82 | 17.0% |
| | 70 and over | 35 | 7.2% |

5. Direct Economic Impacts /

5.1 Origin of Visitors

As previously identified, based on the survey data collected during ID16, close to 20% of all attendees (19.7%) were from outside the host cities – comprised of intrastate (10.9%), interstate visitors (4.5%) and international visitors (4.3%).

The table below illustrates that 873 individuals attended ID16 from other parts of Western Australia, with a further 382 from interstate and 365 from overseas.

The total number of individual attendees was:-

Figure 3: Origin of Visitors

| Characteristic | Category | N |
|----------------|-----------------------|-------|
| Visitor Origin | Host Cities | 6,749 |
| | Other WA | 873 |
| | Interstate | 382 |
| | Overseas | 365 |
| Total | Number of individuals | 8,370 |

* Note, some figures may not add correctly due to rounding

5.2 Primary Purpose Visitors

The table below illustrates that the event was directly responsible for attracting 1,302 visitors to the host cities (made up of 507 day trippers and 795 visitors who stayed overnight). The majority of these visitors came from other parts of WA (797 visitors).

The table also reveals that 15.6% of all attendees were primary purpose visitors to one of the host cities.

Figure 4: Primary Purpose and Extended Stay Visitors (To Host Cities)

| Visitor Origin | Total | % of all Individuals | Day Trippers | Overnight Stay |
|----------------|--------------|----------------------|--------------|----------------|
| Intrastate | 797 | 9.5% | 491 | 305 |
| Interstate | 307 | 3.7% | 15 | 292 |
| Overseas | 198 | 2.4% | 0 | 198 |
| Total | 1,302 | 15.6% | 507 | 795 |

The table below illustrates that the event attracted 505 visitors to Western Australia (made up of 15 day trippers and 490 who stayed overnight).

Figure 5: Primary Purpose and Extended Stay Visitors (Western Australia)

| Visitor Origin | Total | % of all Individuals | Day Trippers | Overnight Stay |
|----------------|------------|----------------------|--------------|----------------|
| Interstate | 307 | 3.7% | 15 | 292 |
| Overseas | 198 | 2.4% | 0 | 198 |
| Total | 505 | 6.0% | 15 | 490 |

* Note, some figures may not add correctly due to rounding

Figure 17 in Appendix 1 illustrates the different permutations which exist for the different visitors types (by origin) for both the impact on the host cities and Western Australia.

5.3 Total Direct Spending

Overall, ID16 generated a total direct spending impact of just under \$6.2 million in Western Australia. The large majority of this (91.2%) occurred within the host cities within which the Inter Dominion race meetings were held. This spending represents spending by all attendees to the four events.

Figure 6: Total Direct Expenditure

| | Total Direct Spending in Host Cities | Total Direct Spending in Other Parts of WA | Total |
|--------------|--------------------------------------|--|--------------------|
| Host Cities | \$2,912,739 | \$0 | \$2,912,739 |
| Other WA | \$560,830 | \$101,049 | \$661,879 |
| Interstate | \$1,598,030 | \$327,218 | \$1,925,249 |
| Overseas | \$550,539 | \$117,160 | \$667,699 |
| Total | \$5,622,138 | \$545,427 | \$6,167,565 |

Local residents (within the host cities) generated more than 47% of this amount whilst interstate visitors generated a further 31%.

5.3.1 Total In-Scope Expenditure

As a subset to the total direct expenditure, visitor in-scope expenditure relates to spending made within a defined region (i.e. Perth/Bunbury and Western Australia) by visitors from outside of the defined region due to the event being staged. Figures 7 and 8 outline the visitor contribution to direct in-scope expenditure, from staging ID16, based on the survey data.

The estimated total visitor contribution, to direct in-scope expenditure, in the host cities from staging ID16 was \$1.7 million (see figure 7). The majority of the expenditure was a result of spending by interstate visitors who decided to travel to the host cities for the primary purpose of attending ID16. These attendees contributed \$1.21 million in direct in-scope expenditure.

Figure 7: Total Attendee Direct In-scope Expenditure (Host Cities)

| Visitor Origin | Total | Day Trippers | Overnight Stay |
|----------------|--------------------|-----------------|--------------------|
| Intrastate | \$89,811 | \$62,966 | \$26,845 |
| Interstate | \$1,211,923 | \$1,938 | \$1,209,985 |
| Overseas | \$461,211 | \$0 | \$461,211 |
| Total | \$1,762,945 | \$64,903 | \$1,698,042 |

Overall ID16 generated direct in-scope visitor expenditure of \$2.1 million in Western Australia (see figure 8). The majority of this expenditure (\$1.5 million) was generated by interstate primary purpose visitors. It is important to note that expenditure by intrastate residents has been excluded as this expenditure is not derived from out-of-state.

