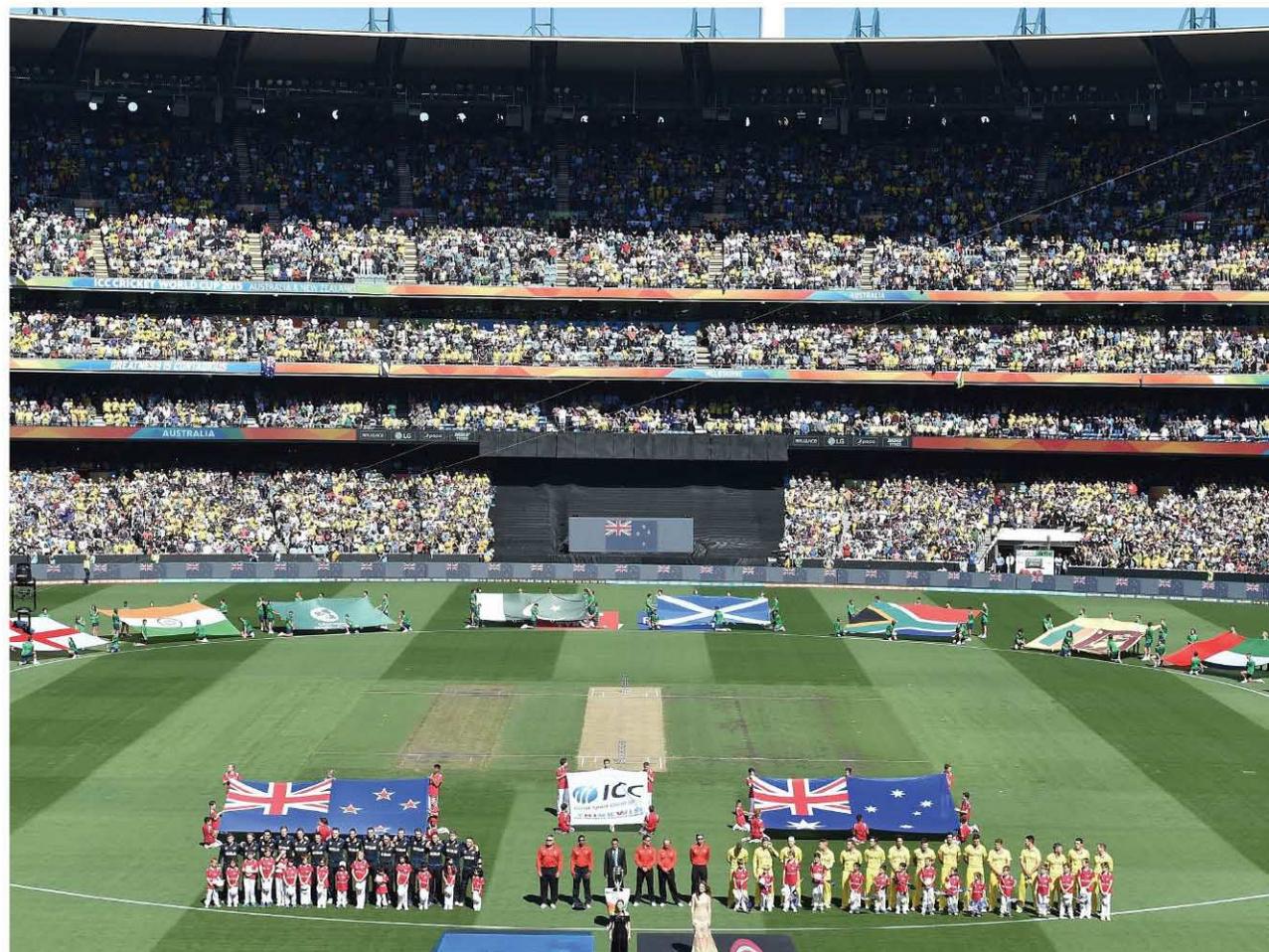


June 2015

# Cricket World Cup 2015 Ltd

Economic impact and benefits analysis of the ICC Cricket World Cup 2015

*Final report*



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# Executive summary

1



# Executive summary

The International Cricket Council (ICC) Cricket World Cup 2015 (CWC 2015), the pinnacle of international one day cricket, was jointly hosted by Australia and New Zealand during February and March 2015. This is only the second time these two nations have hosted the event, the last being the ICC Cricket World Cup 1992, 23 years ago.

The Tournament's 49 matches were played over 44 days across 14 host cities. This served as a major catalyst for collaboration between the trans-Tasman neighbours towards a common goal and generating a sense of national pride felt by all attendees. The Tournament was attended by over one million, and watched by over 1.56 billion people worldwide. On 29 March 2015, it culminated in a final between the two host nations at the Melbourne Cricket Ground (MCG) that attracted a record breaking attendance of 93,013.

In order to analyse the economic impact and benefits of the Tournament, PwC collected Tournament-specific expenditure data from the local organising committee, host cities and through online and face-to-face surveys of attendees. These expenditures were then modelled using economy-wide modelling to assess the flow-on and total economic impacts of the event.

## Breaking records

The ICC CWC 2015 final had the highest attendance ever officially recorded for a single day of cricket anywhere in the world (93,013).<sup>1</sup> It also broke the television record for the most watched cricket match in Australia, peaking at 4.2 million viewers nationally, supplemented by almost two million in New Zealand.<sup>2</sup> Every match in which the New Zealand Black Caps played was sold out. The India versus Pakistan match in Adelaide was the most talked about match in digital history.<sup>3</sup>

## Most popular ICC CWC ever

The ICC CWC 2015 hosted nearly 1.2 million Tournament attendees, of which nearly one quarter were from overseas.<sup>4</sup> It also reached a dedicated television audience of 1.56 billion, with a potential viewership of 2.51 billion worldwide.<sup>5</sup> The Tournament received 57.5 billion social media impressions, 1.4 billion live views of tweets and 17.3 million cumulative Facebook Likes across the Tournament. In addition, there were 35.9 million unique visitors to the Tournament website.<sup>6</sup>

## Beneficial to the economy

In total, AU\$1.10b/NZ\$1.15b was directly spent as a result of the ICC CWC 2015, generating a positive contribution to the Australian and New Zealand economies. The Tournament triggered an increase in gross domestic product (GDP) across both Australia and New Zealand of AU\$460m/NZ\$480m, creating 8,320 full-time equivalent jobs across the two countries.<sup>7</sup>

## Attracting foreign investment

A structure unique to ICC events, the ICC and its international partners and suppliers contribute significant foreign investment into the CWC host nations in delivering the Tournament. This is a point of difference when compared to other international sporting events, such as the Olympic Games, Rugby World Cup and the Asian Cup, where host nations must self-fund a significant portion of their events. This allowed Australia and New Zealand to benefit from capital inflows and lowered the level of upfront investment that would otherwise be required to host an event of the magnitude of the ICC CWC.

## Promoting inbound tourism

Approximately 595,000 unique visitors (including home-state/home-region) attended the ICC CWC 2015, staying an estimated total of two million bed nights. Of this, an estimated 145,000 were unique international visitors and 150,000 were unique interstate/inter-region visitors, staying an estimated 1.1 million and 0.5 million bed nights respectively across Australia and New Zealand.<sup>8</sup> A joint tourism visa was created to encourage attendees to visit both countries. The Tournament coincided with several local festivals and events and provided a platform for host cities to promote themselves as destinations for future international sporting events.

## Positive lasting community benefits

The Tournament incorporated a strong focus on engagement with multicultural communities, exemplified by the fact that eight of the 20 sold out matches did not involve either of the host nations. Emphasis was also placed on the next generation, including programs run for local cricket clubs as well as over 3,890 schools taking part in bespoke education programs offered online. Approximately 3,550 volunteers were also engaged by the event.<sup>9</sup> The Tournament was the first major international event to be held in Christchurch since the devastating earthquakes of 2010 and 2011, with the Opening Event, Opening match and a further two pool matches giving the city and its people the opportunity to once again shine on the international stage.

<sup>1</sup> ESPN Cricinfo (2015), <http://stats.espncricinfo.com/ci/content/records/283309.html>, last viewed 20 May 2015

<sup>2</sup> Sinclair, Lara, Cricket World Cup breaks ratings records (Mar 30, 2015), *The Australian Business Review*

<sup>3</sup> International Cricket Council, *ICC Cricket World Cup 2015 – Digital Report*, p10

<sup>4</sup> PwC analysis based on PwC survey and ticketing data provided by Cricket World Cup 2015 Ltd

<sup>5</sup> SMG Insight, *ICC Cricket World Cup 2015 – Sponsor 1 Partner Media Evaluation*, p7

<sup>6</sup> Doshi, Saurabh, Cricket World Cup 2015 on Facebook, *Facebook Media*, <http://media.fb.com/2015/03/30/cricket-world-cup-2015-on-facebook/>, last viewed 20 May 2015

<sup>7</sup> PwC analysis based on PwC survey and ticketing data provided by Cricket World Cup 2015 Ltd

<sup>8</sup> Ibid

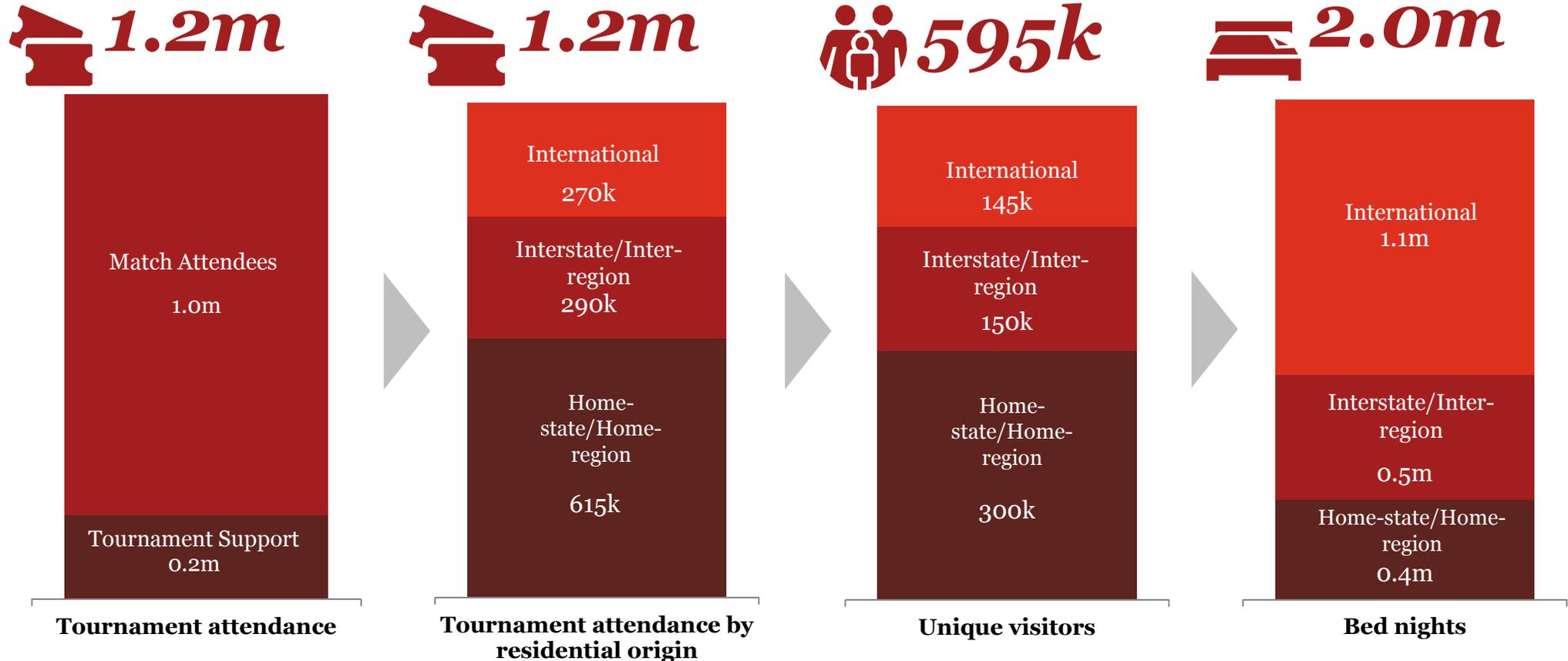
<sup>9</sup> Provided by Cricket World Cup 2015 Ltd

# Executive summary (cont'd)

## Australia and New Zealand - Visitation



**1.56 billion**  
television audience



Tournament attendance represents the aggregate match attendance (officially recorded attendees) and Tournament support attendees (personnel involved in the delivery of venues, matches and pre-Tournament events) to International Cricket Council Cricket World Cup 2015 matches and related events.

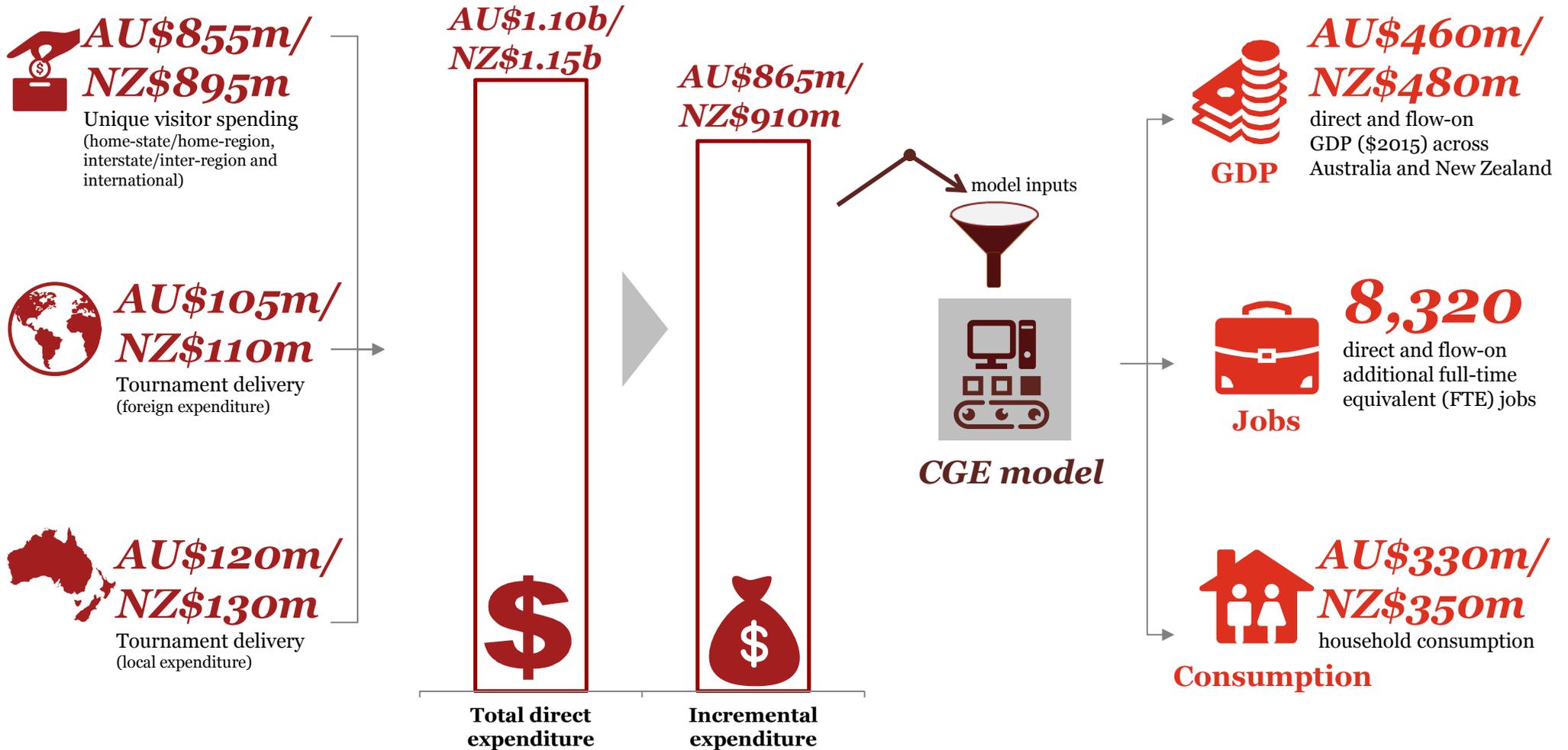
Tournament attendance can be analysed by residential origin (home-state/home-region, interstate/inter-region and international)

Unique visitors are the number of unique people visiting a state or region as a direct result of the Tournament, including those who attend matches within their home-state or home-region. Unique visitors represent a subset of Tournament attendance.

