

SPORTS EVENTS & VENUES
NOVEMBER 2002



 **ERNST & YOUNG**

Quality In Everything We Do

Melbourne 2002 World Masters Games

Economic Impact Assessment

Melbourne 2002 World Masters Games Ltd

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Key Findings

- Staging the 2002 World Masters Games in Victoria increased Victoria's Gross State Product (GSP) revenue and State taxes by the following:

	(\$Million)
Increase in Direct Expenditure	29.6
<hr/>	
Increase in GSP	55.6
<hr/>	
Increase in State Taxes	3.3

- Staging the 2002 World Masters Games in Victoria increased Australia's Gross Domestic Product (GDP) revenue and Commonwealth taxes by the following:

	(\$Million)
Increase in Direct Expenditure	23.5
<hr/>	
Increase in GDP	69.0
<hr/>	
Increase in Commonwealth Taxes	6.3

- The estimated number of interstate and international visitors to Victoria as a result of staging the 2002 World Masters Games were as follows:

	<i>Competitors</i>	<i>Accompanying Persons</i>	<i>Total</i>
Interstate Visitors	7,445	2,779	10,224
<hr/>			
International Visitors	6,286	2,649	8,935
<hr/>			
Total Interstate & International	13,731	5,428	19,159

- Staging the 2002 World Masters Games created a number of legacies and other benefits, which are discussed in section 7 of the report.



1. Introduction

The Melbourne 2002 World Masters Games (the “Games”) is a sports festival for mature athletes from around the world. The Games were staged over nine days, from 5 – 13 October 2002, at 62 different venues throughout Victoria. The Games hosted a total of 24,899 competitors from 97 countries, with the minimum age limit for competitors in most sports being 30-35 years of age.

The World Masters Games was first staged in Toronto, Canada in 1985, and has since been held in Denmark (1989), Brisbane (1994) and Portland USA (1998).

The Games offered competitors 29 different sports, which included:

- | | | |
|--------------|------------------|------------------|
| ■ Archery | ■ Hockey | ■ Squash |
| ■ Athletics | ■ Indoor Cricket | ■ Swimming |
| ■ Badminton | ■ Netball | ■ Table Tennis |
| ■ Baseball | ■ Orienteering | ■ Tennis |
| ■ Basketball | ■ Rowing | ■ Touch Football |
| ■ Canoeing | ■ Rugby | ■ Triathlon |
| ■ Cycling | ■ Shooting | ■ Volleyball |
| ■ Diving | ■ Soccer | ■ Weightlifting |
| ■ Golf | ■ Softball | |

Ernst & Young have been commissioned by Melbourne 2002 World Masters Games Ltd (“M2002”) to estimate the economic impact on the State of Victoria and on Australia as a result of staging of the Games in Victoria.

Our assessment of the economic impact is based on survey data collected by Newspoll, information provided by M2002, and has involved making various assumptions, which are documented in this report.

2. Methodology

2.1 Source of Information

Competitor surveys conducted by Newspoll were the primary source of information used to assess the economic impact of the Games. Face to face surveys were conducted by fully trained interviewers from Wednesday 2 October to Saturday 5 October 2002. Prospective respondents were screened and interviewed at the Games registration centre located in the World Trade Centre.

A total of 680 surveys were completed during the four days of interviewing to produce 340 surveys from competitors who usually live interstate and 340 surveys from competitors who usually live overseas.

A copy of the competitors survey has been attached at appendix one.

Information regarding the number and origin of competitors, the number and origin of registered accompanying persons and the event operational budget were obtained from M2002.

2.2 Methodology Adopted

The purpose of this study has been to estimate the economic impact to the State of Victoria and Australia as a result staging the Games. This has been achieved by estimating the direct and indirect expenditure of those people who visited the Victoria and Australia, or extended their stay in Victoria and Australia, specifically to compete in the Games.

The Direct Impact

The direct impact captures the direct spending increase in Victoria and Australia that is attributable to the Games being staged in Victoria. Expenditure by Victorian residents is excluded from our assessment of the Victorian impact. This treatment is based on the assumption that Victorians competing in the Games are most likely using funds already committed to recreational activities within the State, and thus no additional benefit is accrued to Victoria. Likewise, when measuring the direct impact to Australia, expenditure by all Australian residents is excluded. The direct impact incorporates both competitor and accompanying person expenditure, and event operations expenditure.



Visitor Expenditure

Visitor expenditure captures the spending of all interstate or international competitors and accompanying persons who come to Victoria and visit other parts of Australia, or extend their stay, specifically because of the Games.

Event Operations Impact

The event operations impact considers the source of revenue earned by the event, and the location of expenditure incurred when staging an event (i.e. from within or outside Victoria and Australia). The amount of revenue that arises from outside Victoria, which is ultimately spent within Victoria when hosting an event, is referred to as the event operations impact. This same methodology is also applied to determine the event operations impact to Australia.

The Indirect Impact

The indirect impact measures the multiplier effects of the direct expenditure throughout the economy. The direct additional spending produces a second round of spending and income generation. For example, additional money spent at restaurants is allocated between the additional material inputs (such as food and drink), wages, and profits of the proprietor. Wages spent by the employees for example, on household items, circulates the money throughout a broader section of the economy creating indirect benefits.

The multipliers used and therefore the size of the indirect impact depends on the type of direct expenditure, and the structural features of the regions.

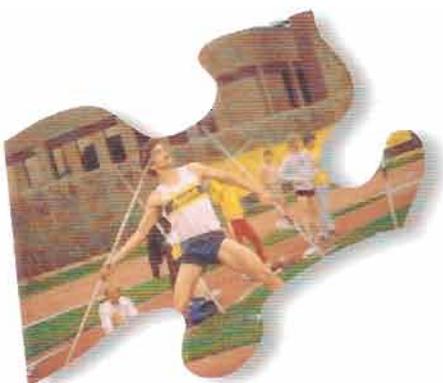
3. Interstate & International Visitors

M2002 have provided us with the total number of interstate and international visitors. This is represented by competitors and registered accompanying persons. A registered accompanying person represents a visitor who is not competing in the Games but has paid the accompanying person registration fee.