Figure 8: Total Attendee Direct In-scope Expenditure (Western Australia)

| Visitor Origin | Total | Day Trippers | Overnight Stay |
|----------------|--------------------|----------------|--------------------|
| Interstate | \$1,539,141 | \$1,938 | \$1,537,204 |
| Overseas | \$578,371 | \$0 | \$578,371 |
| Total | \$2,117,512 | \$1,938 | \$2,115,574 |

Assumptions

The visitor contribution to direct in-scope expenditure analysis (the total estimated expenditure made within the region by visitors from outside the region) incorporates the number of visitors, average daily expenditure by visitors and the average number of nights stayed.

In calculating the visitor contribution to direct in-scope expenditure, the following assumptions/conditions have been used: -

- Visitors who are Perth/Bunbury residents have been excluded from calculations as it is assumed that expenditure by these residents would be made elsewhere in Perth/Bunbury if the event was not held;
- For the purpose of the impacts in Western Australia, visitors who are Western Australia residents have been excluded from calculations as it is assumed that expenditure by these residents would be made elsewhere in Western Australia if the event was not held
- Visitors from outside Perth/Bunbury/Western Australia who did not come to Perth/Bunbury/Western Australia for the primary purpose of attending the event have been excluded as the expenditure would have been made elsewhere in Perth/Bunbury/Western Australia in the absence of the event. An exception to this is when visitors stay extra nights in Perth/Bunbury/Western Australia due to the event. In this case expenditure by visitors for the extra nights has been included in the visitor contribution to direct in-scope expenditure under the 'extended stay' categories;
- In the case of 'extended stay' visitors, only the expenditure relating to their extended stay period is included in this assessment; and

Figure 18 in Appendix 2 illustrates the different permutations which exist for the different expenditure profiles (by origin) for both Perth/Bunbury and Western Australia.

5.4 Other contributions to Direct In-Scope Expenditure

In addition to visitor expenditure, ID16 also generated direct in-scope expenditure through the following sources:-

- Fashion expenditure
- Wagering revenues that flow back to the State

Overall, 11% of attendees indicated that they purchased fashion items to wear to ID16 whilst 8% spent money on personal grooming. The table below illustrates the expenditure generated for these two industry sectors. ID16 generated just under \$250,000 spending on fashion and personal grooming within WA.

Figure 9: Fashion and Grooming Expenditure

| Visitor Origin | Number of Individuals | % who Purchase Fashion | % who spent on Grooming | Avg Spend on Fashion | Avg Spend on Grooming | Total Spend on Fashion | Total Spend on Grooming | Total Fashion & Grooming |
|--------------------|-----------------------|------------------------|-------------------------|----------------------|-----------------------|------------------------|-------------------------|--------------------------|
| Host Cities | 6,749 | 9.7% | 8.8% | \$174.13 | \$108.14 | \$114,380 | \$63,953 | \$178,333 |
| Other WA | 873 | 8.4% | 3.0% | \$178.62 | \$184.53 | \$13,030 | \$4,764 | \$17,793 |
| Interstate | 382 | 40.2% | 12.5% | \$286.50 | \$53.07 | \$44,024 | \$2,535 | \$46,560 |
| Overseas | 365 | 12.1% | 0.7% | \$0.00 | \$0.00 | \$5,758 | \$538 | \$6,296 |
| Total | 8,370 | 928 | 668 | | | \$177,192 | \$71,789 | \$248,981 |

The most popular items purchased overall were dresses (24.1%), shirt/blouse/polo (18.4%) and shoes (11.5%). The following table illustrates the fashion items purchased by men and women who attended the event. Average expenditure by attendees who did spend money on fashion was \$191.02.