Bed nights represent the number of nights stayed by unique visitors in host cities as a direct result of the Tournament.

# Executive summary (cont'd)

## Australia and New Zealand – Expenditure and Total Impacts



Total direct expenditure represents the gross spending associated with the Tournament and is the total of visitor and Tournament spending. However, in order to estimate the total economic impact of hosting the Tournament, an understanding of the incremental expenditures are required. This is a subset of the total direct expenditures and represents the portion of spending that is induced by the Tournament, in our study approximately 90 per cent. In our analysis the incremental expenditures represent visitor and Tournament spending minus home-state/home-region spending as this can be argued would have been spent in the home-state/home-region anyway.

All figures are GST inclusive. Exchange rates represent the average of January to March in 2015, sourced from the Reserve Bank of Australia (1 AUD = 1.05 NZD). Dollar values have been rounded to the nearest \$5 million.

Source: PwC analysis based on PwC survey and ticketing data provided by Cricket World Cup 2015 Ltd

# Broader benefits



## Trade and tourism

- A joint tourism visa for Australia and New Zealand was implemented for the first time and streamlined visa and customs processes were put in place. These initiatives, together with the very extensive media exposure for both countries from the Tournament, will encourage future travel into the region.
- The Tournament provided businesses with a wide range of opportunities to showcase their abilities and host international investors.
- Both the Australian and New Zealand national governments and the Australian state governments were able to leverage ICC CWC 2015 in a number of high-level government and official meetings.



## Branding and Promotion

- The Tournament provided invaluable, global-scale marketing of Australia, New Zealand and the host cities through mainstream and digital media, diplomatic channels and the travel and tourism industries.
- Both countries' reputations as attractive destinations with major event hosting capability have been reinforced.



## Infrastructure

- ICC CWC 2015 gave impetus to several infrastructure redevelopment and improvement projects. It also provided a legacy of enhanced venues for future international tours.
- The Tournament provided a return on the historical investment in sporting infrastructure by successive governments, validating the decision to invest in these areas.
- The Tournament helped inspire the return of one-day international cricket to Christchurch with redevelopment of Hagley Oval. This provided the city and region with a new home for international cricket following the severe damage to the previous venue caused by the 2010 - 2011 Canterbury Earthquakes.



## Social responsibility

- Local and international charity partners benefited from a platform to raise awareness for their causes.
- The ICC, Cricket Australia, New Zealand Cricket and cricket fans contributed more than \$200,000 during ICC CWC 2015 to assist communities in Vanuatu affected by Cyclone Pam.



## Connections and engagement

- ICC CWC 2015 promoted widespread engagement and encouraged a diverse range of community groups to be involved with the sport's pinnacle event.
- Relationships between Cricket Australia and New Zealand Cricket, various community groups and other cricket stakeholders has been considerably strengthened.
- There were a range of initiatives that successfully promoted cricket to children and multicultural communities.
- The Tournament has given local industries further major event hosting experience.



## Relationships

- Extensive collaboration between the Australian and New Zealand governments has fostered even closer ties between the two countries at the highest level.
- Cricket Australia and New Zealand Cricket have established richer connections at all levels of government.
- ICC CWC 2015 was a celebration of diversity in harmony, successfully attracting the interest and participation of multicultural communities.



## Pride

- The successful hosting of the Tournament, the opportunity for the hosts to show off their countries, and the success of both national teams engendered a sense of camaraderie and pride at both a local and national level.
- The Tournament has reinvigorated one-day cricket as a format. In New Zealand in particular the Tournament generated a level of public interest in cricket not seen for many years.
- The Tournament put the city and people of Christchurch at the centre of positive international broadcast and media attention as the city hosted an opening event that attracted over 60,000 people to North Hagley Park to celebrate the tournament and re-emergence of the city.

# Introduction and background

2



# Introduction and background

## Introduction

The International Cricket Council (ICC) Cricket World Cup is one of the world's largest international sporting events and returned to Australia and New Zealand in 2015. It has been 23 years since the ICC Cricket World Cup was last hosted by these two nations, making it a once in a generation opportunity to participate in a celebration of cricket of this quality.

The ICC Cricket World Cup 2015's ('ICC CWC 2015' or 'Tournament') 49 matches were played over 44 days within 14 host cities (seven in Australia and seven in New Zealand). The total Tournament attendance exceeded one million people, with a dedicated television audience of over 1.56 billion.<sup>1</sup> Twenty of the 44 matches sold out, including every match involving New Zealand. Eight of the sold out matches did not involve either host nation, which highlighted the success of efforts to engage multicultural communities and international visitation. The Tournament was also preceded by 14 warm up matches, some of which were played at grounds that do not typically have the opportunity to host international cricket.<sup>2</sup>

## Purpose of report

Cricket World Cup 2015 Ltd, the local organising committee (LOC) for the CWC, as well as Cricket Australia and New Zealand Cricket, engaged PwC Australia with the support of PwC New Zealand to conduct an economic impact assessment of the Tournament on Australian and New Zealand economies. This report considers the direct and indirect (or flow-on) economic impacts and benefits of the event on:

- the Australian national economy
- the New Zealand national economy
- Australian state economies (Australian Capital Territory, New South Wales, Queensland, South Australia, Tasmania, Victoria and Western Australia)
- New Zealand regional economies (Auckland, Canterbury, Wellington and an aggregate of the remaining of the New Zealand host cities: Dunedin, Hamilton, Napier and Nelson).



**14**  
host cities



**14**  
match venues



**49**  
matches\*



**20**  
sold out matches



**1.2m**  
tournament  
attendance



**14**  
teams

\* This includes a rained out match between Australia and Bangladesh in Brisbane. Further, it does not include 14 warm-up matches played across Australia and New Zealand that preceded the Tournament. Source: International Cricket Council, <http://www.icc-cricket.com/cricket-world-cup>, last viewed 20 May 2015

<sup>1</sup> SMG Insight, *ICC Cricket World Cup 2015 – Sponsor 1 Partner Media Evaluation*, p7

<sup>2</sup> International Cricket Council, <http://www.icc-cricket.com/cricket-world-cup>, last viewed 20 May 2015

# ICC Cricket World Cup 2015 matches

## Australia

Australia hosted 26 matches for the ICC CWC 2015 including the final, across seven host cities. This allowed for greater accessibility to matches for a wide range of people in Australia. It also allowed a wide geographic area to benefit from the increased exposure to tourists and served to further enhance Australia's reputation as a premier location for international sporting events. In addition to the Tournament matches, ten warm up matches were hosted in three cities. A number of these were in venues which would not normally host this level of international cricket. An Opening Event was held in Melbourne and each city hosted a range of Tournament celebrations and special events.



\* This includes a rained out match between Australia and Bangladesh in Brisbane.

+This does not include ten warm-up matches in Australia that preceded the Tournament.

Source: International Cricket Council, <http://www.icc-cricket.com/cricket-world-cup>, last viewed 20 May 2015

# ICC Cricket World Cup 2015 matches

## New Zealand

New Zealand hosted 23 matches for the ICC CWC 2015, including a quarter and semi final, across seven host cities. This allowed for greater accessibility to matches for a wide range of people in New Zealand. It also allowed a wide geographic area to benefit from the increased exposure to tourists and served to further enhance New Zealand's reputation as a premier location for international sporting events. In addition to the Tournament matches, four warm up matches and an Opening Event were held in Christchurch. A qualification tournament was held in 2014 to identify the final two teams in the tournament, in total 46 warm-up and qualifier matches were also held in Mount Maunganui, New Plymouth, Christchurch, Lincoln, Rangiora and Queenstown. All cities hosted a range of Tournament celebrations and events.



7

host cities



7

match venues



23

matches\*



12

sold out matches



405k

tournament  
attendance



14

teams

\*This does not include four warm-up matches, or qualifier tournament matches played in New Zealand that preceded the Tournament.

Source: International Cricket Council, <http://www.icc-cricket.com/cricket-world-cup>, last viewed 20 May 2015

# Economic impacts

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# Economic impacts and benefits – approach and overview of key impacts

To analyse the economic impact and benefits of the Tournament, we collected Tournament-specific expenditure data from the LOC, host cities and through online and face-to-face surveys of match attendees. The expenditure data was modelled using a globally accepted robust economy-wide model to assess the flow-on and total economic impacts of the Tournament. This is a point of difference to other economic assessments of sports and tourism studies that rely on projected or anticipated event related activities, which tend to over estimate flow-on and total economic impacts.

Our approach is described in the following five steps:



## **1. Understanding of attendance**

We developed and launched an online survey to capture origins of match attendees and their typical length of stay. To complement this, face-to-face interviews of attendees were conducted at 12 selected matches across Australia and New Zealand. Matches selected for the survey were identified as being the greatest interest to fans, and representative of a cross-section of visitors.

## **2. Visitor spending**

The sample of match attendee information from the online and face-to-face survey was calibrated to ticketing data, ticket allocation and attendance data. This provided us with the total spending of Tournament attendees at the matches including associated tourism related activities, this formed the basis for the total direct expenditures of the Tournament.

## **3. Tournament spending**

Also included in the direct expenditure was other Tournament related spending across Australia and New Zealand as a result of hosting the Tournament. This included items such as ICC and LOC expenditure, international cricket team travel spending, capital expenditure on stadiums and host city spending.

## **4. Total economic impacts (direct and flow-on)**

The incremental portion of the total direct expenditures were then modelled using a globally accepted robust computable general equilibrium (CGE) model to assess the direct, flow-on and total economic impacts of event related expenditure. This approach is superior to simply using input-output analysis and is the preferred approach of many Governments and Treasury Departments in Australia and New Zealand.<sup>1</sup>

## **5. Analysis of broader benefits (next section)**

Finally, the analysis included a qualitative recognition of positive lasting benefits stemming from the ICC Cricket World Cup in 2015. This included those relating to schools, cultural and social communities, local cricket clubs and increased participation in cricket across the two nations.

Further detail on our methodology and approach can be found in Appendix A – Economic modelling approach.

The key results of the economic impacts and benefits are presented in the following pages.

<sup>1</sup> Australia: Department of Treasury and Finance (2013), Economic Evaluation for Business Cases Technical Guidelines, page 11  
New Zealand: Ministry of Business, Innovation and Employment, (2012) Post-Event Economic Evaluation Guidelines, page 3

## ***Attendance (cont'd)***

### ***The most popular ICC Cricket World Cup ever***

The ICC CWC 2015 was hailed by the ICC Chairman as the ‘most popular Cricket World Cup in history’, based on a combination of attendance, television audience, and, perhaps most significantly, digital media.<sup>1</sup> The widespread reach of the Tournament across much of the globe, including many non-cricketing nations, was one of the main contributors to its overwhelming success.

#### ***Digital media***

The ICC CWC 2015 drew momentous popularity across almost all digital mediums, making it the third largest international sporting event ever in terms of digital reach (more than doubling the Sochi Winter Olympics in 2014). It also included an India versus Pakistan match that was the most talked about cricket match in digital history.

Overall, the ICC CWC 2015 received 57.5 billion social media impressions. In particular, there were 1.4 billion live views of tweets relating to the Tournament, 700 million interactions about the ICC CWC 2015 on Facebook, and 5.8 million Likes for the Tournament Facebook page (17.3 million cumulative Likes across all ICC Facebook pages). The ICC CWC 2015 dedicated website also hosted an estimated 35.9 million unique visitors, and 4.69 million users downloaded the official Tournament mobile application. Further, 746.4 million search engine impressions were related to the Tournament.<sup>2</sup>

<sup>1</sup>International Cricket Council, *ICC Chairman Hails ICC Cricket World Cup 2015 As ‘Most Popular in History’*, <http://www.icc-cricket.com/cricket-world-cup/news/2015/media-releases/87575/icc-chairman-hails-icc-cricket-world-cup-2015-as-most-popular-in-history>, last viewed 26 May 2015

<sup>2</sup>International Cricket Council, *ICC Cricket World Cup 2015 – Digital Report*

#### ***Tournament attendance***

The aggregate attendance for the Tournament was over one million, including three matches that exceeded the 80,000 attendance mark. In total, 20 matches were sold out, including every match involving New Zealand. Eight of the sold out matches did not feature either of the host nations, highlighting the success of multicultural engagement programs over the years leading up to the Tournament. The ICC CWC 2015 final, played at the Melbourne Cricket Ground, was witnessed by the highest ever officially recorded attendance in the world for any single day of cricket in history (93,013).<sup>3</sup>

#### ***Television audience***

The Tournament was broadcast to an estimated television audience of 1.56 billion people (with a potential viewership of 2.51 billion worldwide), making it one of the most watched sporting events in history. A total of 44 licensees broadcast the event in seven different languages and across 212 international markets, totaling to more than 19,000 hours of coverage.<sup>4</sup> ICC CWC 2015 final broke the television record for a cricket match in Australia or New Zealand (peaking at 4.22 million viewers in Australia and almost two million in New Zealand).<sup>5</sup>

<sup>3</sup>ESPN Cricinfo (2015), <http://stats.espncricinfo.com/ci/content/records/283309.html>, last viewed 20 May 2015

<sup>4</sup>SMG Insight, *ICC Cricket World Cup 2015 – Sponsor 1 Partner Media Evaluation*

<sup>5</sup>Sinclair, Lara, Cricket World Cup breaks ratings records (Mar 30, 2015), *The Australian Business Review*

# Economic impact analysis

## Unique visitors

### Visitation

On average, visitors to the ICC CWC 2015 (including home-state/home-region visitors) attended two matches with an average of 2.1 matches in Australia and 1.8 matches in New Zealand. This resulted in a total of 595,000 unique visitors to the Tournament across Australia and New Zealand with 370,000 unique visitors to Australia and 225,000 unique visitors to New Zealand. Our survey results, as well as ticketing data obtained from the LOC indicated that the international component of visitation was 27 per cent in Australia and 20 per cent in New Zealand.

### Visitor spending

Economic impact analysis has been used to capture a comprehensive view of the impact of the ICC CWC 2015, on the Australian and New Zealand economies. To estimate the total economic impacts of the Tournament, it was necessary to define and determine the impacts to be included as part of this study. The key drivers of increased economic activity associated with the ICC CWC 2015 include spending by local (i.e. home-state/home-region), interstate/inter-region and international visitors. Although it can be argued that spending by local visitors at the event may have occurred irrespective of the event, this is addressed in the flow-on and total impacts and the direct economic impacts captures the total or gross economic activity as a result of hosting the ICC CWC 2015.

Interstate/inter-region visitor spend impacts the economy of the state/region hosting the event and is included in the calculation of total direct expenditures.

International attendees came from all over the world, with the majority of visitors originating from Asia (however the highest observed countries of origin were the United Kingdom and the United States of America). International visitors generated significant tourism spending in the Australian and New Zealand economies, including spending on accommodation, transport services, and dining at local restaurants, which generated economic gains and helped support additional local jobs.

	Total Australia and New Zealand	Australia	New Zealand
<b>Home-state/home-region visitors</b>	300,000	165,000	135,000
<b>Interstate/inter-region visitors</b>	150,000	105,000	45,000
<b>International visitors</b>	145,000*	100,000	45,000
<b>Total visitors</b>	<b>595,000</b>	<b>370,000</b>	<b>225,000</b>

\* This total includes 50,000 trans-Tasman visitors

Note that these numbers have been rounded to the nearest 5,000.