In addition to the registered accompanying persons, the surveys also identified additional accompanying persons that were not officially registered but are still included in our estimate of economic impact. Based on the survey data, an average of 0.2 people per competitor were identified as unregistered accompanying persons. For each international competitor the survey also identified 0.2 unregistered accompanying persons for each competitor. These results were extrapolated over the total number of interstate and international competitors to determine the total number of unregistered accompanying persons.

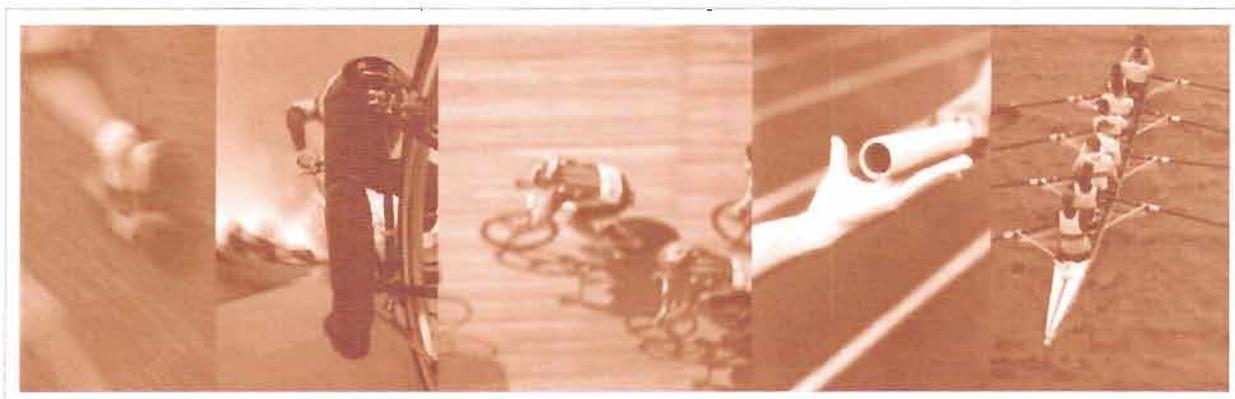
As previously mentioned, 680 competitor surveys were conducted by Newspoll, of which 340 were interstate and 340 were international. Of the interstate competitors surveyed, 99.4% stated that they visited Victoria specifically for the Games, while the remaining 0.6% indicating that they extended their stay in Victoria because of the Games. 95.6% of international competitors visited Victoria specifically for the Games, while the remaining 4.4% extended their stay because of the Games. Therefore, the survey results indicate that all competitors either visited Victoria specifically for the Games or extended their stay in Victoria because of the Games.

The table over the page provides a summary of the total number of interstate and international visitors to Victoria as a result of the Games.



Summary of Interstate and International Visitors at the 2002 World Masters Games

Visitors	Total Visitors
Interstate	
Interstate competitors	7,445
Accompanying persons	<u>2,779</u>
	10,224
International	
International competitors	6,286
Accompanying Persons	<u>2,649</u>
	<u>8,935</u>
Total Interstate and International Visitors	<u>19,159</u>



4. Expenditure by Interstate & International Visitors

From the surveys conducted on interstate and international competitors we have been able to estimate average daily expenditure of these visitors during their stay in Victoria and other parts of Australia. Competitors were asked to provide an estimate of their expenditure in three distinct categories, being:

- Accommodation (including any meals and drinks at the accommodation).
- Any other meals, food and drinks or other entertainment costs, such as the movies and tourist attractions.
- Any other expenses (excluding travel to and from Victoria/Australia)

Below is a summary of expenditure by category for interstate and international competitors:

Visitors	Accom.	Meals / Entertain	Other	Total Average Daily Exp.
Interstate Competitors				
Visiting Victoria specifically for the Games	\$51.00	\$37.75	\$16.28	\$ 105.03
Extending their stay in Victoria because of the Games	\$80.21	\$53.48	\$80.21	\$ 213.90
International Competitors				
Visiting Victoria specifically for the Games	\$80.01	\$45.70	\$22.20	\$ 147.91
Extending their stay in Victoria because of the Games	\$54.66	\$37.89	\$16.19	\$ 108.74

5. Economic Impact of the 2002 World Masters Games

The estimated economic impact of the Games can be split between the direct impact and the indirect impact.

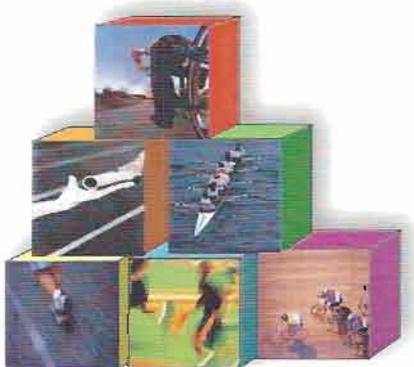
As discussed in our methodology section, the direct impact captures the spending increase by visitors that is attributable to the event being staged in Victoria, and the event operations impact. The indirect impact measures the multiplier effects of the direct expenditure throughout the Victorian and Australian economies.

5.1 Direct Impact

5.1.1 Visitor Expenditure

The direct impact of visitors includes expenditure associated with two distinct groups. Firstly, the total spending generated by those interstate and international visitors who specifically came to Victoria for the event. Secondly, visitor expenditure considers the expenditure of those visitors that did not come to Victoria specifically to attend the Games but extended their stay in Victoria because of the Games. Visitors include both competitors and accompanying persons.

The tables displayed over the page include the estimated increase in direct expenditure in Victoria by interstate and international visitors who attended the Games and the increase in direct expenditure in Australia by international visitors who attended the Games.