Figure 10: Fashion items purchased

| Fashion Item | Males | | Females | | Minimum Total Number Purchased |
|-------------------|--------------------------|---------------------------|--------------------------|-----------------------------|--------------------------------|
| | Minimum Number purchased | % of males that purchased | Minimum Number purchased | % of females that purchased | |
| Skirt | 15 | 0.3% | 61 | 1.6% | 76 |
| Jacket | 45 | 1.0% | 15 | 0.4% | 61 |
| Ties | 0 | 0.0% | 15 | 0.4% | 15 |
| Handbag | 15 | 0.3% | 45 | 1.2% | 61 |
| Sunglasses | 15 | 0.3% | 61 | 1.6% | 76 |
| Suit | 45 | 1.0% | 30 | 0.8% | 76 |
| Jewellery | 15 | 0.3% | 45 | 1.2% | 61 |
| Hat/Fascinators | 30 | 0.7% | 30 | 0.8% | 61 |
| Dress | 61 | 1.3% | 258 | 6.9% | 318 |
| Shirt/Blouse/Polo | 91 | 2.0% | 152 | 4.0% | 243 |
| Pants/Trousers | 45 | 1.0% | 61 | 1.6% | 106 |
| Shoes | 91 | 2.0% | 61 | 1.6% | 152 |
| Socks | 0 | 0.0% | 0 | 0.0% | 0 |
| Scarves | 0 | 0.0% | 15 | 0.4% | 15 |
| TOTAL | 470 | | 848 | | 1,319 |

Please note: - some individuals have responded about items that they purchased (or paid for) that may have been worn by another person (i.e. partner).

Overall, as the table below demonstrates, over nine in every ten attendees did not spend any money on personal grooming for ID16. The most popular personal grooming was nails (5.8%) and hair (4.7%). Average expenditure by attendees who did spend money on personal grooming was \$107.55.

Figure 11: Expenditure on Personal Grooming

| Personal Grooming | % |
|-------------------|-------|
| Nothing | 91.1% |
| Nails | 5.8% |
| Hair | 4.7% |
| Tanning | 1.5% |
| Waxing | 0.7% |
| Make-up | 1.5% |
| Total | 100% |

Additionally, more than \$17 million was wagered on the 2016 Inter Dominion. This resulted in just under \$1.4 million in net wagering revenues flowing back into the State. Of this amount, \$572,541 was generated by intrastate, interstate and overseas visitors and punters.

5.5 Economic and Tourism Impacts

5.6.1 Total Direct In-Scope Expenditure for Host Cities

Total direct in-scope expenditure represents new money that has entered the host cities' economy that would not otherwise have, had the event not been staged.

ID16 generated direct in-scope expenditure of \$2.7 million within the economy of the host cities. The following table provides a summary of the total estimated direct in-scope expenditure generated in the host cities by the ID16:-

Figure 12: Direct In-scope Expenditure (Host Cities)

| Direct In-Scope Expenditure | Total |
|---------------------------------|--------------------|
| Other WA Visitor Contribution | \$560,830 |
| Interstate Visitor Contribution | \$1,598,030 |
| Overseas Visitor Contribution | \$550,539 |
| Total | \$2,709,399 |

Total direct in-scope expenditure for the Host Cities \$2,709,399

5.6.2 Total Direct In-Scope Expenditure for Other Parts of Western Australia

Total direct in-scope expenditure represents new money that has entered the economy in other parts of Western Australia that would not otherwise have, had the event not been staged.

ID16 generated direct in-scope expenditure of just under \$450,000 attributable to other parts of Western Australia. Figure 13 provides a summary of the total estimated direct in-scope expenditure generated in other parts of Western Australia by the ID16:-

Figure 13: Direct In-scope Expenditure (Other Parts of Western Australia)

| Direct In-Scope Expenditure | Total |
|---------------------------------|------------------|
| Interstate Visitor Contribution | \$327,218 |
| Overseas Visitor Contribution | \$117,160 |
| Total | \$444,378 |

Total direct in-scope expenditure for other parts of Western Australia \$444,378

5.6.3 Total Visitor Nights Generated by the Inter Dominion

The table below illustrates that event motivated intrastate visitors generated 705 visitor nights in Western Australia as a result of attending ID16. The majority of these visitor nights (630) were in the host cities, with the remainder in other parts of Western Australia.

Interstate visitors generated 3,073 visitor nights in Western Australia as a result of attending ID16. Overseas visitors generated an additional 2,066 visitor nights in Western Australia.

Figure 14: Total Visitor Nights Generated by ID16

| Visitor Nights Generated | Western Australia (incl. Host Cities) | Host Cities |
|--------------------------|--|--------------|
| Intrastate Visitors | 705 | 75 |
| Interstate Visitors | 3,073 | 2,474 |
| Overseas Visitors | 2,066 | 1,809 |
| Total | 5,845 | 4,358 |

* Note, some figures may not add correctly due to rounding

5.6.4 Gross Value Added

In order to calculate the gross value added impact of ID16, the total expenditures (at both State and Regional level) are then distributed to industry sectors and the resultant value added, household income and employment outcomes calculated by use of the industry ratios within the input-output table. It is assumed that GST revenue is directed back to the State – and is used to fund government administration, health and education expenditures.