Source: PwC analysis based on data obtained from LOC ticketing data and PwC online survey data.

	Total Australia and New Zealand (AU\$ and NZ\$)	Australia (AU\$)	New Zealand (NZ\$)
<b>Home-state/home-region visitor spending</b>	AU\$200m NZ\$210m	AU\$120m	NZ\$80m
<b>Interstate/inter-region visitor spending</b>	AU\$245m NZ\$255m	AU\$195m	NZ\$50m
<b>International visitor spending</b>	AU\$410m NZ\$430m	AU\$325m	NZ\$80m
<b>Total visitors spending</b>	<b>AU\$850m NZ\$895m</b>	<b>AU\$640m</b>	<b>NZ\$210m</b>

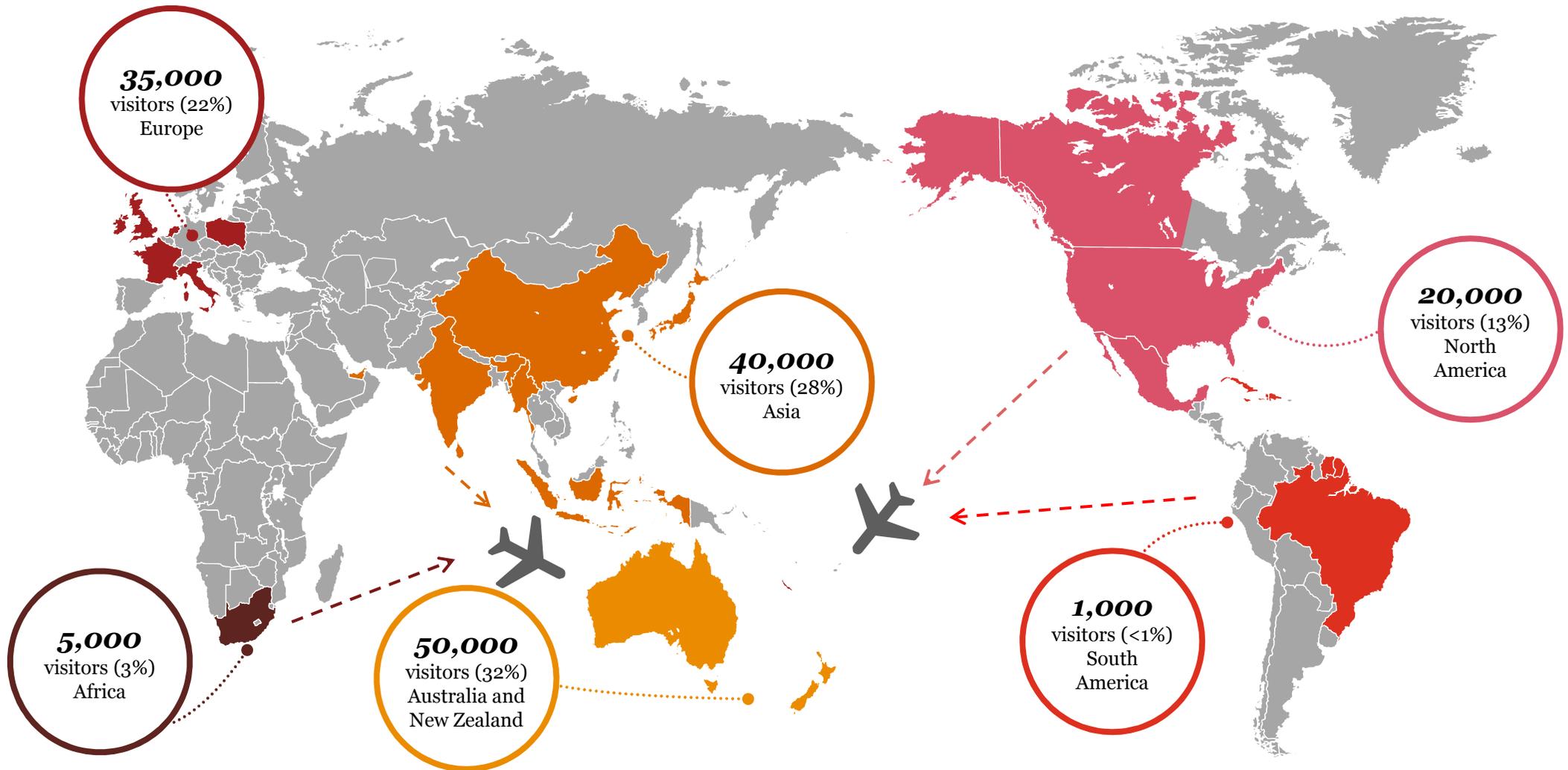
All figures are GST inclusive.

Note: All dollar values in the table above have been rounded to the nearest \$5 million, therefore some totals may not sum exactly. This includes the summation of Australian and New Zealand dollar values to arrive at dual currency totals across both nations. Exchange rates represent the average of January to March in 2015, sourced from the Reserve Bank of Australia (1 AUD = 1.05 NZD).

Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

## Attendance (cont'd)

ICC Cricket World Cup 2015 attracted unique visitors from five continents outside Australia and New Zealand



Note: Percentages represent international visitors, including those from Australia and New Zealand, who attend matches in Australia and New Zealand. Note that these numbers have been rounded to the nearest 5,000 (other than South America, due to volume). Percentages may not sum to 100 per cent due to rounding.

Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

# Economic impact analysis - expenditure

## A significant international contribution

In determining the total direct expenditures of the ICC CWC 2015, data was collected from a number of sources. The total direct expenditures considered in this study include all spending activities attributable to the Tournament.

As shown, AU\$105m/NZ\$110m of foreign direct investment was spent in delivering the Tournament, supplemented by a further AU\$410m/NZ\$430m spent by international visitors. This represented a significant injection into the two economies.

To estimate the total economic impact, through economic modelling, an understanding of the incremental expenditures are required. This is a subset of the total direct expenditures mentioned above. While the total direct expenditures represent the gross spending associated with the Tournament, the incremental expenditure is only that spending that is induced by the Tournament.

For all activities except visitor spend, the total direct expenditures are the same as the incremental expenditures, as none of the spending would have occurred if not for the ICC CWC 2015. Further detail on the methodology and approach is outlined in Appendix A.

The following table outlines the information included in the incremental and total direct expenditure estimates. The 'Total Australia and New Zealand' column illustrates the total expenditure across both countries in Australian and New Zealand dollars. The separate 'Australia' and 'New Zealand' columns show expenditure in the two countries separately.

### Breakdown of direct expenditures in the Australian and New Zealand economies (2013-2015)

Item	Description	Total Australia and New Zealand (AU\$ and NZ\$)	Australia (AU\$)	New Zealand (NZ\$)
<b>Unique visitor spend – home-state/home-region</b>		AU\$200m NZ\$210m	AU\$120m	NZ\$80m
<b>Unique visitor spend – interstate/inter-region</b>	• Spending by visitors in or to Australia and New Zealand as a direct result of their attendance at the ICC CWC 2015 matches, lead-up events or Tournament related activities.	AU\$245m NZ\$255m	AU\$195m	NZ\$50m
<b>Unique visitor spend – international</b>		AU\$410m NZ\$430m	AU\$325m	NZ\$80m
<b>Tournament delivery – local expenditure</b>	• Locally funded expenditure conducted by local organising committees in Melbourne and Wellington in organising and running the Tournament • Expenditure by host cities on city dressing, marketing, events, transport and other city services. • Capital expenditure on stadiums in preparation for the Tournament.	AU\$120m NZ\$130m	AU\$85m	NZ\$35m
<b>Tournament delivery – foreign expenditure</b>	• Overseas funded expenditure conducted by local organising committees in Melbourne and Wellington in organising and running event. • Expenditure by international teams, funded by the ICC (including travel and accommodation). • Expenditure by overseas delivery partners such as signage, broadcasters, media, sponsor operations and logistics providers.	AU\$105m NZ\$110m	AU\$60m	NZ\$45m
<b>Total direct expenditure</b>	• Represents the gross spending associated with the Tournament and is a summation of the visitor and Tournament spending.	<b>AU\$1.10b NZ\$1.15b</b>	<b>AU\$785m</b>	<b>NZ\$295m</b>
<b>Incremental expenditure</b>	• Represents spending that is induced by the Tournament and removes home-state/home-region visitor spending. This is a subset of the total direct expenditure above.	<b>AU\$865m NZ\$910m</b>	<b>AU\$675m</b>	<b>NZ\$200m</b>

All figures are GST inclusive, in nominal dollars representing expenditure during the period 2013-2015 (calendar years).

Note: All dollar values in the table above have been rounded to the nearest \$5 million., therefore totals may not sum in some instances. This includes summation of Australian and New Zealand dollar values to arrive at dual currency totals across both nations. Exchange rates have been applied as relevant averages across 2013 – 2015, sourced from the Reserve Bank of Australia. That is, expenditures incurred in 2013 have been applied at the 2013 exchange rate, and so on. 2015 exchange rates are representative of January to March only. Exchange rates used for each year are as follows: 2013: 1 AUD = 1.17 NZD, 2014: 1 AUD = 1.09 NZD, 2015: 1 AUD = 1.05 NZD. Source: Tournament delivery data sourced from LOC financial data, analysed by PwC. Unique visitor data sourced from LOC ticketing data and PwC online survey data. This data was combined with PwC face-to-face survey data on expenditure to estimate total visitor spend.

# Total economic impacts of the ICC Cricket World Cup 2015

To estimate the total economic impact, through economic modelling, an understanding of the incremental expenditures are required, which is a subset of the total direct expenditures. While the total direct expenditures represent the gross spending associated with the Tournament, the incremental expenditure is only that spending that is induced by the Tournament and removes home-state/home-region visitor spending. The incremental expenditures were then modelled using a globally accepted robust computable general equilibrium (CGE) model to assess the direct and flow-on economic impacts of all event related expenditure. The table below illustrates our estimated impacts on three key macroeconomic variables: gross domestic product (GDP), employment (expressed as the number of full-time equivalent jobs), and household consumption.

## Breakdown of contribution to Australia and New Zealand's direct and flow-on GDP impacts, full-time equivalent (FTE) job impacts and household consumption impacts (2013-2015)



Item	Impact category	Total Australia and New Zealand	Australia	New Zealand
Tournament delivery	Incremental expenditure	AU\$225m NZ\$240m	AU\$145m	NZ\$80m
	GDP (\$2015)	AU\$145m NZ\$150m	AU\$110m	NZ\$35m
	FTE	2,420	1,670	750
	Household consumption (\$2015)	AU\$105m NZ\$110m	AU\$95m	NZ\$11m
Unique visitor spend – interstate/inter-region	Incremental expenditure	AU\$245m NZ\$255m	AU\$195m	NZ\$50m
	GDP (\$2015)	AU\$105m NZ\$110m	AU\$75m	NZ\$30m
	FTE	2,010	1,410	600
	Household consumption (\$2015)	AU\$65m NZ\$70m	AU\$60m	NZ\$7m
Unique visitor spend – international	Incremental expenditure	AU\$410m NZ\$430m	AU\$325m	NZ\$80m
	GDP (\$2015)	AU\$210m NZ\$220m	AU\$165m	NZ\$45m
	FTE	3,900	2,890	1,010
	Household consumption (\$2015)	AU\$160m NZ\$170m	AU\$150m	NZ\$12m
Total	Incremental expenditure	AU\$865m NZ\$910m	AU\$675m	NZ\$200m
	GDP (\$2015)	AU\$460m NZ\$480m	AU\$350m	NZ\$110m
	FTE	8,320	5,960	2,360
	Household consumption (\$2015)	AU\$330m NZ\$350m	AU\$305m	NZ\$30m

Note: All figures are GST inclusive, in \$2015, representing impacts from 2013-2015, undiscounted. Incremental expenditure, GDP and Household consumption are rounded to the nearest \$5,000,000. FTEs are rounded to the nearest 10. As each individual number is rounded to these denominations, totals may not sum in some instances. This includes summation of Australia and New Zealand dollar values to arrive at dual currency totals across both nations. Exchange rates have been applied as relevant averages across 2013 – 2015, sourced from the Reserve Bank of Australia. That is, expenditures incurred in 2013 have been applied at the 2013 exchange rate, and so on. 2015 exchange rates are representative of January to March only. Exchange rates used for each year are as follows: 2013: 1 AUD = 1.17 NZD, 2014: 1 AUD = 1.09 NZD, 2015: 1 AUD = 1.05 NZD.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC.

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# *Total economic impacts of the ICC Cricket World Cup 2015 (cont'd)*

## ***Total economic impacts***

Increased spending, as a result of the Tournament, created positive impacts on the economy as illustrated through an uplift to three key macroeconomic variables: gross domestic product (GDP), full-time equivalent jobs and household consumption. These impacts are a result of modelling the incremental expenditure (a sub-set of the total direct expenditure) into an economy-wide model.

### ***GDP***

As a result of the Tournament, GDP impacts are most significant in the hospitality and transport sectors, largely in part due to visitor spending on accommodation, food and beverage, merchandise and travel.

### ***Employment***

Tournament activity also resulted in workforce increases through new full-time equivalent jobs (FTE)<sup>1</sup> in various sectors, such as construction, retail trade, hospitality and professional services.

### ***Household consumption***

With an increase in employment, consumption, a key measure of economic welfare, also rises. This is because household income increases with a higher level of employment, therefore allowing consumption to expand.

A summary of impacts to each key macroeconomic variable is provided on the right of this page.

## ***The ICC Cricket World Cup 2015 has provided:***

To Australia

- AU \$350m to GDP
- 5,960 full-time equivalent jobs
- AU \$305m in household consumption

To New Zealand

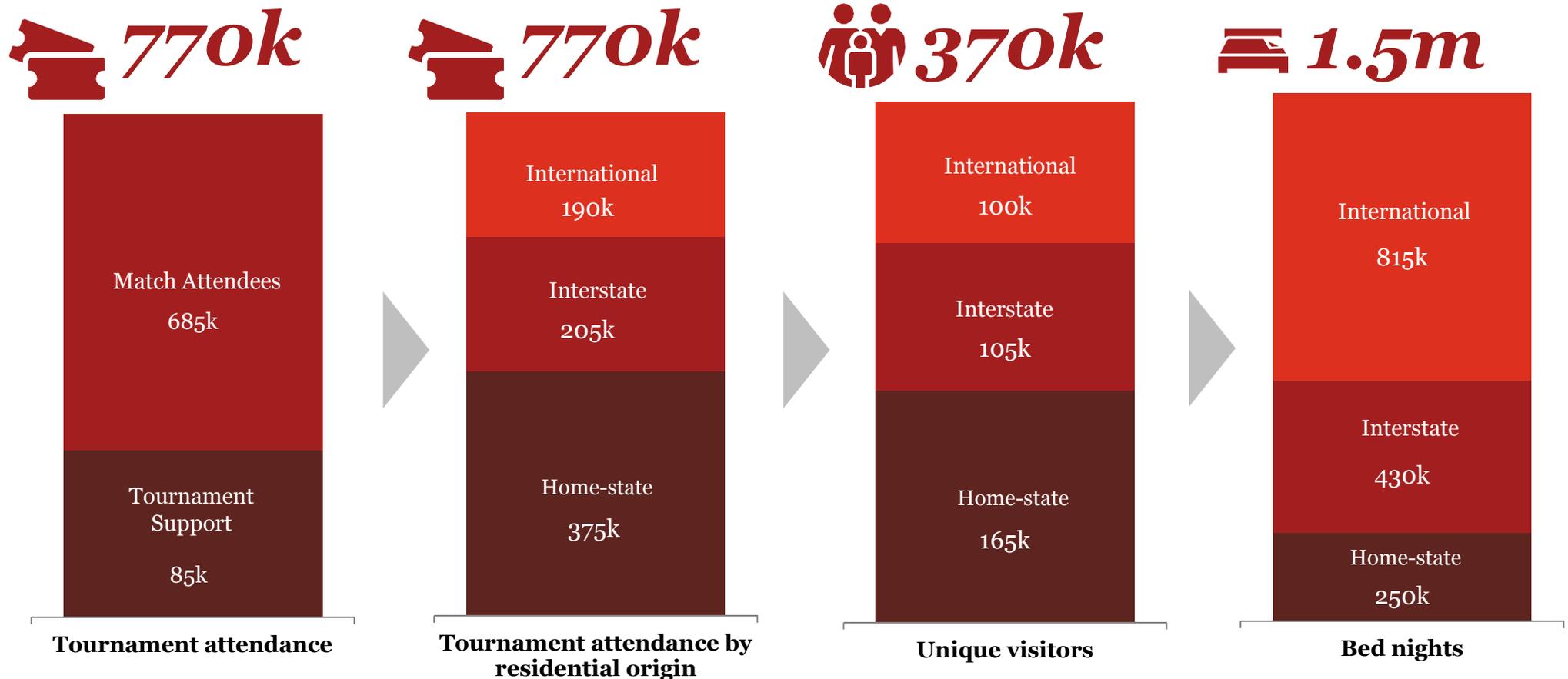
- NZ \$110m to GDP
- 2,360 full-time equivalent jobs
- NZ \$30m in household consumption<sup>2</sup>

<sup>1</sup> FTE jobs are measured based on the total hours worked in a standard working week, which is assumed to be 37.5 hours.