Direct Expenditure within Victoria

	Number of Visitors (1)	Average Daily Expenditure (2)	Average Length of Stay (3)	Total Expenditure (\$000)
Interstate:				
Visiting specifically for the event				
- Competitors	7,401	\$105.03	10.3	\$8,006
- Accompanying Persons	2,763	\$105.03	10.3	\$2,989
Extended stay in Victoria for the event				
- Competitors	44	\$213.90	5.5	\$52
- Accompanying Persons	16	\$213.90	5.5	\$19
International:				
Visiting specifically for the event				
- Competitors	6,009	\$147.90	12.9	\$11,464
- Accompanying Persons	2,532	\$147.90	12.9	\$4,831
Extended stay in Victoria for the event				
- Competitors	277	\$108.74	6.5	\$196
- Accompanying Persons	117	\$108.74	6.5	\$83
Total increase in spending within Victoria by interstate & international visitors				\$27,640

Direct Expenditure within Australia

	Number of Visitors (1)	Average Daily Expenditure (2)	Average Length of Stay (3)	Total Expenditure (\$000)
International:				
Visiting specifically for the event				
- Competitors	6,009	\$147.90	17.5	\$15,552
- Accompanying Persons	2,532	\$147.90	17.5	\$6,554
Extended stay in Australia for the event				
- Competitors	277	\$108.74	6.5	\$196
- Accompanying Persons	117	\$108.74	6.5	\$83
Total increase in spending within Australia by international visitors				\$22,385

Note: Numbers may not equate due to rounding

Notes

- (1) *The number of visitors, by category and origin, has been discussed in section 3 of this report.*
- (2) *The average daily expenditure of interstate and international residents who visited Victoria specifically for the event, and who extended their visit because of the event, were derived from survey data supplied by Newspoll.*
- (3) *Average length of stay of interstate and international residents who visited Victoria specifically to attend the event includes total nights spent in Victoria and is based on survey data supplied by Newspoll.*

The average length of stay of interstate and international residents who extended their stay because of the event includes only the additional nights spent in Victoria because of the event, and is based on information supplied by Newspoll.

In estimating the direct expenditure within Australia, the average length of stay of international visitors includes nights spent in Victoria plus additional nights spent in other parts of Australia.

5.1.2 Event Operations Impact

The event operations impact considers the source of revenue earned, and the location of expenditure incurred by event organisers when staging the event (i.e. from within or outside Victoria and Australia). The amount of revenue that arises from outside Victoria or Australia, which is ultimately spent within Victoria or Australia when staging an event, is referred to as the event operations impact.

Total revenue generated from the Games was \$12.3m, while expenditure associated with staging the Games also equated to \$12.3m. M2002 have indicated that 19.7% of revenue was generated from outside Victoria, while 10.6% was sourced from outside Australia. With expenditure, 80% of expenditure was incurred with Victoria and 84% of expenditure was incurred within Australia. Accordingly the event operations impact of the Games for Victoria and Australia is summarised over the page:

Event Operations Impact on Victoria

Event Related Expenditure incurred within Victoria	\$9,840K
% of Event Revenue sourced from outside Victoria	19.7%
Event Operations Impact	\$1,938K

Event Operations Impact on Australia

Event Related Expenditure incurred within Australia	\$10,332K
% of Event Revenue sourced from outside Australia	10.6%
Event Operations Impact	\$1,095K

5.2 The Economic Impact to the State of Victoria

The table below indicates the likely increase in Victoria's Gross State Product (GSP) and State taxes as a result of the Games being staged in Victoria. The multipliers used to determine the total economic impact have been sourced from the National Institute of Economic and Industry Research (NIEIR).

	Multiplier *	Total (\$000)
Visitor Expenditure	n/a	\$27,640
Event Operations Impact	n/a	\$1,938
Total Increase in Direct Expenditure	n/a	\$29,578
Increase in Gross State Product	1.88	\$55,607
Increase in State Taxation	0.11	\$3,254

As indicated by the above table, the increase in direct expenditure by visitors of \$27.6 million, and event operations impact of \$1.9 million, gives rise to increases in Gross State Product of \$55.6 million and increases in State taxation revenue of \$3.3 million.



5.3 The Economic Impact to Australia

The table below indicates the likely increase in Australia’s Gross Domestic Product (GDP) and Commonwealth taxes as a result of the Games being staged in Victoria. The multipliers used to determine the total economic impact have been sourced from the National Institute of Economic and Industry Research (NIEIR).

	Multiplier *	Total (\$000)
Visitor Expenditure	n/a	\$22,385
Event Operations Impact	n/a	\$1,095
Total Increase in Direct Expenditure	n/a	\$23,480
Increase in Gross Domestic Product	2.94	\$69,031
Increase in Commonwealth Taxation	0.27	\$6,340

As indicated by the above table, the increase in direct expenditure by visitors of \$22.4 million, and event operations impact of \$1.1 million, gives rise to increases in GDP of \$69 million and increases in Commonwealth taxation revenue of \$6.3 million.