The direct impacts are the value added, household income and employment in the industries supplying the Inter Dominion, calculated using the ratios of the various measures for the relevant ANZSIC sectors as identified in the input-output table.

The calculation of the induced effects (allocated to industry in which the impact occurs) is undertaken by running an impact assessment, and tracing the whole of economy effect of the expenditure patterns linked to the Inter Dominion.

Real gross value added is the commonly accepted general measure of the quantity of goods and services that become available from economic activity. It is measured as the real value of output in the economy less the real cost of goods and services used as intermediate inputs. In terms of measuring the real contribution to the region's economy, this measure is more appropriate than the output method.

In calculating the value added generated by ID16, the majority of local resident spending is excluded as it represents a redistribution of monies already existing in the host city economies.

In summary the conclusions are that:

- ID16 generated a gross value added contribution of \$7.05 million in the host cities – which represents the total amount of economic activity supported by the event. This further supports more than 63 FTE jobs in the host cities.
- ID16 generated a net value added impact of \$2.76 million in the host cities – which represents the total amount of economic activity created by the event (often referred to as 'new money') – further supporting 32 FTE jobs in the host cities.
- ID16 generated a net value added impact of \$0.65 million in other parts of WA – which represents the total amount of economic activity created by the event (often referred to as 'new money') – further supporting 6 FTE jobs in other parts of WA.

Figure 15: Greater Host City Impacts (Induced Effects)

| | Expenditure | Value Added | | | Income | | | Employment | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------|-------------|-------------|
| | | Direct | Induced | Total | Direct | Induced | Total | Direct | Induced | Total |
| Agriculture, Forestry and Fishing | \$0.30 | \$0.14 | \$0.03 | \$0.17 | \$0.03 | \$0.01 | \$0.04 | 1.1 | 0.2 | 1.3 |
| Mining | \$0.00 | \$0.00 | \$0.14 | \$0.14 | \$0.00 | \$0.03 | \$0.03 | 0.0 | 0.3 | 0.3 |
| Manufacturing | \$0.26 | \$0.08 | \$0.34 | \$0.42 | \$0.05 | \$0.20 | \$0.25 | 0.6 | 2.7 | 3.4 |
| Electricity, Gas, Water and Waste Services | \$0.00 | \$0.00 | \$0.19 | \$0.19 | \$0.00 | \$0.05 | \$0.05 | 0.0 | 0.6 | 0.6 |
| Construction | \$0.00 | \$0.00 | \$0.10 | \$0.10 | \$0.00 | \$0.05 | \$0.05 | 0.0 | 0.7 | 0.7 |
| Wholesale Trade | \$0.14 | \$0.07 | \$0.25 | \$0.31 | \$0.04 | \$0.16 | \$0.20 | 0.4 | 1.5 | 1.8 |
| Retail Trade | \$0.43 | \$0.26 | \$0.34 | \$0.59 | \$0.16 | \$0.22 | \$0.38 | 3.2 | 4.3 | 7.5 |
| Accommodation and Food Services | \$1.17 | \$0.61 | \$0.15 | \$0.75 | \$0.36 | \$0.09 | \$0.45 | 8.4 | 2.0 | 10.4 |
| Transport, Postal & Warehousing | \$0.31 | \$0.14 | \$0.25 | \$0.39 | \$0.07 | \$0.13 | \$0.20 | 0.9 | 1.7 | 2.6 |
| Information Media & Telecommunications | \$0.00 | \$0.00 | \$0.15 | \$0.15 | \$0.00 | \$0.06 | \$0.06 | 0.0 | 0.7 | 0.7 |
| Finance and Insurance Services | \$0.00 | \$0.00 | \$0.47 | \$0.47 | \$0.00 | \$0.17 | \$0.17 | 0.0 | 1.3 | 1.3 |
| Ownership of Dwellings | \$0.00 | \$0.00 | \$0.57 | \$0.57 | \$0.00 | \$0.00 | \$0.00 | 0.0 | 0.0 | 0.0 |
| Property and Business Services | \$0.00 | \$0.00 | \$0.95 | \$0.95 | \$0.00 | \$0.60 | \$0.60 | 0.0 | 6.4 | 6.4 |
| Public Administration & Safety | \$0.11 | \$0.07 | \$0.05 | \$0.12 | \$0.05 | \$0.04 | \$0.10 | 0.6 | 0.5 | 1.0 |
| Education & Training | \$0.11 | \$0.08 | \$0.14 | \$0.23 | \$0.07 | \$0.13 | \$0.20 | 0.8 | 1.4 | 2.3 |
| Health care and social assistance | \$0.11 | \$0.09 | \$0.17 | \$0.25 | \$0.07 | \$0.14 | \$0.21 | 0.9 | 1.8 | 2.7 |
| Arts and recreation services | \$2.32 | \$0.90 | \$0.12 | \$1.02 | \$0.51 | \$0.06 | \$0.57 | 15.0 | 1.9 | 16.9 |
| Other Services | \$0.21 | \$0.11 | \$0.12 | \$0.23 | \$0.08 | \$0.08 | \$0.16 | 1.5 | 1.6 | 3.1 |
| Total | \$5.47 | \$2.54 | \$4.51 | \$7.05 | \$1.50 | \$2.22 | \$3.72 | 33.5 | 29.5 | 63.0 |