<sup>2</sup> PwC analysis based on PwC survey and ticketing and financial data provided by the LOC

# Summary of ICC Cricket World Cup 2015

## Australia – Attendance



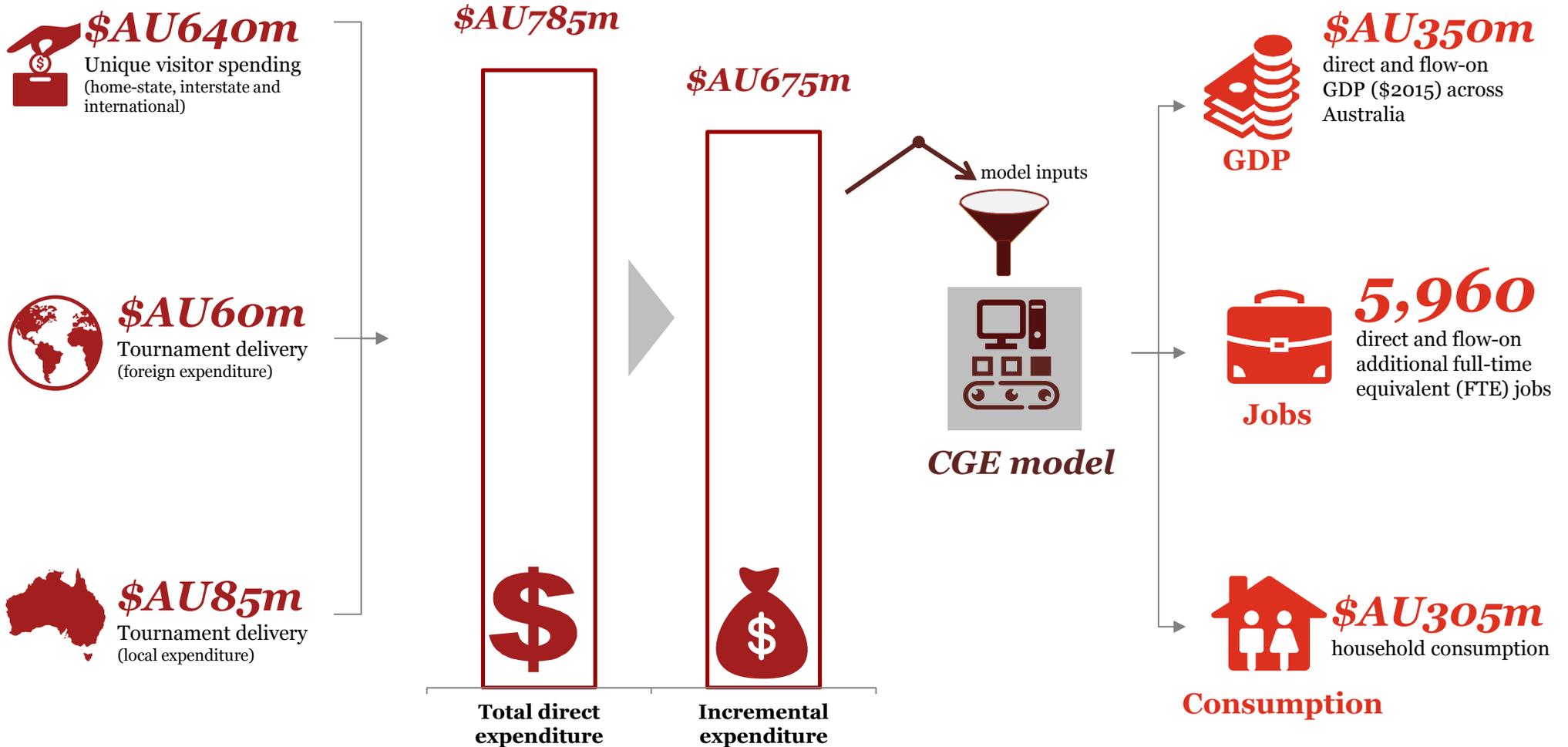
Tournament attendance represents the aggregate match attendance (officially recorded attendees) and Tournament support attendees (personnel involved in the delivery of venues, matches and pre-Tournament events) to International Cricket Council Cricket World Cup 2015 matches and related events.

Tournament attendance can be analysed by residential origin (home-state, interstate and international)

Unique visitors are the number of unique people visiting a state or region as a direct result of the Tournament, including those who attend matches within their home-state. Unique visitors represent a sub-set of Tournament attendance.

Bed nights represents the number of nights stayed by unique visitors in host cities as a direct result of the Tournament.

# Summary of ICC Cricket World Cup 2015 Australia – Expenditure and Total Impacts

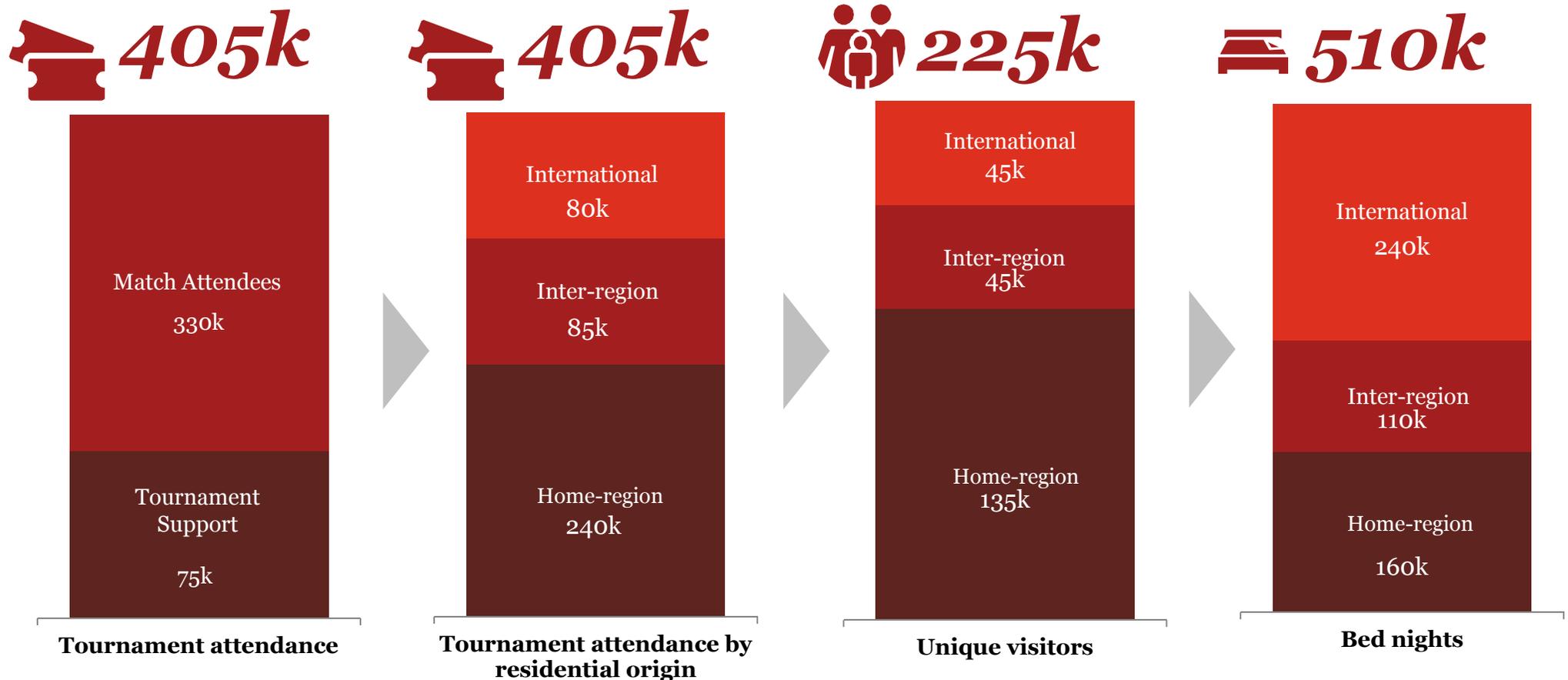


Total direct expenditure represents the gross spending associated with the Tournament and is the total of visitor and Tournament spending. However, in order to estimate the total economic impact of hosting the Tournament, an understanding of the incremental expenditures are required. This is a subset of the total direct expenditures and represents the portion of spending that is induced by the Tournament. In our analysis the incremental expenditures represent visitor and Tournament spending and removes home-state visitor spending as this would have likely been spent in the home-state regardless of the event.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Summary of ICC Cricket World Cup 2015

## New Zealand – Attendance



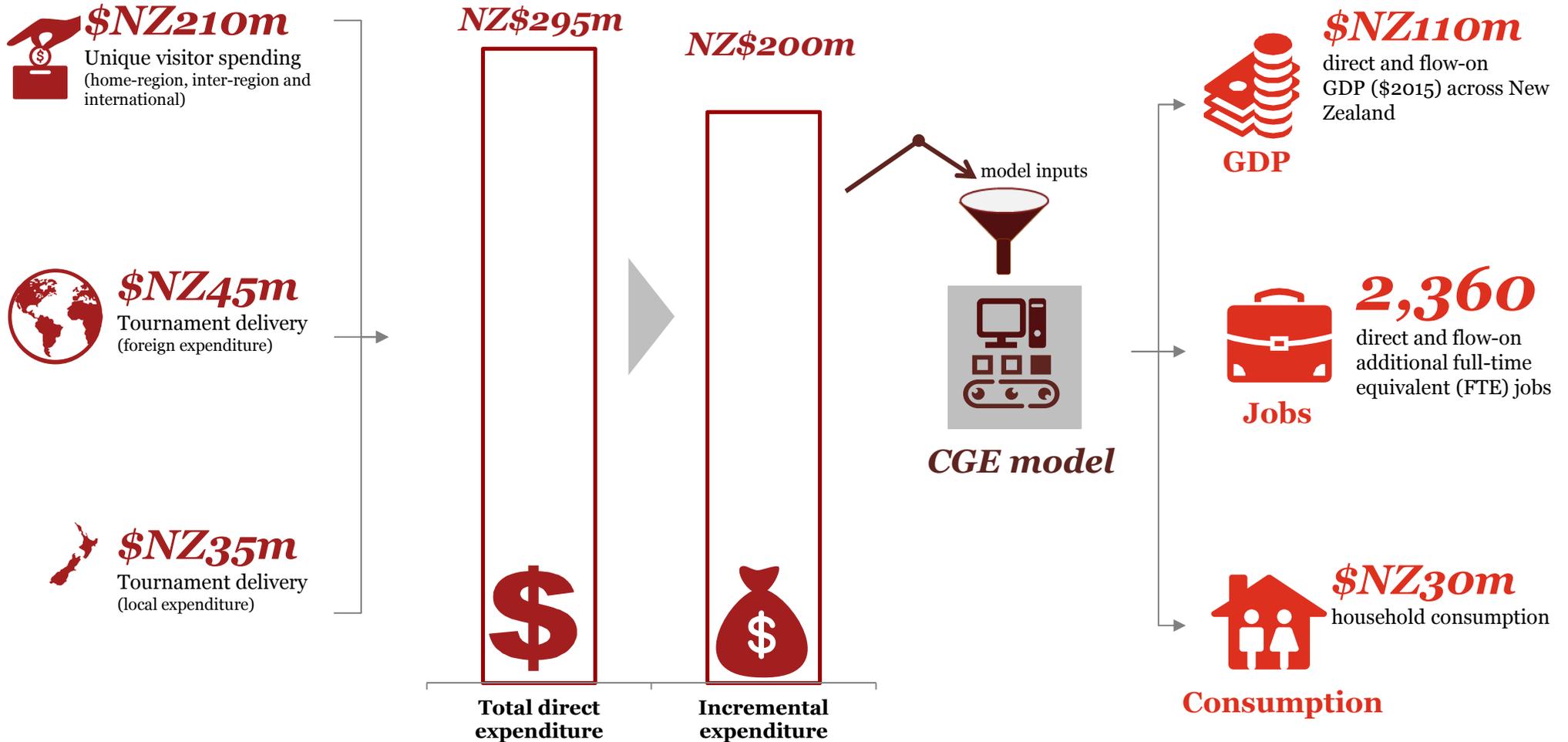
Tournament attendance represents the aggregate match attendance (officially recorded attendees) and Tournament support attendees (personnel involved in the delivery of venues, matches and pre-Tournament events) to International Cricket Council Cricket World Cup 2015 matches and related events.

Tournament attendance can be analysed by residential origin (home-region, inter-region and international).

Unique visitors are the number of unique people visiting a state or region as a direct result of the Tournament, including those who attend matches within their home-region. Unique visitors represent a sub-set of Tournament attendance.

Bed nights represents the number of nights stayed by unique visitors in host cities as a direct result of the Tournament.

# Summary of ICC Cricket World Cup 2015 New Zealand – Expenditure and Total Impacts



Total direct expenditure represents the gross spending associated with the Tournament and is the total of visitor and Tournament spending. However, in order to estimate the total economic impact of hosting the Tournament, an understanding of the incremental expenditures are required. This is a subset of the total direct expenditures and represents the portion of spending that is induced by the Tournament. In our analysis the incremental expenditures represent visitor and Tournament spending and removes home-state visitor spending as this would have likely been spent in the home-state regardless of the event.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Broader benefits

4



## ***Broader benefits***

### ***Branding and promotion***

In contrast to economic impacts, broader benefits comprise measures that are qualitative in nature and may be either activity or outcome-based. They also describe long-term or downstream activity that may not normally be captured in economic impacts. While economic impacts make use of standard measures that can be estimated for nearly any type of event, broader benefits and their accompanying measures may vary greatly by project. Outlined below are some of the broader benefits to New Zealand and Australia's economies of hosting the ICC CWC 2015.

### ***Branding and promotion***

ICC CWC 2015 marketed Australia, New Zealand and the 14 host cities on a global scale with increasing frequency over 20 months from the Tournament launch in July 2013 until the end of the Tournament across a range of communications channels including through: live broadcasts of the matches, mainstream media coverage in newspapers, radio and online, the Tournament's own heavily patronised digital platforms, diplomatic channels and the tourism and travel industry.