6. Ancillary Survey Questions

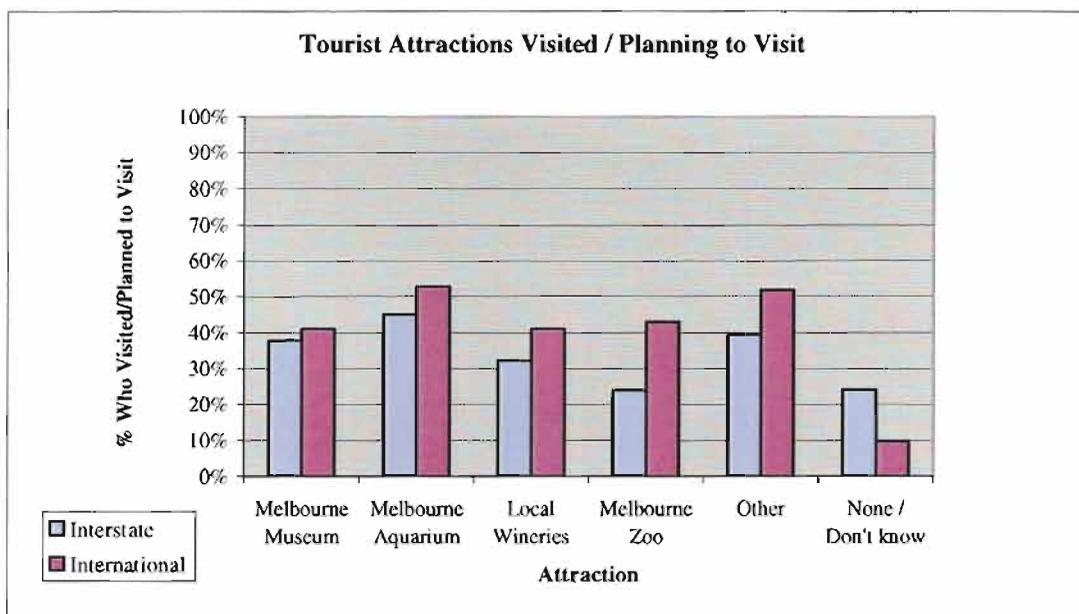
To develop a greater understanding of the demographics of the interstate and international competitors, the surveys conducted by Newspoll also included a number of qualitative questions. Each of these questions and the results obtained are discussed in this section of the report, and are based on the responses obtained from 340 interstate and 340 international competitors.

6.1 Tourist Attractions

M2002 wanted to determine what else the competitors were doing during their stay in Victoria. As Victoria has large number of quality tourist attractions. M2002 were keen to know whether interstate and international competitors were visiting some of these attractions. Competitors were asked “which of the following Victorian tourist attractions, if any, have you visited or are you planning to visit during your trip”. The survey listed to following attractions:

- Melbourne Museum
- Melbourne Aquarium
- Any local wineries
- Melbourne Zoo
- Any other attractions in other parts of Victoria

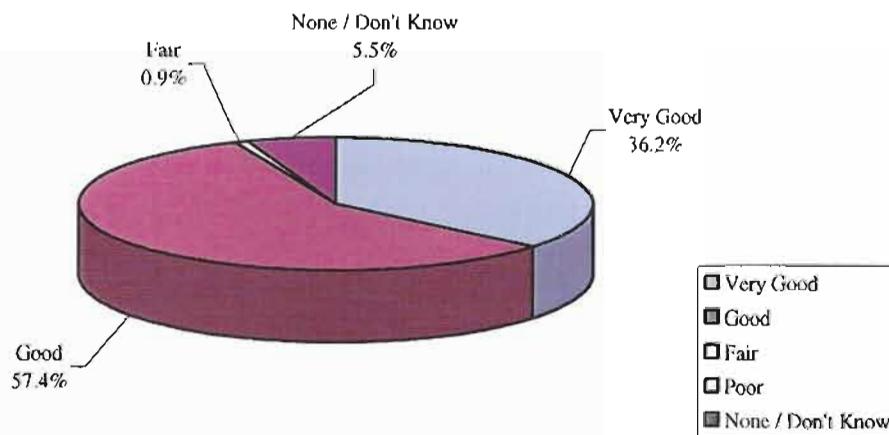
The graph below shows the percentage of respondents who indicated they visited or planned to visit the above-mentioned attractions.



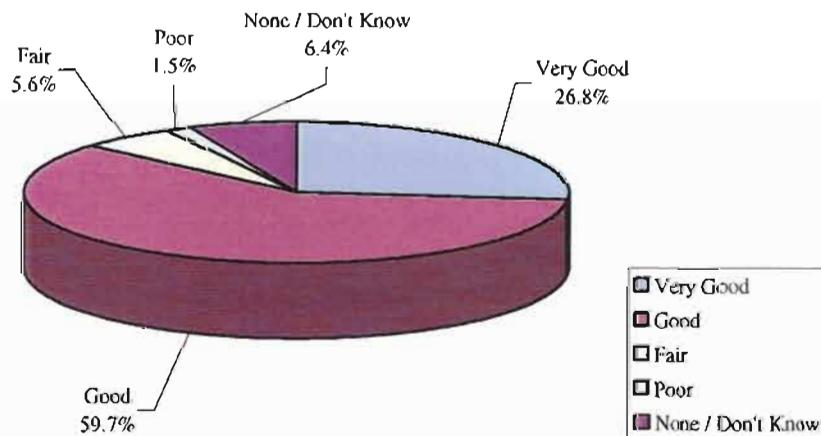
6.2 Melbourne as a Tourist Destination

Competitors were also asked how they would personally rate Melbourne as a tourist destination, that is, very good, good, fair, poor or don't know. The results indicated that a total of 86.5% of interstate competitors and 93.5% of international competitors rated Melbourne as either very good or good as a tourist destination.

International Competitors Rating of Melbourne as a Tourist Destination



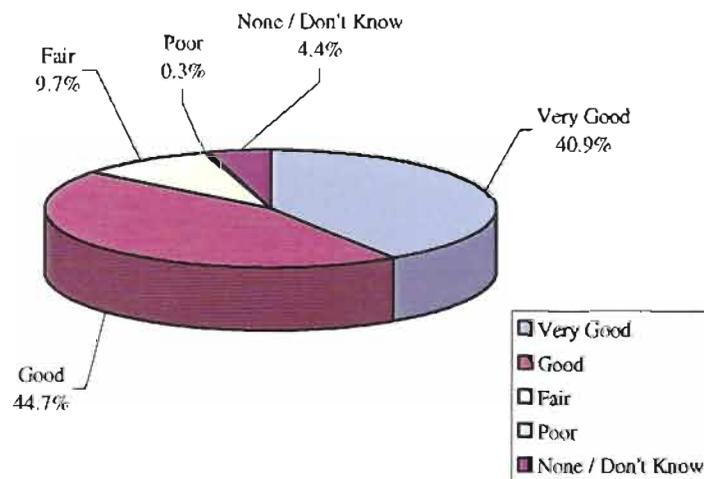
Interstate Competitors Rating of Melbourne as a Tourist Destination