Figure 16: Other Parts of Western Australia Impacts (Induced Effects)

| | Expenditure | Value Added | | | Income | | | Employment | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------|------------|------------|
| | | Direct | Induced | Total | Direct | Induced | Total | Direct | Induced | Total |
| Agriculture, Forestry and Fishing | \$0.04 | \$0.02 | \$0.01 | \$0.04 | \$0.00 | \$0.00 | \$0.01 | 0.2 | 0.1 | 0.3 |
| Mining | \$0.00 | \$0.00 | \$0.01 | \$0.01 | \$0.00 | \$0.00 | \$0.00 | 0.0 | 0.0 | 0.0 |
| Manufacturing | \$0.03 | \$0.01 | \$0.03 | \$0.04 | \$0.01 | \$0.02 | \$0.03 | 0.1 | 0.3 | 0.3 |
| Electricity, Gas, Water and Waste Services | \$0.00 | \$0.00 | \$0.02 | \$0.02 | \$0.00 | \$0.01 | \$0.01 | 0.0 | 0.1 | 0.1 |
| Construction | \$0.00 | \$0.00 | \$0.01 | \$0.01 | \$0.00 | \$0.01 | \$0.01 | 0.0 | 0.1 | 0.1 |
| Wholesale Trade | \$0.01 | \$0.01 | \$0.02 | \$0.03 | \$0.00 | \$0.01 | \$0.02 | 0.0 | 0.1 | 0.2 |
| Retail Trade | \$0.05 | \$0.03 | \$0.03 | \$0.05 | \$0.02 | \$0.02 | \$0.03 | 0.3 | 0.3 | 0.7 |
| Accommodation and Food Services | \$0.26 | \$0.14 | \$0.01 | \$0.15 | \$0.08 | \$0.01 | \$0.09 | 1.9 | 0.2 | 2.1 |
| Transport, Postal & Warehousing | \$0.05 | \$0.02 | \$0.02 | \$0.05 | \$0.01 | \$0.01 | \$0.02 | 0.1 | 0.2 | 0.3 |
| Information Media & Telecommunications | \$0.00 | \$0.00 | \$0.01 | \$0.01 | \$0.00 | \$0.00 | \$0.00 | 0.0 | 0.0 | 0.0 |
| Finance and Insurance Services | \$0.00 | \$0.00 | \$0.03 | \$0.03 | \$0.00 | \$0.01 | \$0.01 | 0.0 | 0.1 | 0.1 |
| Ownership of Dwellings | \$0.00 | \$0.00 | \$0.05 | \$0.05 | \$0.00 | \$0.00 | \$0.00 | 0.0 | 0.0 | 0.0 |
| Property and Business Services | \$0.00 | \$0.00 | \$0.07 | \$0.07 | \$0.00 | \$0.05 | \$0.05 | 0.0 | 0.5 | 0.5 |
| Public Administration & Safety | \$0.01 | \$0.00 | \$0.00 | \$0.01 | \$0.00 | \$0.00 | \$0.01 | 0.0 | 0.0 | 0.1 |
| Education & Training | \$0.01 | \$0.01 | \$0.01 | \$0.02 | \$0.01 | \$0.01 | \$0.02 | 0.1 | 0.1 | 0.2 |
| Health care and social assistance | \$0.01 | \$0.01 | \$0.01 | \$0.02 | \$0.01 | \$0.01 | \$0.02 | 0.1 | 0.1 | 0.2 |
| Arts and recreation services | \$0.03 | \$0.01 | \$0.00 | \$0.02 | \$0.01 | \$0.00 | \$0.01 | 0.2 | 0.1 | 0.3 |
| Other Services | \$0.03 | \$0.02 | \$0.01 | \$0.03 | \$0.01 | \$0.01 | \$0.02 | 0.2 | 0.1 | 0.4 |
| Total | \$0.53 | \$0.27 | \$0.38 | \$0.65 | \$0.16 | \$0.18 | \$0.34 | 3.3 | 2.5 | 5.7 |