Global broadcast statistics confirm a television audience of 1.56 billion viewers in 212 markets:

- Media monitoring by iSentia recorded more than 181,000 articles between August 2013 and April 2015 across local media and overseas online outlets, with a potential reach of 2.8 billion people.<sup>1</sup>
- Television broadcasts were made in seven different languages via 44 licensees.<sup>2</sup>
- Radio broadcasting reached 80 different territories.<sup>3</sup>

Digital media has been an important source of exposure for the host countries and cities. For example:

- Cricket news and information destination Cricbuzz received over one billion visits during the Tournament.
- ICC CWC 2015 generated over 17 million Facebook 'likes', and over 700 million Facebook interactions about ICC CWC 2015.<sup>4</sup>
- There were almost 3.5 million ICC CWC twitter followers.<sup>5</sup>
- The ICC CWC 2015's own digital platforms provided channels to reach a vast international audience. Its website attracted 36 million unique visitors, and 304 million page views – a ten-fold increase on any previous ICC event.<sup>6</sup>

The level of international interest in and exposure of the Tournament means both Australia and New Zealand have strengthened their reputations for hosting major events and as attractive tourism destinations.

<sup>1</sup> iSentia, <http://isentia.sensed.com.au/>, last viewed 20 May 2015

<sup>2</sup> Newfanzone, <https://newfanzone.wordpress.com/tag/icc-cricket-world-cup-2015/>, last viewed 20 May 2015

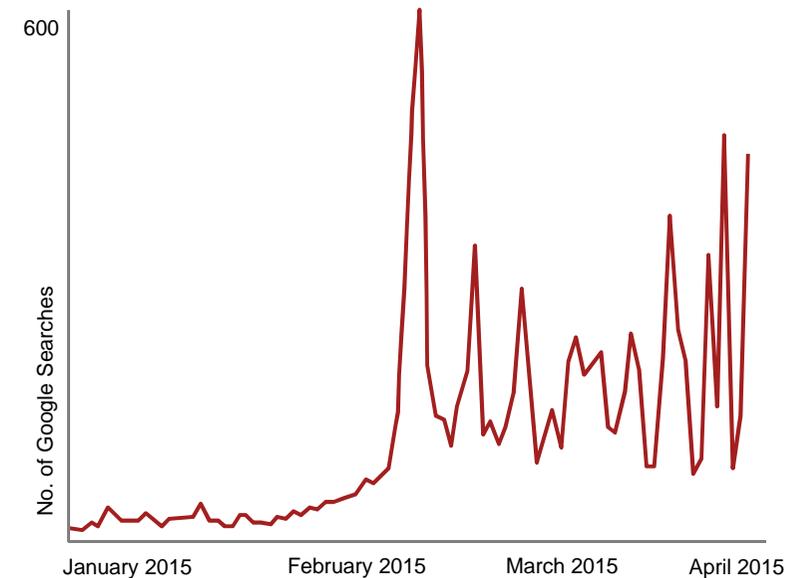
<sup>3</sup> Ibid

<sup>4</sup> Provided by the LOC

<sup>5</sup> Ibid

<sup>6</sup> International Cricket Council, <http://www.icc-cricket.com/cricket-world-cup/news/2015/media-releases/87575/icc-chairman-hails-icc-cricket-world-cup-2015-as-most-popular-in-history>, last viewed 18 May 2015

### ***ICC Cricket World Cup Google searches over time***



Source: Topsy,

<http://topsy.com/analytics?q1=%23cwc2015&q2=%23cwc15&q3%20=cricket%20world%20cup&via=Topsy>, last viewed 27 April 2015

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## ***Broader benefits (cont'd)***

### ***Tourism, infrastructure and trade***

#### ***Tourism***

Australia and New Zealand and the host cities have enhanced their reputations as international tourist and business friendly destinations. Coordinated and streamlined visa and customs processes put in place by each national government made entry to both countries more efficient for international visitors than it would otherwise have been. An innovative joint tourism visa for Australia and New Zealand was implemented for the first time as a direct result of the event.

The media opportunities provided by the Tournament are expected to have a 'halo' affect that will encourage and drive future travel into the region. Strategic airline and partners supplemented the appealing imagery and brand content for the Tournament by providing a strong call-to-action and attractive packages for potential travellers to book their holiday.

Arrivals data indicates that visitors to Australia and New Zealand from India during the January to March 2015 quarter were 33 per cent<sup>1</sup> and 38 per cent<sup>2</sup> higher respectively than in the corresponding period in 2014.

#### ***Infrastructure***

ICC CWC 2015 helped support the redevelopment of Hagley Oval in Christchurch and was a catalyst for infrastructure upgrades at Bellerive Oval in Hobart and Manuka Oval in Canberra.

In addition, the Tournament provided a return on the investment in sporting infrastructure in Host Cities by successive governments, validating the decision to invest in these areas.

#### ***Trade***

ICC CWC 2015 gave Australian and New Zealand businesses and governments an avenue to showcase their abilities and to host international investors, driving further indirect economic benefits from the Tournament. Austrade and New Zealand Trade and Enterprise in conjunction with States and Regions organised specific programs for this purpose.

Both the Australian and New Zealand national governments and the Australian state governments incorporated ICC CWC 2015 into a number of diplomatic initiatives such as high-level government and official meetings. ICC CWC 2015 promotional collateral was provided to support trade missions to India, Sri Lanka, Pakistan, South Africa, the Caribbean, the United States of America and the United Kingdom, boosting the level of interest and media coverage in those countries.

<sup>1</sup> Tourism Research Australia: Visitor Arrivals Data, <http://www.tourism.australia.com/statistics/arrivals.aspx>, last viewed 21 May 2015

<sup>2</sup> Statistics New Zealand: International Visitor Arrivals to New Zealand, <http://www.stats.govt.nz/iva>, last viewed 20 May 2015

# **Broader benefits (cont'd)**

## **Connections and engagement**

### **Connections**

Relationships between the cricket administrative bodies in both countries and a wide and diverse range of community groups and cricket stakeholders have been considerably strengthened by ICC CWC 2015.

### **The next generation**

There was a particular focus on engaging with children, recognising that they are the future of the game as players, fans and supporters of the sport. 2,516 Australian schools and 1,380 New Zealand schools took part in a bespoke schools program that offered online curriculum based learning and teaching resources designed to celebrate the game of cricket and ICC CWC 2015; every participating school in New Zealand received a cricket kit; the promotional programmes during the Tournament offered young cricket fans the chance to walk onto the field with their favourite players.<sup>1</sup>

Children were well represented among those who attended matches. There is an expectation that the success of the Tournament, and specifically the success of the Australian and New Zealand teams, will encourage greater numbers of children to take up the sport.

### **Participation**

ICC CWC 2015 provided the opportunity for Cricket Australia and New Zealand Cricket, along with State, Territory and Major Cricket Associations, their staff and stakeholders, to participate directly in the sport's pinnacle international event.

This experience has provided many individuals within these organisations with direct major event experience, which contributes both to their standing in their profession and their overall capability.

### **Widespread involvement**

ICC CWC 2015 presented the community with the chance to get involved in the Tournament in various capacities.

3,550 volunteers were accredited to perform a variety of roles during the Tournament while 1,000 club bowlers had the opportunity to bowl to visiting teams during scheduled training sessions.<sup>2</sup>

### **Once in a generation opportunity**

As it was 23 years since ICC CWC was last hosted in Australia and New Zealand, the 2015 Tournament was a rare and highly valued opportunity for New Zealand and Australian cricket fans to watch the world's elite cricket players live.

The event provided invaluable opportunities for local industries such as hospitality and event management services to acquire further experience in hosting a major event.

### **New communities**

Widespread involvement in large-scale events enhances social cohesion and a spirit of community. ICC CWC 2015 exemplified this by celebrating diversity in harmony, successfully attracting the interest and participation of multicultural communities.

Of the 20 sold out matches in the Tournament, eight did not involve either of the host nations which demonstrated the high level of patronage by supporters of other teams. In fact 13 of the 14 teams played in front of sell out crowds.

The match between India and South Africa at the Melbourne Cricket Ground attracted 86,876 people – the highest attendance of any match in the Tournament other than the Final.<sup>3</sup>

The strength of the multicultural connection with and interest in the Tournament was further evidenced by ethnic business groups using the Tournament to actively engage in establishing or enhancing relationships with Australian, New Zealand and other businesses and by the significant multicultural media coverage of the Tournament.

On average, one community activation event was hosted each week in the year leading up to the Tournament.

<sup>1</sup> Ibid  
<sup>2</sup> Ibid  
<sup>3</sup> Ibid

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## ***Broader benefits (cont'd)***

### ***Relationships***

#### ***Government to government***

The high level of government input to deliver the Tournament required considerable communication and cooperation between the Australian Federal Government and the New Zealand Government. This has contributed to a further strengthening of the already close relationship between the two countries at top government levels.

The Australian and New Zealand Governments each established a centralised agency to help coordinate their support and services across government agencies as well as Trans-Tasman government relations. The Major Sporting Events Taskforce in Australia and the World Cups Office in New Zealand brought together the key government departments and agencies including Immigration, Customs and Border Control, Security, Foreign Affairs and Trade and Tourism.

#### ***National, state and local government***

National, state and local government have been integral to the success of ICC CWC 2015. An event of this scale cannot be delivered without the active participation and cooperation of all levels of government.

Government involvement was required in a wide number of areas, for example from developing the joint Australian/New Zealand tourism visa to on-the-ground support in areas such as security, transport, customs and immigration.

In addition, anti-scalping and ambush marketing legislation was enhanced and this will protect future events.

State and regional coordination groups effectively integrated the planning and delivery activities of key government departments and agencies together with cricket associations and the LOC.

The engagement with the various levels of government has been intensive and positive. Both Cricket Australia and New Zealand Cricket have strengthened existing relationships with all levels of their respective governments and, importantly, established new relationships and linkages.

#### ***International***

Delivering the Tournament required a high level of engagement with representatives of participating teams' governments in both host countries. This has provided both Cricket Australia and New Zealand Cricket with networks of contacts within diplomatic communities that are enthusiastic about cricket.

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## ***Broader benefits (cont'd)***

### ***Pride and social responsibility***

#### ***Local pride***

ICC CWC 2015 enhanced civic pride and amenity in host cities by providing local people with the chance to participate directly in a major international sporting event and associated host city activities and celebrations.

#### ***National pride***

ICC CWC 2015 was a large scale, international event. The successful hosting of the Tournament, the opportunity for Australians and New Zealanders to show off their countries to a large international audience and, importantly, the success of the both national teams engendered a sense of camaraderie and pride on a national scale.

#### ***Cricket pride***

The Tournament has helped to reinvigorate one-day cricket as a format. In New Zealand in particular, the success of the Tournament and the performance of the Black Caps generated renewed interest in cricket.

#### ***Encouraging philanthropy***

The Tournament had four official charity partners – two local and two international – who benefited from a platform to raise awareness for their respective causes. The partner charities were:

- The McGrath Foundation (breast cancer prevention and support)
- The Cancer Society of New Zealand
- Room to Read (an international literacy program)
- ThinkWise (HIV awareness and education)<sup>1</sup>

#### ***Vanuatu cyclone disaster relief***

As a gesture of solidarity, the ICC, Cricket Australia, New Zealand Cricket and cricket fans contributed more than \$200,000 during ICC CWC 2015 to assist the communities affected by Cyclone Pam.<sup>2</sup>

<sup>1</sup> Provided by the LOC

<sup>2</sup> Ibid

# *Appendix A*

## Economic modelling approach



# Key terms

## People



Term	Definition for purpose of the report
<b>Home-state</b>	Refers to visitors or attendees who originate from the same Australian state as that in which the match is being played.
<b>Home-region</b>	Refers to visitors or attendees who originate from the same New Zealand region as that in which the match is being played. The analysis considers three New Zealand regions (Auckland, Canterbury and Wellington), and an aggregate of the rest of New Zealand.
<b>Match attendance</b>	This is the officially recorded attendance number for Tournament matches and includes online ticket purchases, box office walk-ups, hospitality, ICC travel packages, schools/staff, players and match officials, families of players, working media, other contractual tickets, and ICC and LOC staff.. The number of match attendees is a subset of the number of attendees. Note that attendance to warm up matches and pre-tournament events is not included.
<b>Tournament support</b>	Represents the personnel who were involved in the delivery of venues, matches, and host cities (including parties such as security, event staff, caterers, and volunteers) during and also in the lead up to the Tournament (i.e. including ICC conferences, venue inspection tours, and the Qualifying Tournament).
<b>Tournament attendance</b>	Tournament attendance represents the total number of persons that attended the ICC CWC 2015. This is the sum of match attendance and Tournament support personnel. Note that attendance to warm-up matches is not included.
<b>Unique visitors</b>	Unique visitors are the number of unique people visiting a state or region as a direct result of the ICC CWC 2015 (i.e. a person may travel to Melbourne and buy tickets to three different matches, therefore equating to one unique visitor, but accounting for three in the attendance figure). For the purpose of this analysis, we also consider unique visitors to be those attending matches in their home-state/home-region. The term also incorporates persons entering an Australian state or New Zealand region in 2013 or 2014 for Tournament related events or activities.
<b>Bed nights</b>	Represents the number of nights stayed in host cities as a direct result of the ICC CWC 2015.

## Economic



Term	Definition for purpose of the report
<b>Total direct expenditure</b>	Incorporate all actual expenditure generated as a direct result of the Tournament including domestic and foreign funds spent in delivering the Tournament, and spending by visitors.
<b>Incremental expenditure</b>	Represents spending that is induced by the Tournament and removes home-state/home-region visitor spending. This is a subset of the total direct expenditures.
<b>Direct impacts</b>	Direct stimulus provided to the Australian and New Zealand economies through the incremental expenditure as a result of the Tournament.
<b>Indirect or flow-on impacts</b>	The direct spending, will flow through the Australian and New Zealand economies to stimulate other industries. These flow-on impacts arise from changes in activity for suppliers through the various industry's supply chain.
<b>Total economic impacts</b>	Represent the sum of the direct and flow-on economic impacts and the most commonly used measures are Gross domestic product/gross state product (GDP/GSP/GRP), employment and household consumption.
<b>Gross domestic product/gross state product/gross regional product (GDP/GSP/GRP)</b>	This represents the 'value added' to the economy through spending patterns. Since the GDP/GSP/GRP figure captures the difference between the value of output and the value of intermediate inputs, it represents the unduplicated total value of economic activity that has taken place.
<b>Employment</b>	Represents the number of additional full-time equivalent jobs (FTE) created as a result of the spending made in Australia and New Zealand in connection with the ICC CWC 2015. FTE jobs are measured based on the total hours worked in a standard working week, which is assumed to be 37.5 hours.
<b>Household consumption</b>	Measures household economic wellbeing through the acquisition of goods and services. To the extent that consumption can be considered as a proxy for living standards, an increase in consumption implies the Australian and New Zealand populations are better off.

# Attendance and visitation calculations

To analyse the economic impact and benefits of the Tournament, we conducted an online survey of match attendees and a face-to-face survey of attendees at the matches. The purpose of the online survey was to develop visitor profiles by origin for all attendees. The purpose of the face-to-face survey was to ascertain average expenditure by place of origin. The data sets from the online and face-to-face surveys were combined to determine total expenditure across Australia and New Zealand. Further details of each method is provided below.

## About the online survey

In consultation with Cricket World Cup 2015 Ltd, Cricket Australia and New Zealand Cricket, an online questionnaire was developed and launched using a secure web-based survey tool. At a high level, information collected in the survey included demographics, place of origin (country, state/territory/region), matches attended, nights away from home, primary reason for travelling, and ticket purchase habits (tickets for multiple matches, purchases for others such as friends/relatives). This allowed us to identify, for example, that 12,000 visitors to ICC CWC 2015 matches in Melbourne were from the United Kingdom, and these visitors on average attended 1.2 matches and stayed 8.8 nights in Melbourne, or that 2,000 visitors to ICC CWC 2015 matches in Auckland were from India, and these visitors on average attended 1.1 matches and stayed 3.3 nights in Auckland. The survey collected information from those who purchased or received tickets to an ICC CWC 2015 match.<sup>1</sup>

On 19 January 2015, email invitations to participate in the survey were sent to 71,254 match attendees who had indicated their interest to be contacted by Cricket World Cup 2015 Ltd for promotional purposes. The survey was open for four weeks during which 14,352 people responded representing a considerably high participation rate of 20.1 per cent.