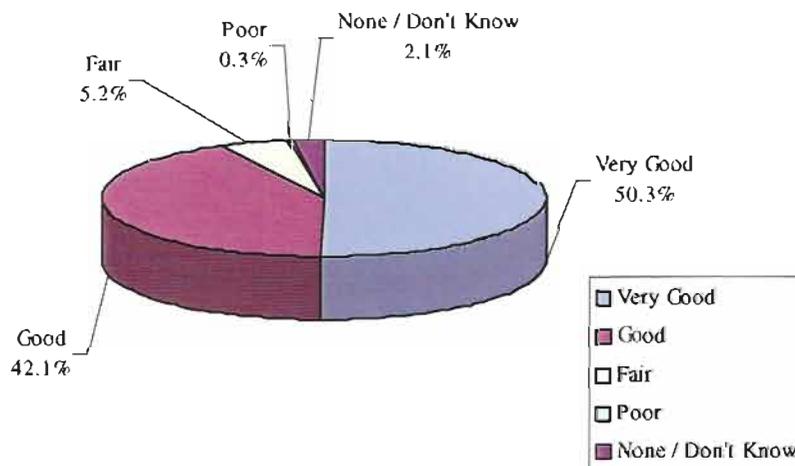
6.3 Melbourne's Facilities

The final qualitative question included in the competitor survey related to Melbourne's facilities. Competitors were asked how they would "generally rate Melbourne's facilities such as public transport, the airport, customs and other services". A rating scale of very good, good fair or poor was again used.

Interstate Competitors Rating of Melbournes Facilities



International Competitors Rating of Melbournes Facilities





7. Other Benefits

Induced Tourism

Our estimate of the economic impact to Victoria and Australia, as discussed in section 5 of this report, does not consider the effect of induced tourism. Induced tourism refers to the return visitations to Victoria or Australia by competitors in the future. The results of the competitors' survey indicate that the overall attractiveness of Australia and Victoria as a tourist destination has been enhanced as a result of Melbourne hosting the Games. These results indicated that a total of 86.5% of interstate competitors and 93.5% of international competitors surveyed rated Melbourne as either very good or good as a tourist destination (refer section 6 of this report for detailed results).

The Games Held in Alternative Location

If the Games had not been held in Melbourne, people from Victoria may have travelled either overseas or interstate to attend the Games. Given that a total of 11,168 Victorians competed in the games the potential for travel outside the state by Victorian residents may have been significant had the Games been stage elsewhere.

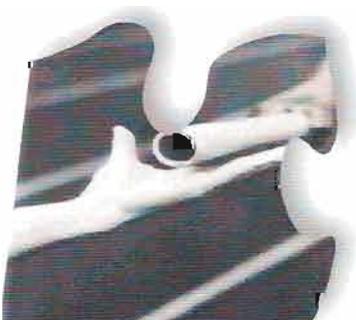
By holding the Games in Melbourne, this outward flow is negated and the overall impact of the Games to Victoria and Australia is enhanced.

World Masters Games Legacies

As identified in the preceding section, the Games will generate significant quantifiable economic benefits for Victoria and Australia. However other benefits, which are more difficult to quantify, are also likely to be derived. M2002 have provided us with a number of benefits, which they believe will create a lasting legacy of the Games. These include:

- Quality staff trained in a large multi-sport event.
- Experienced Directors experienced in multi-sport events.
- Skills acquired by State Sports Associations to run large events.
- Masters Sport and World Masters Games Brand Recognition.
- Better understanding in Victoria of the concept of Masters sport.
- Involvement of Regional and outer suburban areas in such a large event.

- Sponsorship awareness and recognition, and the introduction of new sponsors to sport.
- Media exposure prior to the Games and during the Games.
- Volunteers – a co-ordinated approach. recruitment, training, recognition model.
- Officials - exposure to international competition.
- The benefits for small to medium size venues, i.e. Geelong Baseball Facility, State Netball & Hockey Centre, Wellsford Rifle Range, in hosting international large-scale events.
- Sub-Committees – Police & Emergency Services, Transport, Medicine
- Documentation and models to run a multi-sport event including:
 - Risk Management document
 - Transport & Coordination Plans
 - Manuals that have been put together
 - Accreditation Plans
 - Business Plans
 - Financial Plans
 - Volunteer Plans
- Mentoring through speaking engagements to:
 - Schools
 - Corporates
 - Rotary etc
- Showing that “Sport is for Life”





8. Disclaimer

Ernst & Young have prepared this economic impact assessment in conjunction with, and relying on information provided by those parties disclosed in section 2.1 of this report. We do not imply, and it should not be construed that we have performed audit or due diligence procedures on any of the information provided to us.

Ernst & Young make no representations as to the accuracy or completeness of this information. In these circumstances neither Ernst & Young nor their respective employees accepts responsibility arising in any way whatsoever for errors or omissions however caused.

We acknowledge that the M2002 will be included in the M2002 final report, which will be distributed to State Government, sponsors and the International Masters Games Association. However the report should not be provided to any other person without the consent of Ernst & Young.



Appendix One

Competitor Questionnaires

- Interstate
- Overseas

Edited: _____
Validated: _____

NEWSPOLL

Terminations:	
Refusals:	

2002 WORLD MASTERS GAMES SURVEY

NEWSPOLL JOB NO. 021011
To be fielded no later than
Sunday, 6 October 2002

QUESTIONNAIRE NO: _____

INTERVIEWER NAME: _____

Interview Start Time: ____ / ____

AREA _____ AT WORLD TRADE CENTRE..... 1

INTRODUCTION AND SCREENING:

Good morning / afternoon. My name is... (NAME). I am conducting a survey, on behalf of Newspoll, amongst interstate and international competitors at the World Masters Games.

