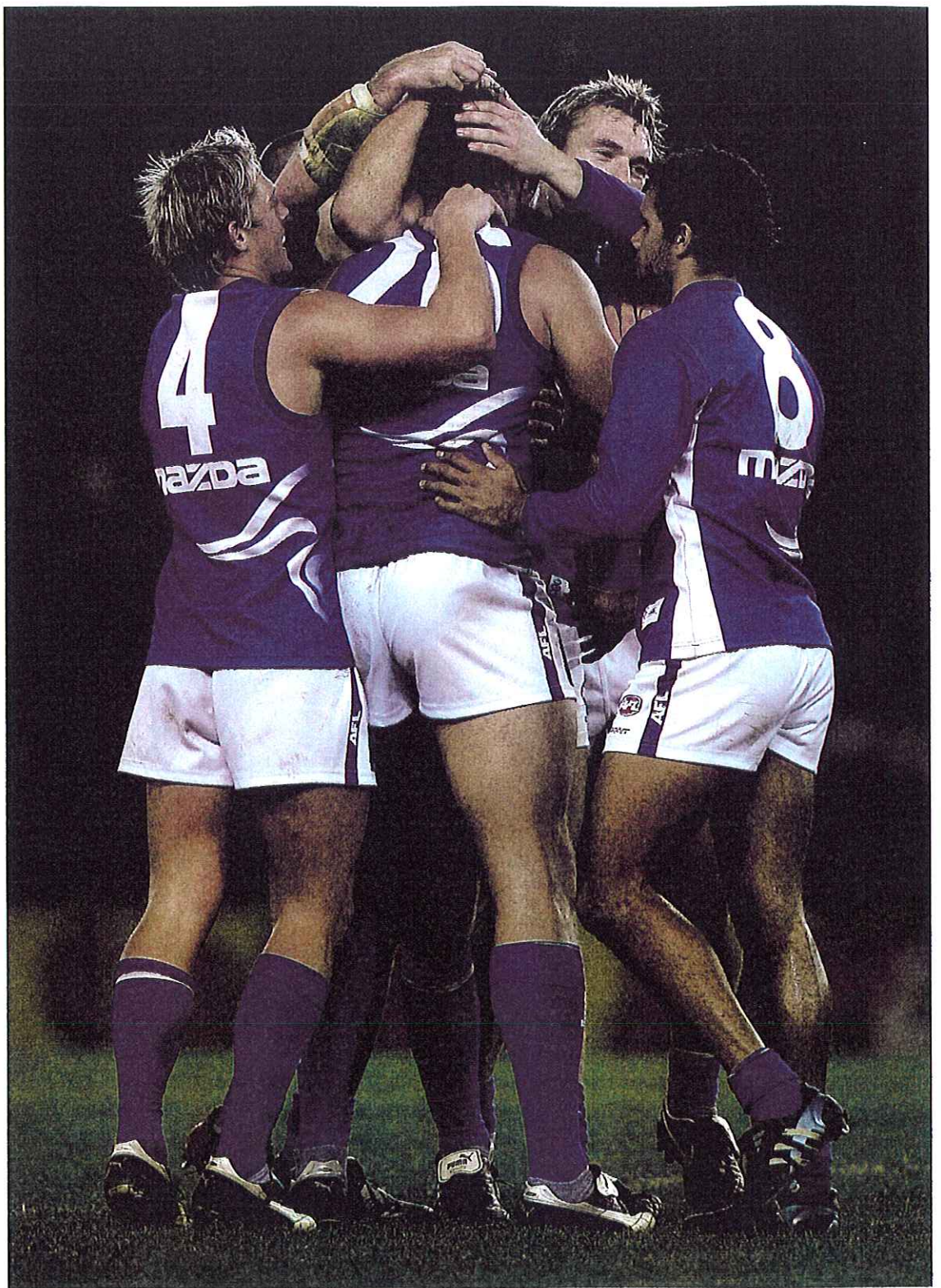




2005 Kangaroos/AFL Report to ACT Government

Executive Summary

The AFL Match Day Surveys were commissioned by the AFL and were undertaken at two AFL matches at Manuka Oval, Canberra on the 2nd April 2005 (North Melbourne Football Club and Sydney Swans) and 20th June 2004 (North Melbourne Football Club and West Coast Eagles).

The results of the 2004 study have already been reported, however, the 2004 results (shown in brackets throughout the body of the report) have been used as a basis for comparison with the 2005 results.

The objectives of the surveys were to determine the attendance characteristics of spectators and their opinions of the Manuka Oval facility and service provided. A second objective was to use the data collected to assess the economic impact of the AFL game to the ACT.

Three hundred and twelve interviews were conducted in 2005 – a slight increase over the sample of 293 for the 2004 study. The same 12-question instrument was used for both studies.

Key results indicate:

- that one third of the sample came from interstate and 58% of these visitors intended staying more than one day in the ACT. These results were almost identical for both studies.
- The two most preferred modes of transport when travelling to Canberra were car or plane.
- The most common 'other' activities recorded for both studies were 'dining out' or 'visiting a pub/club'.
- One quarter of all spectators attending the games in 2005 and 2004, did so on their own, although there were a higher percentage of larger groups in the 2004 study.
- The percentage of spectators from the ACT and surrounds was considerably higher in 2005 (57%) than for 2004 (36%).
- Spectators from the Riverina and Central Coast doubled in 2005 which suggests the development programs and advertising campaigns conducted in these regions were valuable in promoting the game and the Kangaroos.
- The most positive impressions of Manuka Oval were 'viewing the match', 'cleanliness of the stadium', 'ease of getting to the oval' and 'buying a ticket'.
- Aspects of Manuka Oval considered less than good were the 'number of undercover seats', 'price of food and beverage' and 'car parking availability and access'.
- Family and friends and TV advertising were the most common means of finding out about the matches.
- Forty-five percent of the supporters at the 2005 game were Swans supporters (the largest percentage).

- The largest group of spectators were in the age bracket 20-29, this is similar to 2004. Forty-two percent of the 2005 sample were women, a 7% increase over the 2004 game.
- Gross annual income of the sample was more widely spread in 2005.
- Of note was that in both 2005 and 2004, 40% of spectators were at their first AFL game.

The Cost Benefit Analysis highlights the significant contribution the Kangaroos are making to the Canberra community. The research indicates they have the ability to attract significant crowd numbers and will continue to do so with the right marketing and promotional strategies in place.

Clearly, games against the Sydney Swans provide the greatest opportunity for the Kangaroos to sell out Manuka Oval and maximise their ability to attract interstate visitors to Canberra. The overall profit of \$122,078 for 2005 is an improvement of 37% on 2004 figures and does not take into account the impact of the Kangaroos on the community through their development and networking programs.

Recommendations focus on attracting and maintaining first time spectators, developing ticket packages that will attract interstate visitors, and the collection of more demographic information to assist the accuracy and relevance of future surveys and economic impact studies.