The online survey provided us with a sample of match attendees, which were cross checked and calibrated with ticket data information obtained from Ticketek through the LOC.

## About the face-to-face interviews

In consultation with Cricket World Cup 2015 Ltd, Cricket Australia and New Zealand Cricket, a face-to-face questionnaire was developed. The aim of this was to collect information from match-day attendees at the cricket grounds. The main purpose of the face-to-face interviews was to collect and profile match-day attendee expenditures by place of origin (country, state/territory/region). The face-to-face interviews provided us with a sample of 3,434 match-day attendees profiles, which were calibrated with Ticketek and online survey data. A mix of venues and teams were selected for face-to-face interviews. The following table summarises the matches in which face-to-face interviews were conducted.

Matches in Australia	Matches in New Zealand
India v Pakistan (15 Feb 2015, Adelaide)	Sri Lanka v New Zealand (14 Feb 2015, Christchurch)
South Africa v India (22 Feb 2015, Melbourne)	England v New Zealand (20 Feb 2015, Wellington)
India v West Indies (6 Mar 2015, Perth)	Australia v New Zealand (28 Feb 2015, Auckland)
Australia v Sri Lanka (8 Mar 2015, Sydney)	England v Sri Lanka (1 Mar 2015, Wellington)
Semi Final: Australia v India (18 Mar, Sydney)	India v Zimbabwe (14 Mar 2015, Auckland)
Final: New Zealand v Australia (29 Mar 2015, Melbourne)	Semi Final (24 Mar 2015, Auckland)

<sup>1</sup>PwC analysis based on PwC survey and ticketing data provided by the LOC

# Economic impact analysis

## Attendance and tourist spend

Total direct expenditure from tourist spend was obtained through an online survey, as well as face-to-face surveys of match attendees. As discussed on the previous page, the online survey enabled us to build a profile of match attendees, while the face-to-face survey was used to identify the average spend for attendees within these profiles. Our survey data was then calibrated with actual ticketing data and LOC data to form our data population.

## Tournament related expenditure

In a global event such as this, the direct economic impacts are predominately the result of expenditures on Australian and New Zealand goods and services associated with the following:

- Pre-Tournament preparations over 2013 to 2015 including stadia refurbishment, planning and operational costs.
- Match day costs including venue dressing.
- International cricket team travel and per diem allowance.
- Host city contribution for the Tournament, program delivery and security.

## Total direct expenditures versus incremental expenditures

The total direct expenditures considered in this study include all spending activities attributable to the ICC CWC 2015 and each component mentioned above is explained further on the following pages.

To estimate the total economic impact (the sum of the direct and flow-on economic impacts through economic modelling discussed in subsequent pages), the incremental expenditures are required. While the total direct expenditures represent the gross spending associated with the ICC CWC 2015, the incremental expenditures is only that spending that is induced by the ICC CWC 2015.

For all activities except visitor spend, the total direct expenditures are the same as the incremental expenditures, as none of the spending would have occurred if not for the ICC CWC 2015.

However, for visitor spend, the incremental expenditures were calculated as follows:

- All spending from international visitors (except between Australia and New Zealand) is included as that is money coming from outside the economy.

- Due to the ‘once in a lifetime’ nature of attending the ICC CWC 2015, all spending on the actual game (tickets, merchandise) and getting to the game (airfares, accommodation) are regarded as induced and coming out of savings, not sacrificing other normal spending.
- For Australian and New Zealand visitors, spending on food, drink, transport and retail is only included as the net induced amount above ordinary daily spending (as sourced from the *Australian Bureau of Statistics (ABS) Household Expenditure Survey* and the *Statistics New Zealand Household Economic Survey*).

## Economic impacts

The incremental expenditures were then modelled using a globally accepted robust computable general equilibrium (CGE) model to assess the direct and flow-on economic impacts of all event related expenditure. This approach is superior to simply using input-output analysis and is the preferred approach of many Governments and Treasury Departments in Australia and New Zealand.<sup>1</sup>

<sup>1</sup> Australia: Department of Treasury and Finance (2013), Economic Evaluation for Business Cases Technical Guidelines, page 11  
New Zealand: Ministry of Business, Innovation and Employment, (2012) Post-Event Economic Evaluation Guidelines, page 3

# Total economic impact

## Total economic impacts

When considering the total economic impacts, only incremental economic activity is considered. Therefore, the incremental portion of the total direct expenditure (excluding home-state/home-region visitor activity) were modelled using computable general equilibrium (CGE) analysis, which is a globally accepted and robust approach. The purpose of this modelling approach is to capture the total economic impacts (direct and flow-on) of an event, such as the ICC CWC 2015, on the economy. This technique overcomes the limitations of simpler input-output models, providing a more accurate estimate of the impacts and is the preferred approach of many governments and Treasury Departments in Australia and New Zealand.

Comprehensive economic impact analysis generally makes use of sophisticated economic modelling to represent an economy and simulates the effect a change has on the economy. It incorporates detailed representations of industry production, consumption, government, trade, prices and the behaviours that link the economy together.

For example, an incremental \$1 spent directly in the Australian or New Zealand economies in the restaurant industry may stimulate a further 50 cents of spending by that sector in the Australian or New Zealand food processing industry, which would then lead to 25 cents of spending in the industrial equipment industry. In this simple example, we would say that the indirect effect was equal to 75 cents for every \$1 spent, for a total expenditure effect of 1.75. From these expenditure impacts, the most commonly used of these measures are, gross domestic product (GDP)/gross state product (GSP)/gross regional product (GRP), employment and household consumption.

## Transfers of visitor spending

Visitor spending includes local (home-state/home-region), interstate/inter-region and international visitors. Interstate /inter-region visitor spend impacts the economy of the state/region hosting the event so are included in our calculation of impacts. However, interstate /inter-region spend results in a reduction in expenditure in the visitor's home state/region, as visitors displace their home-state/home-region spend with host-state/host-region spend, essentially 'cancelling out' a portion of the total direct expenditure.

To account for this displacement of spending, we reduced the portion of the total direct visitor spending we considered in our CGE model to the incremental amount, by offsetting the visitor spend in each state /region by the loss of ordinary spending of residents of that state/region. In our analysis, we only included the spend resulting from match attendance by state/region less the typically spending by state/region sourced from the Australian Bureau of Statistics Household Expenditure Survey and the Statistics New Zealand Household Economic Survey.

For example, if ordinary daily spending on food is \$10 in South Australia but a South Australian in Victoria for a game spends \$25 on food, the impact for that day is -\$10 to South Australia and +\$25 to Victoria. Although the modelling inputs are state /region based, this results in a net national impact of +\$15. Across thousands of visitors, this nets across to be positive impacts to all relevant Australian states and New Zealand regions that will sum to total incremental spending. For home-state/home-region attendant of the game, there is no transfer across states so only the incremental amount is counted in that state/region.

In our CGE analysis, we have estimated the impacts of the ICC CWC 2015 on key macroeconomic variables. Each of these measures is described below.

- **Gross domestic product/gross state product/gross regional product (GDP/GSP/GRP)** – this represents the 'value added' to the economy through spending patterns. Since the GDP/GSP/GRP figure captures the difference between the value of output and the value of intermediate inputs, it represents the unduplicated total value of economic activity that has taken place. The GDP/GSP/GRP impacts in this report represent the value added to the economy as a result of the spending made in Australia and New Zealand in connection with the ICC CWC 2015.
- **Employment** – represents the number of additional full-time equivalent jobs (FTE) created as a result of the spending made in Australia and New Zealand in connection with the ICC CWC 2015.
- **Household Consumption** – measures household economic wellbeing through the acquisition of goods and services.

Indirect or flow-on impacts and total economic impacts are described below.

- **Indirect impacts or flow-on impacts** – The incremental spending, will flow through the Australian and New Zealand economies to stimulate other industries. These flow-on impacts arise from changes in activity for suppliers through the various industry's supply chain. For example, these impacts include companies that provide goods or services in connection with consumer spending resulting from the Tournament. An example of an indirect impact related to consumer spending would include incremental demand for a food product supplier.
- **Total impacts** – represent the sum of the incremental direct and indirect economic impacts.

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# CGE modelling

## CGE Modelling of Australian impacts

A CGE model is a mathematical model of an economy that is capable of capturing economy-wide impacts and inter-sectoral reallocation of resources that may result from a ‘shock’ (that is, change in the status quo) to the economy. CGE models are widely used in economic analysis of policies and projects around the world including in Australia by both government and the private sector.

Both input-output (I-O) modelling and CGE modelling have been used previously in the preparation of economic impact assessment for sporting events. However, we prefer to use CGE analysis as it provides a more robust assessment that is used and accepted by government departments, particularly Treasury departments in Australia and New Zealand. Using CGE modelling to measure economy-wide impacts is superior to simply using input-output analysis. For example, I-O models can only scale up or down industries, with no regard for economic interactions and constraints, while CGE models include these features. This means CGE models are able to more realistically capture indirect impacts such as the impact on prices through increased demand for a finite product, or the impact on cost structures of additional demand for finite labour and capital.

The core data of a CGE model is an input-output table. An input-output table is a system of accounts which shows, in value terms, the supply and disposal of goods and services within the economy in a particular year. An input-output table captures sales of products to other industries for further processing (intermediate usage) or to the various categories of final demand. It also captures the inputs used in an industry’s production, whether they be intermediate or primary inputs (such as labour and capital). The table is balanced such that total inputs to each industry are equal to total outputs from each industry. Essentially, an input-output table is a snapshot of an economy (whether it is a region, state, territory or country) in a particular year.

A CGE model attempts to ‘push forward’ the base input-output table through time by utilising a set of equations that capture neoclassical microeconomic theory to determine behaviour of economic agents (such as households, governments, industries) when they are faced with changes in key economic variables, especially relative prices. The equations are solved simultaneously, where some variables are determined by the model (endogenous variables) and some are determined outside the model (exogenous variables). The classification of endogenous and exogenous variables is determined by the user based on the set of assumptions derived for the specific modelling exercise. CGE modelling is a widely used economic impact analysis tool for simulating the economy-wide effects of projects or policies, often involving large expenditures and revenues, which represent ‘shocks’ to the economy. CGE models recognise that complex macroeconomic mechanisms and inter-industry interactions exist in the economy and, in light of this, replicate how the economy will adjust to ‘shocks’ from significant projects and policies.

We employed a static computable general equilibrium modelling to estimate indirect and total impacts of spending activities related to the ICC CWC 2015 in Australia. The economic impact assessment has been undertaken using *The Enormous Regional Model (TERM)* developed by the Centre of Policy Studies (CoPS) at Victoria University (Melbourne, Australia).

The analysis was conducted to estimate key macroeconomic variables (GDP/GSP/GRP), household consumption and employment) of the Australian national economy and eight Australian state and territory economies.

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# *CGE modelling*

Economy-wide modelling of New Zealand's national and regional economies were undertaken in a two step approach described below.

## *Modelling of New Zealand National impacts*

At the New Zealand national level, impacts were estimated using the Business and Economic Research Limited (BERL) economy-wide computable general equilibrium (CGE) model. BERL's standard CGE model identifies 53 separate production sectors, using 40 occupation (skill) types of labour input and one physical capital input as production factors. These sectors produce 25 export commodities and eight consumption commodities, demanded by domestic and overseas consumers as well as government. The domestic household sector is divided into five different income classes.

The model's database is built on the latest official Statistics New Zealand inter-industry transactions table for the 2006/07 year. This table has been updated by BERL to the 2013/14 year using national accounts totals and data from Statistics New Zealand Annual Enterprise Survey, Business Demography Statistics and other ancillary data sources.

## *Modelling of New Zealand Regional impacts*

Multiplier models for each of four regions (Auckland, Wellington, Canterbury, and the rest of New Zealand) were constructed to assess the economic impacts of the Tournament related spending. These multiplier models were constructed using 2010/11 input-output transactions matrices for these areas, which were in turn built from official Statistics New Zealand 2006/07 national input-output information, and regional data from Business Demography Statistics. Multipliers for GDP, employment and household consumption were used to estimate the indirect and total impacts at the regional level.

To ensure consistency between region and national impacts, estimates from the multiplier model for each region were used to determine each region's share of the total New Zealand impact. These results were then calibrated on an industry level to national impacts.

For example, the national impact on sector 'A' from the CGE model is allocated across each of the regions. These allocations are in line with the shares (or proportions) derived from the multiplier models' calculated impact on sector 'A' in each of the regions.

This approach ensures that the differing structures of the regional economies are reflected in regional impact estimates, while also ensuring that the total of the impacts across the four regions is equal to that estimated by the national CGE model.

# Approach used to measure benefits of the ICC CWC 2015

## Hosting the ICC Cricket World Cup 2015 generated economic benefits before, during and after the Tournament

Hosting the ICC CWC 2015 in Australia and New Zealand involved significant planning before the Tournament began and these activities generate economic benefits to the host nations.

During the Tournament, the activities related to the delivery of matches and the spending of visitors generated economic impacts to Australia and New Zealand in the form of GDP/GSP/GRP contributions and job creation across various industries through increased demand for goods and services trickled through the supply chain.

Upon Tournament completion, the benefits will endure through an increased interest and participation in cricket.

	Direct impact	Flow-on and total impact
<b>Pre-Tournament preparations</b>	<ul style="list-style-type: none"> <li>• Planning and delivery</li> <li>• Capital investment for stadium refurbishment</li> </ul>	<ul style="list-style-type: none"> <li>• Increased demand across national as well as state/territory/regional economies</li> <li>• Stimulated economy through GDP/GSP/GRP contributions and job creation</li> </ul>
<b>Delivering the ICC CWC 2015</b>	<ul style="list-style-type: none"> <li>• Ticketing revenue</li> <li>• Food and beverage revenue</li> <li>• Spending by interstate/inter-region and international tourists in local economies</li> <li>• Spending by overseas delivery partners</li> </ul>	
<b>Positive lasting benefits</b>	<ul style="list-style-type: none"> <li>• Increased interest and participation in cricket, especially in schools, communities and cricket clubs</li> <li>• Lasting tourism benefits</li> </ul>	



# Assumptions

- Our analysis of Tournament and match attendees is driven primarily by the ticketing data provided by Ticketek, the LOC and in online and face-to-face interviews.
- We also utilised information on the total allocated tickets which includes allocations to ICC, ICC partners, government stakeholders, and cricket associations, not included in Ticketek reports to determine attendance and visitor numbers.
- We applied average spend profiles by country of origin collected in our face-to-face interviews to our analysis of total visitor numbers (including home-state/home-region) to provide us with the direct economic impacts resulting from tourism.
- LOC expenditures related to accommodation, other travel, taxis and ticketing expenses were applied across states/regions. Airfare spend was applied to the state/region of destination. Other office expenditures, such as utilities and office supplies, were assumed to occur in the state/region of the head office location (Melbourne and Wellington).
- Actual LOC expenditures from 2013 to January 2015 inclusive was available for use in our analysis, and budgeted expenditures for the remainder of 2015 were applied.
- International cricket team travel and per diem expenditures were distributed across states/regions according to the duration each team spent in each location.
- Host city budgets involve the amount spent by the host cities on city dressing and marketing of the matches and the Tournament. Host city budget estimates for Australian states/territories and New Zealand regions were provided to us by the LOC.
- Total direct economic impacts represent the gross spending associated with the ICC CWC 2015, which includes local visitor activity.
- To estimate the total economic impact through economic modelling, the incremental expenditure are required and therefore excludes displacement spending – interstate/inter-region spend results in a reduction in expenditure in the visitors home state as visitors displace their home-state/home-region spend with host-state/host-region spend.



# *Appendix B*

## Detailed Australian and New Zealand results

*B*



# Total impacts of ICC Cricket World Cup 2015

The following tables show a snapshot of the total impacts of the Tournament across the two countries. The first table focuses on visitation and spending, split by level of disaggregation of visitor type (home-state/home-region, interstate/inter-region and international). The second table outlines total GDP, household consumption and employment impacts across the two countries.