- Q1 If you're willing to take part in this survey, could you please tell me, if you are...? **READ OUT 1-3**
- | | | |
|------------------------------------|-----------|-----------------------|
| | <u>SR</u> | |
| A COMPETITOR FROM VICTORIA..... | 1 | @ TERMINATE |
| A COMPETITOR FROM INTERSTATE..... | 2 | * GREEN QUESTIONNAIRE |
| OR, A COMPETITOR FROM OVERSEAS.... | 3 | # BLUE QUESTIONNAIRE |
| NOT A COMPETITOR / REFUSED..... | 4 | @ TERMINATE |

INTERSTATE

ASK IF COMPETITOR FROM INTERSTATE IE CODE 2 IN Q1. CODE 3 GO TO BLUE QUESTIONNAIRE. CODE 1, 4 TERMINATE WITH THANKS

- Q2 This survey is being conducted to assess the economic impact of the World Masters Games on Victoria. Before we start ... (PAUSE) I just need to inform you that the information you provide will be used only for research purposes. The survey will take between four and five minutes depending on your answers.
- | | | |
|-----------------|---|------|
| YES..... | 1 | * Q3 |
| NO..... | 2 | # # |
| DON'T KNOW..... | 3 | # Q4 |

Did you come to Melbourne mainly for the 2002 World Masters Games?

ASK IF CAME TO MELBOURNE MAINLY FOR GAMES IE CODE 1 IN Q2. CODE 2-3 GO TO Q4

- Q3 How many nights, in total, are you spending in Victoria during this trip?
- | | | |
|------------------------|-------|---------|
| NIGHTS..... | _____ | * Q5(a) |
| NONE / DON'T KNOW..... | 00 | * * |
- RECORD AS A TWO DIGIT NUMBER BESIDE "NIGHTS". IF A RANGE GIVEN, EG 3 OR 4, CHECK "IS IT MORE LIKELY TO BE THREE OR FOUR NIGHTS?" IF A RANGE STILL GIVEN RECORD LOWER NUMBER

ASK IF DID NOT COME TO MELBOURNE MAINLY FOR GAMES IE CODE 2-3 IN Q2. CODE 1 IN Q2 GO TO Q5(a)

- Q4 Are you spending any extra nights in Victoria because of the World Masters Games?
- | | | | |
|-----|------------------------|-------|-------------|
| YES | NIGHTS..... | _____ | * Q5(b) |
| | NONE / DON'T KNOW..... | 00 | # # |
| | NO / DON'T KNOW..... | 99 | # TERMINATE |
- IF YES How many extra nights will you be spending in Victoria because of the World Masters Games?
- RECORD AS A TWO DIGIT NUMBER BESIDE "NIGHTS". IF A RANGE GIVEN, EG 3 OR 4, CHECK "IS IT MORE LIKELY TO BE THREE OR FOUR NIGHTS?" IF A RANGE STILL GIVEN RECORD LOWER NUMBER

Q5(a) ASK IF CAME TO MELBOURNE MAINLY FOR GAMES IE CODE 1 IN Q2. CODE 2-3 IN Q2 GO TO Q5(b)

And now a couple of questions about the amount of money you yourself will spend on various items during the time you are in Victoria. As I read out different items of expenditure please say how much money, if any, you personally will spend on each item, for both **yourself** and **other people**, during your time in **Victoria**

Taking account of **all** the money you personally will spend, including cash, credit card, etpos, cheque or travellers cheques, how much money will you spend on...? **READ OUT A - C**

PROBE FOR BEST ESTIMATE TO NEAREST WHOLE \$1. RECORD AS A RIGHT JUSTIFIED FOUR DIGIT NUMBER EG \$50 AS 0050 FOR EACH ITEM OF EXPENDITURE. IF A RANGE GIVEN CHECK FOR EXACT AMOUNT. IF A RANGE STILL GIVEN RECORD LOWER NUMBER

Q5(b) ASK IF STAYING EXTRA NIGHTS IN VICTORIA IE CODE 01-98 IN Q4. OTHERS GO TO Q6

And now a couple of questions about the amount of money you yourself will spend on various items. Please think just about what you will spend during the **extra** time you said you are spending in Victoria because of the 2002 World Masters Games. As I read out different items of expenditure please say how much money, if any, you will spend on each item, for both **yourself** and **other people**, during the **extra** time you are in **Victoria**.

Taking account of **all** the money you personally will spend, including cash, credit card, etpos, cheque or travellers cheques, how much money will you spend on...? **READ OUT A - C**

PROBE FOR BEST ESTIMATE TO NEAREST WHOLE \$1. RECORD AS A RIGHT JUSTIFIED FOUR DIGIT NUMBER EG \$50 AS 0050 FOR EACH ITEM OF EXPENDITURE. IF A RANGE GIVEN CHECK FOR EXACT AMOUNT. IF A RANGE STILL GIVEN RECORD LOWER NUMBER

- A) ACCOMMODATION, INCLUDING ANY MEALS AND DRINKS AT THAT ACCOMMODATION. PLEASE INCLUDE ANY AMOUNTS PREPAID AS PART OF A PACKAGE A\$ _____ , _____ .
 NONE0000
 DON'T KNOW.....9999
- B) ANY OTHER MEALS, FOOD AND DRINKS, OR OTHER ENTERTAINMENT COSTS, SUCH AS THE MOVIES AND TOURIST ATTRACTIONS LIKE ART GALLERIES OR MUSEUMS A\$ _____ , _____ .
 NONE0000
 DON'T KNOW.....9999
- C) ANY OTHER EXPENSES AT ALL A\$ _____ , _____ .
 NONE0000
 DON'T KNOW.....9999

Q6 ASK IF CAME TO MELBOURNE MAINLY FOR GAMES OR STAYING EXTRA NIGHTS IN VICTORIA IE CODE 1 IN Q2 OR CODE 01-98 IN Q4. OTHERS TERMINATE WITH THANKS

Including yourself, how many people do these amounts of money cover?