6. Appendix /

6.1 Appendix 1

The figure below illustrates the different permutations which exist for the different visitors types (by origin) for both the impact on the host cities and Western Australia.

Figure 17: Permutations for the different visitors

| | Sample | Primary Purpose to Perth/Bunbury | Extended Stay to Perth/Bunbury | Non PP/ES |
|---|--------------|----------------------------------|--------------------------------|--------------|
| Local Non PP/ES Day Trip | 6,749 | | | 6,551 |
| Local Non PP/ES Overnight Stay | | | | 198 |
| Other WA Primary Purpose Day Trip | 873 | 491 | 0 | |
| Other WA Primary Purpose Overnight Stay | | 261 | 0 | |
| Other WA Extended Stay Overnight Stay | | 0 | 44 | |
| Other WA Non PP/ES Day Trip | | | | 77 |
| Interstate Primary Purpose Day Trip | 382 | 15 | 0 | |
| Interstate Primary Purpose Overnight Stay | | 246 | 0 | |
| Interstate Extended Stay Overnight Stay | | 0 | 46 | |
| Interstate Non PP/ES Day Trip | | | | 75 |
| Overseas Primary Purpose Day Trip | 365 | 0 | 0 | |
| Overseas Primary Purpose Overnight Stay | | 121 | 0 | |
| Overseas Extended Stay Overnight Stay | | 0 | 77 | |
| Overseas Non PP/ES Day Trip | | | | 167 |
| Total | 8,370 | 1,135 | 167 | 7,068 |

6.2 Appendix 2

The figure below shows the different permutations which exist for the different expenditure profiles (by origin) for both Perth/Bunbury and Western Australia.

Figure 18: Permutations for the different visitor expenditure profiles

| Visitor Origin - Attendees | Number of Visitors (Individuals) | Average Daily Expenditure (Day Trip) | Average Daily Expenditure (Overnight Stay) | Average Length of Stay (in WA) | Average Length of Stay (in {event location}) | Direct In-Scope Expenditure in WA | Direct In-Scope Expenditure in {event location} |
|---|----------------------------------|--------------------------------------|--|--------------------------------|--|-----------------------------------|---|
| Perth Non PP/ES Day Trip | 6,551 | \$130.76 | | | | | \$856,626 |
| Perth Non PP/ES Overnight Stay | 198 | | \$373.76 | 1.4 | 1.4 | | \$102,654 |
| Other WA Primary Purpose Day Trip | 491 | \$128.19 | | | | | \$62,966 |
| Other WA Primary Purpose Overnight Stay | 261 | | \$0.00 | 2.4 | 0.0 | \$101,049 | \$0 |
| Other WA Extended Stay Overnight Stay | 44 | | \$358.47 | 1.7 | 1.7 | \$26,845 | \$26,845 |
| Other WA Non PP/ES Day Trip | 77 | \$83.43 | | | | \$6,410 | \$6,410 |
| Interstate Primary Purpose Day Trip | 15 | \$126.09 | | | | \$1,938 | \$1,938 |
| Interstate Primary Purpose Overnight Stay | 246 | | \$420.75 | 10.6 | 8.2 | \$1,426,336 | \$1,099,118 |
| Interstate Extended Stay Overnight Stay | 46 | | \$240.50 | 10.0 | 10.0 | \$110,868 | \$110,868 |
| Interstate Non PP/ES Day Trip | 75 | \$256.49 | | | | \$19,208 | \$19,208 |
| Overseas Primary Purpose Overnight Stay | 121 | | \$246.67 | 8.8 | 6.7 | \$380,530 | \$263,370 |
| Overseas Extended Stay Overnight Stay | 77 | | \$0.00 | 13.0 | 13.0 | \$197,841 | \$197,841 |
| Overseas Non PP/ES Day Trip | 167 | \$156.97 | | | | \$26,227 | \$26,227 |
| TOTAL | 8,370 | | | | | \$2,162,947 | \$1,814,790 |