	All (Home-state/home-region, interstate-inter-region and international)	Interstate/inter-region and international	International only
Match attendance	1,016,421	541,511	265,714
Tournament attendance	1,172,319	559,249	269,119
Average number of matches per unique visitor	2.0	1.9	1.8
Unique visitors to Tournament matches	595,000	295,000	145,000*
Average bed nights	3.4	5.3	7.2
Total bed nights	1,995,000	1,585,000	1,055,000
Average spend per unique visitor (AU\$, nominal)	\$1,500	\$2,710	\$2,960
Average spend per unique visitor (NZ\$, nominal)	\$1,570	\$2,850	\$3,110
Total visitor spend (AU\$, nominal)	\$850,000,000	\$780,000,000	\$415,000,000
Total visitor spend (NZ\$, nominal)	\$895,000,000	\$815,000,000	\$435,000,000

\* Includes trans-Tasman visitors (50,000)

	Impact
Total direct expenditure (AU\$)	AUS\$1,100,000,000
Total direct expenditure (NZ\$)	AUS\$1,125,000,000
Incremental expenditure (AU\$)	\$865,000,000
Incremental expenditure (NZ\$)	\$910,000,000
Total GDP impacts (AU\$2015)	\$460,000,000
Total GDP impacts (NZ\$2015)	\$480,000,000
Additional jobs created (FTE)	8,320
Total household consumption (AU\$2015)	\$330,000,000
Total household consumption (NZ\$2015)	\$350,000,000

Note: All figures are GST inclusive. Visitor numbers are rounded to the nearest 5,000; Bed night are rounded to the nearest 5,000; Average spend and FTEs are rounded to the nearest \$10; Visitor spend, Total expenditure, GDP and Household consumption are rounded to the nearest \$5,000,000. As each individual number is rounded to these denominations, totals may not sum in some instances. This includes summation of Australia and New Zealand dollar values to arrive at dual currency totals across both nations. Exchange rates have been applied as relevant averages across 2013 – 2015, sourced from the Reserve Bank of Australia. That is, expenditures incurred in 2013 have been applied at the 2013 exchange rate, and so on. 2015 exchange rates are representative of January to March only. Exchange rates used for each year are as follows: 2013: 1 AUD = 1.17 NZD, 2014: 1 AUD = 1.09 NZD, 2015: 1 AUD = 1.05 NZD.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

*Appendix C*  
Detailed Australian results  
by state/territory



# Australia

Australia enjoys economic benefits from the activities associated with the ICC CWC 2015. The following table illustrates how these impacts are distributed nationally and across the eight host states/territories, seven of which hosted ICC CWC 2015 matches. State/Territory visitor numbers represent unique visitors to that state/territory (including local visitors who attended the ICC CWC 2015). The national visitor numbers represent unique visitors to Australia, excluding individuals who travel between multiple states during their trip.

	Australia	ACT	NSW	QLD	SA	TAS	VIC	WA
<b>Matches played</b>	26	3	5	3	4	3	5	3
<b>Tournament attendance (all- home-state, interstate and international)</b>	767,948	29,304	161,419	29,784	116,434	24,829	359,803	46,377
<b>Tournament attendance (interstate and international)</b>	394,306	22,816	69,335	7,390	74,737	11,260	195,063	13,705
<b>Tournament attendance (international only)</b>	189,187	4,692	40,509	3,450	34,237	4,383	94,450	7,467
<b>Match attendance (all)</b>	685,631	25,336	142,773	19,558	103,236	21,353	332,154	41,221
<b>Match attendance (interstate and international)</b>	384,894	21,730	67,525	6,304	73,289	10,174	193,253	12,619
<b>Match attendance (international only)</b>	187,380	4,484	40,161	3,242	33,959	4,175	94,102	7,258
<b>Average number of matches per unique visitor (all- home-state, interstate and international)*</b>	2.1	1.3	1.4	1.5	1.3	1.4	1.3	1.4
<b>Average number of matches per unique visitor (interstate and international)*</b>	1.9	1.2	1.3	1.4	1.2	1.4	1.3	1.4
<b>Average number of matches per unique visitor (international only)*</b>	1.9	1.2	1.3	1.3	1.2	1.4	1.3	1.4
<b>Unique visitors to Tournament matches (all- home-state, interstate and international)**</b>	372,000	23,000	113,000	19,000	92,000	17,000	267,000	33,000
<b>Unique visitors to Tournament matches (interstate and international)**</b>	207,000	19,000	53,000	5,000	64,000	8,000	154,000	10,000
<b>Unique visitors (international only)**</b>	102,000	4,000	31,000	3,000	29,000	3,000	75,000	5,000

\* Average matches for Australia is greater than the average of the states as it represents the average number of matches attended across the whole nation, which includes multiple states

\*\* Unique visitors to Australia is less than the sum of its states and territories due to the elimination of double counting of those that attended multiple host cities

Note: Visitor numbers are rounded to the nearest 1,000. As each individual number is rounded to these denominations, totals may not sum in some instances.

Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

## Australia (cont'd)

	Australia	ACT	NSW	QLD	SA	TAS	VIC	WA
<b>Average bed nights per unique visitor (all-home-state, interstate and international)*</b>	4.0	1.2	2.3	1.6	2.8	1.6	3.1	1.4
<b>Average bed nights per unique visitor (interstate and international)*</b>	6.0	1.4	3.9	3.4	3.5	2.3	4.7	2.8
<b>Average bed nights per unique visitor (international only)*</b>	7.9	2.5	5.1	4.5	3.9	3.6	6.4	4.2
<b>Total bed nights (all- home-state, interstate and international)</b>	1,490,000	30,000	260,000	30,000	255,000	30,000	835,000	50,000
<b>Total bed nights (interstate and international)</b>	1,240,000	25,000	205,000	20,000	220,000	20,000	720,000	30,000
<b>Total bed nights (international only)</b>	815,000	10,000	160,000	10,000	115,000	10,000	485,000	25,000
<b>Average spend per unique visitor (all- home-state, interstate and international)*</b>	\$1,750	\$640	\$1,160	\$840	\$870	\$670	\$1,270	\$1,700
<b>Average spend per unique visitor (interstate and international)*</b>	\$2,530	\$630	\$1,820	\$780	\$1,180	\$1,010	\$1,980	\$2,210
<b>Average spend per unique visitor (international only)*</b>	\$3,190	\$2,240	\$2,310	\$2,210	\$1,740	\$2,200	\$2,200	\$3,080
<b>Total visitor expenditure (all- home-state, interstate and international)</b>	\$640,000,000	\$15,000,000	\$130,000,000	\$15,000,000	\$80,000,000	\$10,000,000	\$340,000,000	\$55,000,000
<b>Total visitor expenditure (interstate and international)</b>	\$520,000,000	\$10,000,000	\$95,000,000	\$5,000,000	\$75,000,000	\$10,000,000	\$305,000,000	\$20,000,000
<b>Total visitor expenditure (international only)</b>	\$325,000,000	\$10,000,000	\$70,000,000	\$5,000,000	\$50,000,000	\$5,000,000	\$165,000,000	\$15,000,000

\* Average bed nights and average spend for Australia is typically higher than the average of all states as it incorporates nights stayed/dollars spent across the whole country, that is, visitors who went to multiple states.

Note: Bed nights are rounded to the nearest 5,000; Average spend and FTEs are rounded to the nearest \$10; Visitor expenditure is rounded to the nearest \$5,000,000. As each individual number is rounded to these denominations, totals may not sum in some instances.

Source: PwC analysis based on PwC survey and ticketing data provided by the LOC.

Rounding may disproportionately affect smaller reported visitor numbers and dollar values. As some key statistics were low for the Australian Capital Territory, Queensland and Tasmania relative to other states/territories, these states/territories have been disproportionately affected by the use of a consistent rounding approach. Refer to individual state and territory breakdowns for unrounded results for these states/territories.

## Australia (cont'd)

	Australia	ACT	NSW	QLD	SA	TAS	VIC	WA
<b>Total direct expenditures</b>	\$785,000,000	\$25,000,000	\$145,000,000	\$20,000,000	\$90,000,000	\$35,000,000	\$410,000,000	\$60,000,000
<b>Incremental expenditures</b>	\$675,000,000	\$20,000,000	\$115,000,000	\$10,000,000	\$85,000,000	\$30,000,000	\$380,000,000	\$30,000,000
<b>Total GDP/GSP impacts (AU\$2015)</b>	\$350,000,000	\$15,000,000	\$85,000,000	\$35,000,000	\$30,000,000	\$5,000,000	\$150,000,000	\$25,000,000
<b>Additional jobs created (FTE)<sup>1</sup></b>	5,960	250	1,250	620	520	160	2,790	320
<b>Household consumption (AU\$2015)</b>	\$305,000,000	\$15,000,000	\$85,000,000	\$45,000,000	\$25,000,000	\$10,000,000	\$105,000,000	\$15,000,000

Note: numbers may not sum due to rounding. Total expenditure, GDP and Household consumption are rounded to the nearest \$5,000,000, FTEs are rounded to the nearest 10. As each individual number is rounded to these denominations, totals may not sum in some instances.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

Rounding may disproportionately affect smaller reported visitor numbers and dollar values. As some key statistics were low for the Australian Capital Territory, Queensland and Tasmania relative to other states/territories, these states/territories have been disproportionately affected by the use of a consistent rounding approach. Refer to individual state and territory breakdowns for unrounded results for these states/territories.

### Summary of findings

In determining the total direct expenditures of the ICC CWC 2015, data was collected from a number of sources. The total direct expenditures of \$785m represent the gross spending associated with the Tournament. However, to estimate the total economic impact through economic modelling an understanding of the incremental expenditures are required. The incremental expenditures of \$675m represent a subset of the total direct expenditures and are considered spending induced by the Tournament. Increased spending, as a result of the Tournament, created positive impacts on the economy as illustrated through economic impacts to gross domestic product (GDP), full-time equivalent jobs and household consumption. These impacts are a result of modelling the incremental expenditures into an economy-wide CGE model.

### Gross domestic product (GDP)

Economic stimulus as measured through, GDP, will flow through to suppliers through backward linkages in the supply chain. For example, food and beverage sales will create flow-on impacts to the manufacturing and agriculture sectors. As a result of the Tournament, GDP impacts are most significant in the hospitality and transport sectors, largely in part due to visitor spending on accommodation, food and beverage, merchandise and travel. Victoria felt the largest increase in GSP as a result of hosting of the ICC CWC 2015 of all the Australian states and territories. The two key drivers of this GSP impact were; international visitors, accounting for approximately a third of the total GSP impact and driving a strong increase in the hospitality industry (food service and accommodation) which had the largest value add increase of any industry in Victoria (\$71 million in 2015 alone). Queensland saw the highest economic rate of return (as measured by the ratio of GSP impact to incremental expenditure). This illustrates that suppliers in Queensland benefited the most out of all Australian states. On the other hand, Tasmania saw the lowest economic rate of return as a result of a having the lowest Tournament attendance figures coupled with one of the lowest average spend per visitor. This flowed through the supply chain resulting in disproportionately lower benefits to the accommodation and food manufacturing industries. It should be noted that unrounded estimated GSP and household consumption impacts for Tasmania were \$7.2million and \$11.4 million respectively. Similarly, South Australia also yielded lower GSP impacts relative to incremental expenditures due to relatively lower flow-on impacts as a result of low average spend per visitor.

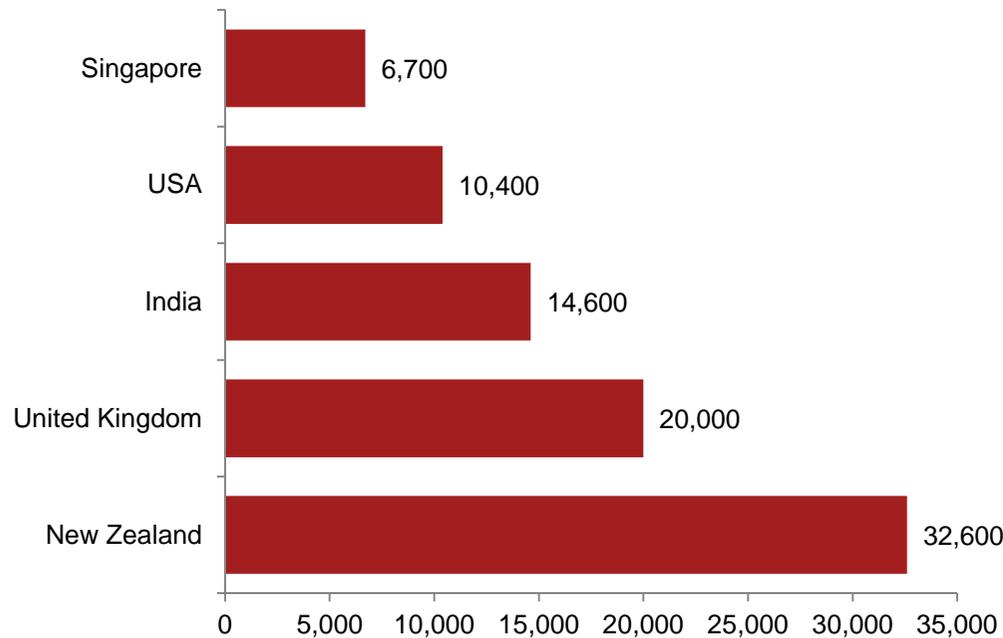
### Employment & household consumption impacts

Tournament activity also resulted in workforce increases through new full-time equivalent jobs (FTE)<sup>1</sup> in various sectors, such as, construction, retail trade, hospitality and professional services. With an increase in employment, consumption, a key measure of economic welfare, also rises. This is because household income increases with a higher level of employment, therefore allowing consumption to expand. This increase in income is higher in Australia relative to New Zealand resulting in a relatively higher impact to household consumption. To the extent that consumption can be considered as a proxy for living standards, an increase in consumption implies the Australian population is better off.

<sup>1</sup> FTE jobs are measured based on the total hours worked in a standard working week, which is assumed to be 37.5 hours.

# International visitors will generate activity throughout the economy – Australia

## Total international visitors

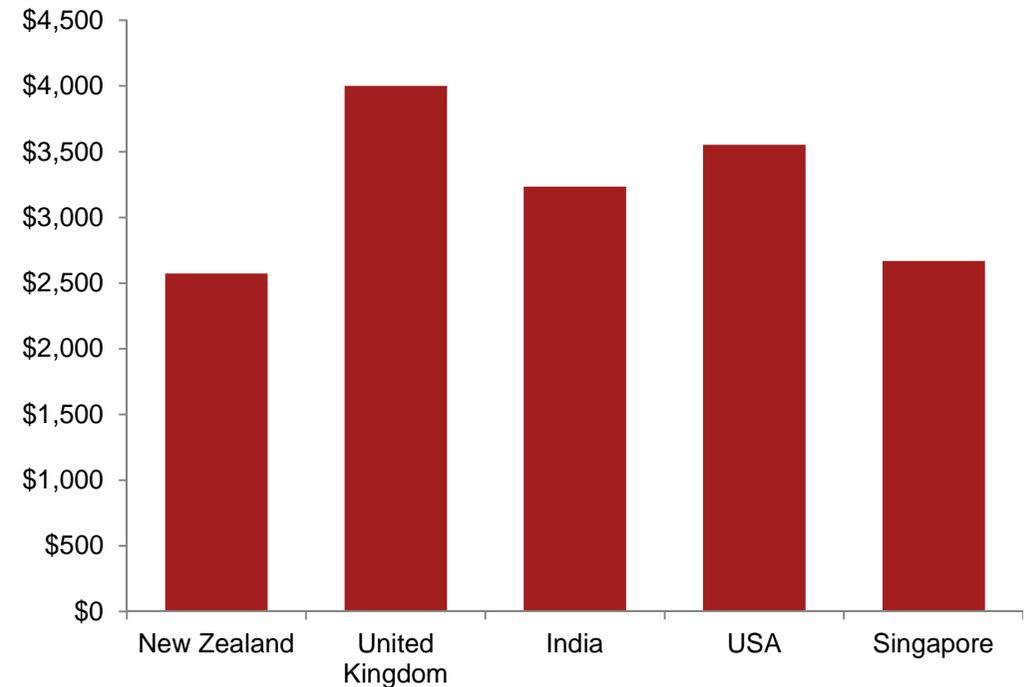


Total international visitor numbers are rounded to the nearest 100.  
Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

Aside from trans-Tasman visitors, international visitors to Australia for the ICC CWC 2015 predominately originated from the United Kingdom and India. The United States of America was also strongly represented – presumably due to the high amount of expats of cricketing nations such as India and Sri Lanka.