**RECORD AS A RIGHT JUSTIFIED TWO DIGIT NUMBER BESIDE "PEOPLE" EG 3 PEOPLE
 PEOPLE AS 03 DON'T KNOW.....00**

- Q7 Of those ... (SAY NUMBER IN Q6) people, how many are not competing or are not officially registered as an accompanying person? **RECORD AS A RIGHT JUSTIFIED TWO DIGIT NUMBER BESIDE "PEOPLE" EG 3 PEOPLE AS 03** PEOPLE
 DON'T KNOW.....00

- Q8 Which of the following Victorian tourist attractions, if any, have you visited or are you planning to visit during your trip...? **READ OUT 1-5 AND ROTATE 1-4**
- | | |
|--|-----------|
| | <u>MR</u> |
| THE MELBOURNE MUSEUM | 1 |
| THE MELBOURNE AQUARIUM..... | 2 |
| ANY LOCAL WINERIES | 3 |
| THE MELBOURNE ZOO | 4 |
| ANY ATTRACTIONS
IN OTHER PARTS OF VICTORIA..... | 5 |
| NONE / DON'T KNOW | 6 |

Q9 Now, about Melbourne generally as a tourist destination. How would you personally rate Melbourne as a tourist destination? Would you say it is...? **READ OUT 1-4**

VERY GOOD 1
 GOOD 2
 FAIR 3
 OR, POOR 4
 NONE / DON'T KNOW 5

Q10 And would you generally rate Melbourne's facilities such as public transport, the airport and other services as...? **READ OUT 1-4**

VERY GOOD 1
 GOOD 2
 FAIR 3
 OR, POOR 4
 NONE / DON'T KNOW 5

END

Thank you for your time. Just to remind you my name is ... **(NAME)**. If you have any questions about this research you can telephone our office on the number shown on the card. **OFFER MRSA CARD**

RECORD FINISH TIME _____

CALCULATE TOTAL LENGTH OF INTERVIEW & RECORD IN MINUTES _____

I certify that this is a true, accurate and complete interview, conducted in accordance with the ICC/ESOMAR International Code, and I will not disclose to any other person the content of this questionnaire or any other information relating to this project.

INTERVIEWER'S SIGNATURE: _____

DATE: _____

INTERVIEWER'S NO: _____

Edited: _____
Validated: _____

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NEWSPOLL

Terminations:	
Refusals:	

2002 WORLD MASTERS GAMES SURVEY

NEWSPOLL JOB NO. 021011
To be fielded no later than
Sunday, 6 October 2002

QUESTIONNAIRE NO: _____

INTERVIEWER NAME: _____

Interview Start Time: ____ / ____

AREA  AT WORLD TRADE CENTRE..... 1

INTRODUCTION AND SCREENING:

Good morning / afternoon. My name is... (NAME). I am conducting a survey, on behalf of Newspoll, amongst interstate and international competitors at the World Masters Games.

- Q1 If you're willing to take part in this survey, could you please tell me, if you are...? READ OUT 1-3
- | | | |
|------------------------------------|-----------|-----------------------|
| | <u>SR</u> | |
| A COMPETITOR FROM VICTORIA..... | 1 | @ TERMINATE |
| A COMPETITOR FROM INTERSTATE..... | 2 | * GREEN QUESTIONNAIRE |
| OR, A COMPETITOR FROM OVERSEAS.... | 3 | # BLUE QUESTIONNAIRE |
| NOT A COMPETITOR / REFUSED..... | 4 | @ TERMINATE |

OVERSEAS

ASK IF COMPETITOR FROM OVERSEAS IE CODE 3 IN Q1. CODE 2 GO TO GREEN QUESTIONNAIRE. CODE 1, 4 TERMINATE WITH THANKS

- Q2 This survey is being conducted to assess the economic impact of the World Masters Games on Victoria and Australia. Before we start ... (PAUSE) I just need to inform you that the information you provide will be used only for research purposes. The survey will take between four and five minutes depending on your answers.
- | | | |
|-----------------|---|---------|
| YES | 1 | * Q3(a) |
| NO | 2 | # # |
| DON'T KNOW..... | 3 | # Q4 |

Did you come to Australia mainly for the 2002 World Masters Games?

ASK IF CAME TO AUSTRALIA MAINLY FOR GAMES IE CODE 1 IN Q2. CODE 2-3 GO TO Q4

- Q3(a) How many nights, in total, are you spending in Victoria during this trip?
- NIGHTS..... _____
- RECORD AS A TWO DIGIT NUMBER BESIDE "NIGHTS". IF A RANGE GIVEN, EG 3 OR 4, CHECK "IS IT MORE LIKELY TO BE THREE OR FOUR NIGHTS?" IF A RANGE STILL GIVEN RECORD LOWER NUMBER
- NONE / DON'T KNOW.....00

- Q3(b) And how many nights, in addition to your nights in Victoria, are you expecting to spend in other parts of Australia during this trip?
- NIGHTS..... _____ * Q5(a)
- RECORD AS A TWO DIGIT NUMBER BESIDE "NIGHTS". IF A RANGE GIVEN, EG 3 OR 4, CHECK "IS IT MORE LIKELY TO BE THREE OR FOUR NIGHTS?" IF A RANGE STILL GIVEN RECORD LOWER NUMBER
- NONE / DON'T KNOW.....00 * *

ASK IF DID NOT COME TO AUSTRALIA MAINLY FOR GAMES IE CODE 2-3 IN Q2. CODE 1 IN Q2 GO TO Q5(a)

- Q4 Are you spending any extra nights in Victoria because of the World Masters Games? YES
 NIGHTS _____ * Q5(b)
 NONE / DON'T KNOW.....00 # #
 IF YES How many extra nights will you be spending in Victoria because of the World Masters Games? NO / DON'T KNOW99 # TERMINATE

RECORD AS A TWO DIGIT NUMBER BESIDE "NIGHTS".
 IF A RANGE GIVEN, EG 3 OR 4, CHECK "IS IT MORE LIKELY TO BE THREE OR FOUR NIGHTS?" IF A RANGE STILL GIVEN RECORD LOWER NUMBER

Q5(a) ASK IF CAME TO AUSTRALIA MAINLY FOR GAMES IE CODE 1 IN Q2. CODE 2-3 IN Q2 GO TO Q5(b)

And now a couple of questions about the amount of money you yourself will spend on various items during the time you are in Australia. As I read out different items of expenditure please say how much money, if any, you personally will spend on each item, for both yourself and other people, during your time in Australia.

Taking account of all the money, in Australian dollars, you personally will spend, including cash, credit card, eftpos, cheque or travellers cheques, how much money will you spend on...? READ OUT A - C
 PROBE FOR BEST ESTIMATE TO NEAREST WHOLE \$1. RECORD AS A RIGHT JUSTIFIED FOUR DIGIT NUMBER EG \$50 AS 0050 FOR EACH ITEM OF EXPENDITURE. IF A RANGE GIVEN CHECK FOR EXACT AMOUNT. IF A RANGE STILL GIVEN RECORD LOWER NUMBER

Q5(b) ASK IF STAYING EXTRA NIGHTS IN VICTORIA IE CODE 01-98 IN Q4. OTHERS GO TO Q6

And now a couple of questions about the amount of money you yourself will spend on various items. Please think just about what you will spend during the extra time you said you are spending in Victoria because of the 2002 World Masters Games. As I read out different items of expenditure please say how much money, if any, you will spend on each item, for both yourself and other people, during the extra time you are in Victoria.

Taking account of all the money, in Australian dollars, you personally will spend, including cash, credit card, eftpos, cheque or travellers cheques, how much money will you spend on...? READ OUT A - C
 PROBE FOR BEST ESTIMATE TO NEAREST WHOLE \$1. RECORD AS A RIGHT JUSTIFIED FOUR DIGIT NUMBER EG \$50 AS 0050 FOR EACH ITEM OF EXPENDITURE. IF A RANGE GIVEN CHECK FOR EXACT AMOUNT. IF A RANGE STILL GIVEN RECORD LOWER NUMBER

- A) ACCOMMODATION, INCLUDING ANY MEALS AND DRINKS AT THAT ACCOMMODATION. PLEASE INCLUDE ANY AMOUNTS PREPAID AS PART OF A PACKAGE A\$ _____ , _____
 NONE0000
 DON'T KNOW.....9999
- B) ANY OTHER MEALS, FOOD AND DRINKS, OR OTHER ENTERTAINMENT COSTS, SUCH AS THE MOVIES AND TOURIST ATTRACTIONS LIKE ART GALLERIES OR MUSEUMS..... A\$ _____ , _____
 NONE0000
 DON'T KNOW.....9999
- C) ANY OTHER EXPENSES AT ALL EXCLUDING YOUR TRAVEL TO AND FROM AUSTRALIA..... A\$ _____ , _____
 NONE0000
 DON'T KNOW.....9999
- Q6 ASK IF CAME TO AUSTRALIA MAINLY FOR GAMES OR STAYING EXTRA NIGHTS IN VICTORIA IE CODE 1 IN Q2 OR CODE 01-98 IN Q4. OTHERS TERMINATE WITH THANKS
- Including yourself, how many people do these amounts of money cover?
 RECORD AS A RIGHT JUSTIFIED TWO DIGIT NUMBER BESIDE "PEOPLE" EG 3 PEOPLE
 PEOPLE AS 03 DON'T KNOW.....00
- Q7 Of those ... (SAY NUMBER IN Q6) people, how many are not competing or are not officially registered as an accompanying person? RECORD AS A RIGHT JUSTIFIED TWO DIGIT NUMBER BESIDE "PEOPLE" EG 3 PEOPLE AS 03 PEOPLE
 DON'T KNOW.....00

Q8 Which of the following Victorian tourist attractions, if any, have you visited or are you planning to visit during your trip...?
READ OUT 1-5 AND ROTATE 1-4

MR

THE MELBOURNE MUSEUM1
 THE MELBOURNE AQUARIUM.....2
 ANY LOCAL WINERIES3
 THE MELBOURNE ZOO4
 ANY ATTRACTIONS
 IN OTHER PARTS OF VICTORIA.....5
 NONE / DON'T KNOW6

Q9 Now, about Melbourne generally as a tourist destination. How would you personally rate Melbourne as a tourist destination? Would you say it is...? **READ OUT 1-4**

VERY GOOD1
 GOOD.....2
 FAIR.....3
 OR, POOR.....4
 NONE / DON'T KNOW.....5

Q10 And would you generally rate Melbourne's facilities such as public transport, the airport, customs and other services as...? **READ OUT 1-4**

VERY GOOD1
 GOOD.....2
 FAIR.....3
 OR, POOR.....4
 NONE / DON'T KNOW.....5

END

Thank you for your time. Just to remind you my name is ... (NAME). If you have any questions about this research you can telephone our office on the number shown on the card. **OFFER MRSA CARD**

RECORD FINISH TIME _____

CALCULATE TOTAL LENGTH OF INTERVIEW & RECORD IN MINUTES _____

I certify that this is a true, accurate and complete interview, conducted in accordance with the ICC/ESOMAR International Code, and I will not disclose to any other person the content of this questionnaire or any other information relating to this project.

INTERVIEWER'S SIGNATURE: _____

DATE: _____

INTERVIEWER'S NO: _____