The following section provides state-by-state commentary and economic impact analysis.

## Average spending per person by country of origin (AU\$)



Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

Of the highest visitor origin countries to Australia, those from the United Kingdom spent the most per person (approximately AU\$4,000), largely due to the average length of stay. Visitors from India and the United Kingdom also spent significant amounts as part of their trip to Australia for the ICC CWC 2015.

# Australian Capital Territory

Manuka Oval is the premier site in the Australian Capital Territory for cricket and AFL.

The ACT Government committed the delivery of a world class experience for teams and visitors together with lighting, field of play and technology upgrades which led to Canberra being awarded three pool matches in the period from 18 February until 3 March. These matches were allocated over a ten day period to maximise visitation and leverage regional tourism opportunities. The ACT Government offered strong support to the ICC CWC 2015 including marketing support and city activations. The Fan Trail combined cricket and fan engagement activities to engage and enthuse fans on their way to matches.

Prior to the Tournament, Canberra hosted both Afghanistan and Ireland as part of a pre-Tournament acclimatisation program.

Six different teams featured in the matches in Canberra including the extremely popular Afghanistan. Competing in their first ICC Cricket World Cup the Afghanistan team were mobbed by supporters at the official Tournament welcome hosted by the ACT Government ahead of their sold out debut match against Bangladesh.

The total Tournament attendance for the three matches hosted at Manuka Oval was 29,304 including match attendance of 25,336. 16 per cent of all attendees were international visitors to Canberra for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Tournament matches</b>	
18 February	Bangladesh v Afghanistan SOLD OUT
24 February	West Indies v Zimbabwe
3 March	South Africa v Ireland

Source: LOC



# Australian Capital Territory

	All (Home-state, interstate and international)	Interstate and international	International only
Tournament attendance	29,304	22,816	4,692
Match attendance	25,336	21,730	4,484
Average number of matches per unique visitor	1.3	1.2	1.2
Unique visitors to Tournament matches	23,000	19,000	4,000
Average bed nights	1.2	1.4	2.5
Total bed nights	30,000	25,000	10,000
Average spend per unique visitor (AU\$, nominal)	\$640	\$630	\$2,240
Total visitor spend (AU\$, nominal)	\$15,000,000	\$10,000,000	\$10,000,000

	Impact
Total direct expenditures	\$25,000,000
Total GSP impacts (AU\$2015)	\$15,000,000
Additional jobs created (FTE)	250
Total household consumption (AU\$2015)	\$15,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.  
Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

Rounding may disproportionately affect smaller reported visitor numbers and dollar values. As some of the Australian Capital Territory's estimated key statistics were low relative to other states, these have been disproportionately affected by the use of a consistent rounding approach. Actual estimated values of the Australian Capital Territory's key statistics were as follows:

- Unique visitors to Tournament matches: **22,841** (home-state, interstate, and international); **19,497** (interstate and international); **3,774** (international only)
- Total visitor spend: **\$13.654 million** (home-state, interstate, and international); **\$12.359 million** (interstate and international); **\$8.452 million** (international only)
- Total GSP impacts: **\$15.774 million**

# New South Wales

New South Wales embraced the truly global nature of the ICC Cricket World Cup and leveraged opportunities for business, tourism and community engagement.

Kick starting the Tournament, Sydney hosted six teams playing warm up matches at the SCG and Blacktown International Sports Park and provided a key hub for pre-tournament media, broadcast and ICC activities. The Bangladesh matches were embraced by the local communities in Western Sydney, which exemplified the cultural celebration that is cricket.

New South Wales provided a vibrant, inclusive, world class experience for fans, competitors and officials of the Tournament. Significant resources were committed to ensure that all activities leveraged their core aim to deliver tourism and exposure to the state. This was evident in the delivery of: the most extensive city dressing program of any host city of the Tournament; promotions and advertising across NSW and Victoria; a cricket legacy program ; a robust and compelling fan engagement program; and free public transport for fans and volunteers.

The total Tournament attendance for the matches hosted at the Sydney Cricket Ground (excluding warm up matches) was 161,419 including match attendance of 142,773. 25 per cent of all attendees were international visitors to Sydney for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Warm up matches</b>	
9 February	England v West Indies (SCG) Pakistan v Bangladesh (BISP)
10 February	Ireland v Scotland (BISP)
11 February	England v Pakistan (SCG)
12 February	West Indies v Scotland (SCG) Bangladesh v Ireland (BISP)
<b>Tournament matches</b>	
27 February	South Africa v West Indies
8 March	Australia v Sri Lanka SOLD OUT
13 March	England v Afghanistan
18 March	Sri Lanka v South Africa (Q/F)
27 March	Australia v India (S/F) SOLD OUT

Source: LOC



# New South Wales

	All (Home-state, interstate and international)	Interstate and international	International only
<b>Tournament attendance</b>	161,419	69,335	40,509
<b>Match attendance</b>	142,773	67,525	40,161
<b>Average number of matches per unique visitor</b>	1.4	1.3	1.3
<b>Unique visitors to Tournament matches</b>	113,000	53,000	31,000
<b>Average bed nights</b>	2.3	3.9	5.1
<b>Total bed nights</b>	260,000	205,000	160,000
<b>Average spend per unique visitor (AU\$, nominal)</b>	\$1,160	\$1,820	\$2,310
<b>Total visitor spend (AU\$, nominal)</b>	\$130,000,000	\$95,000,000	\$70,000,000

	Impact
<b>Total direct expenditures</b>	\$145,000,000
<b>Total GSP impacts (AU\$2015)</b>	\$85,000,000
<b>Additional jobs created (FTE)</b>	1,250
<b>Total household consumption (AU\$2015)</b>	\$85,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Queensland

The Gabba hosted three pool matches. The allocated matches were scheduled within a nine day period to maximise opportunities for visitation to Queensland and to leverage tourism in the region.

Supported by the Cricket Australia 'Go Gold' initiative, the Australian Team Celebration in Queen Street Mall provided locals and visitors the once in a lifetime opportunity to get up close and welcome the stars of Australian Cricket.

The LOC's hospitality program provided the ideal opportunity for Trade Investment Queensland to leverage the Cricket World Cup with key business partners across a wide range of industries.

Prior to the Tournament, the Department of Foreign Affairs and Trade hosted a Sports International Media Visit to Queensland. This visit featured sports Diplomacy Participants included representatives from the Caribbean, India, Malaysia, Pakistan, South Africa, Sri Lanka and the United Kingdom. In addition Queensland hosted both Scotland and Ireland as part of a pre-Tournament acclimatisation program.

The total ticket sales for the three Tournament matches in Queensland was 46,755 tickets. This represented an average of 15,585 tickets per match at the Gabba. It includes the Australia v Bangladesh match abandoned due to weather.

The total Tournament attendance for the three matches hosted at the Gabba was 29,784 including match attendance of 19,558. 12 per cent of all attendees were international visitors to Brisbane for the purposes of attending the ICC CWC 2015.

Brisbane hosted six of the 14 participating teams.

Date	Match
<b>Tournament matches</b>	
21 February	Australia v Bangladesh (MATCH ADBANDONED)
25 February	Ireland v United Arab Emirates
1 March	Pakistan v Zimbabwe



# Queensland

	All (Home-state, interstate and international)	Interstate and international	International only
Tournament attendance	29,784	7,390	3,450
Match attendance	19,558	6,304	3,242
Average number of matches per unique visitor	1.5	1.4	1.3
Unique visitors to Tournament matches	19,000	5,000	3,000
Average bed nights	1.6	3.4	4.5
Total bed nights	30,000	20,000	10,000
Average spend per unique visitor (AU\$, nominal)	\$840	\$780	\$2,210
Total visitor spend (AU\$, nominal)	\$15,000,000	\$5,000,000	\$5,000,000

	Impact
Total direct expenditures	\$20,000,000
Total GSP impacts (AU\$2015)	\$35,000,000
Additional jobs created (FTE)	620
Total household consumption (AU\$2015)	\$45,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Attendance figures are not rounded, as they are not estimated; Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.  
Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

Rounding may disproportionately affect smaller reported visitor numbers and dollar values. As some of Queensland's estimated key statistics were low relative to other states, these have been disproportionately affected by the use of a consistent rounding approach. Actual estimated values of Queensland key statistics were as follows:

- Unique visitors to Tournament matches: **19,453** (home-state, interstate, and international); **5,465** (interstate and international); **2,733** (international only)
- Total visitor spend: **\$15.319 million** (home-state, interstate, and international); **\$4.280 million** (interstate and international); **\$6.044 million** (international only)
- Total GSP impacts: **\$35.377 million**

# South Australia

The South Australian Government actively worked in partnership with the South Australian Cricket Association and South Australian Tourism Commission to deliver a world class event experience for Cricket World Cup visitors and contributed significant marketing and support through a range of initiatives and events to realise this vision. South Australia and ICC partners alike concentrated events around the India v Pakistan match with the South Australian Tourism Commission running a three day business forum run and ICC Travel hosting events including a dinner the night before the match and a tour of the Bradman Museum.

The celebration of cricket kicked off with the Indian Team Celebration in the Official Fan Zone at Adelaide Oval where hundreds of enthusiastic fans had the once in a lifetime opportunity to get up close and welcome the stars of Indian Cricket. Adelaide Oval hosted India three times with the team based there longer than any other Host City.

On Match days the forecourt of Adelaide Oval was converted into the official ICC CWC 2015 Fan Zone, a vibrant atmosphere which featured live entertainment, face painting and interactive activities appealing to fans of all ages.

The total Tournament attendance for the matches hosted at the Adelaide Oval (excluding warm up matches) was 116,434 including match attendance of 103,236. 29 per cent of all attendees were international visitors to Adelaide for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Warm up matches</b>	
9 February	Australia v India
10 February	India v Afghanistan
<b>Tournament matches</b>	
15 February	India v Pakistan SOLD OUT
9 March	England v Bangladesh
15 March	Pakistan v Ireland
20 March	Australia v Pakistan (Q/F)

Source: LOC



# South Australia

	All (Home-state, interstate and international)	Interstate and international	International only
<b>Tournament attendance</b>	116,434	74,737	34,237
<b>Match attendance</b>	103,236	73,289	33,959
<b>Average number of matches per unique visitor</b>	1.3	1.2	1.2
<b>Unique visitors to Tournament matches</b>	92,000	64,000	29,000
<b>Average bed nights</b>	2.8	3.5	3.9
<b>Total bed nights</b>	255,000	220,000	115,000
<b>Average spend per unique visitor (AU\$, nominal)</b>	\$870	\$1,180	\$1,1740
<b>Total visitor spend (AU\$, nominal)</b>	\$80,000,000	\$75,000,000	\$50,000,000

	Impact
<b>Total direct expenditures</b>	\$90,000,000
<b>Total GSP impacts (AU\$2015)</b>	\$30,000,000
<b>Additional jobs created (FTE)</b>	520
<b>Total household consumption (AU\$2015)</b>	\$25,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Tasmania

A refurbished Bellerive Oval hosted three Tournament matches in the period from 7 March until 14 March. The allocated matches were scheduled within an eight day period, including two weekends, to maximise opportunities for visitation to Tasmania.

The Tasmanian Government offered strong support to the ICC CWC 2015 including marketing support, city activations and transport services. A complementary advertising campaign 'Catch the Fever' was created by Government targeted at mainland travellers.

Media and Broadcaster functions held during the Tournament were well supported. A highlight of the Tournament celebrations were the ICC Cricket World Cup branded yachts racing in the harbour, and a number of functions hosted by the Tasmanian Government including a Government House Reception for the Scottish Team.

Five different teams featured in the matches in Hobart.

The total Tournament attendance for the three matches hosted at Bellerive Oval including the rain affected match featuring Australia was 24,829 of which the match attendance was 21,353. 18 per cent of all attendees were international visitors to Hobart for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Tournament matches</b>	
7 March	Zimbabwe v Ireland
11 March	Sri Lanka v Scotland
14 March	Australia v Scotland

Source: LOC



# Tasmania

	All (Home-state, interstate and international)	Interstate and international	International only
Tournament attendance	24,829	11,260	4,383
Match attendance	21,353	10,174	4,175
Average number of matches per unique visitor	1.4	1.4	1.4
Unique visitors to Tournament matches	17,000	8,000	3,000
Average bed nights	1.6	2.3	3.6
Total bed nights	30,000	20,000	10,000
Average spend per unique visitor (AU\$, nominal)	\$670	\$1,010	\$2,200
Total visitor spend (AU\$, nominal)	\$10,000,000	\$10,000,000	\$5,000,000

	Impact
Total direct expenditures	\$35,000,000
Total GSP impacts (AU\$2015)	\$5,000,000*
Additional jobs created (FTE)	160
Total household consumption (AU\$2015)	\$10,000,000*

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

Rounding may disproportionately affect smaller reported visitor numbers and dollar values. As some of Tasmania's estimated key statistics were low relative to other states, these have been disproportionately affected by the use of a consistent rounding approach. Actual estimated values of Tasmania's key statistics were as follows:

- Unique visitors to Tournament matches: **17,341** (home-state, interstate, and international); **8,095** (interstate and international); **3,098** (international only)
- Total visitor spend: **\$10.744 million** (home-state, interstate, and international); **\$8.166 million** (interstate and international); **\$6.832 million** (international only)
- Total GSP impacts: **\$7.198 million**

# Victoria

Melbourne hosted a spectacular Opening Event at the Sidney Myer Music Bowl for a crowd of 10,000 and a global TV audience of millions. The Melbourne Cricket Ground hosted five matches including the Tournament Final.

The Victorian Government contributed significant marketing and support through a range of special events to create a world class event experience for Cricket World Cup visitors including teams, media and ICC officials. Destination marketing initiatives, including billboards in Sydney and Auckland, translated into good interstate and international visitation with almost half of the attendees from interstate or overseas.

International visitors and local Victorian cricket fans were also provided with the opportunity to watch warm up matches for free in the lead up to the Tournament, one of which featured the Australian team.

Birrarung Mar was converted into the official ICC CWC 2015 Fan Zone which included 'backyard cricket' and 'beach cricket' zones appealing to fans of all ages.

The total Tournament attendance for the matches hosted at the Melbourne Cricket Ground (excluding warm up matches) was 359,803 including match attendance of 332,154. 26 per cent of all attendees were international visitors to Melbourne for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Warm up matches</b>	
11 February	Australia v United Arab Emirates
13 February	Afghanistan v United Arab Emirates (Junction Oval)
<b>Tournament matches</b>	
14 February	Australia v England SOLD OUT
22 February	South Africa v India SOLD OUT
26 February	Sri Lanka v Bangladesh
19 March	India v Bangladesh (Q/F)
29 March	Australia v New Zealand (F) SOLD OUT



# Victoria

	All (Home-state, interstate and international)	Interstate and international	International only
<b>Tournament attendance</b>	359,803	195,063	94,450
<b>Match attendance</b>	332,154	193,253	94,102
<b>Average number of matches per unique visitor</b>	1.3	1.3	1.3
<b>Unique visitors to Tournament matches</b>	267,000	154,000	75,000
<b>Average bed nights</b>	3.1	4.7	6.4
<b>Total bed nights</b>	835,000	720,000	485,000
<b>Average spend per unique visitor (AU\$, nominal)</b>	\$1,270	\$1,980	\$2,200
<b>Total visitor spend (AU\$, nominal)</b>	\$340,000,000	\$305,000,000	\$165,000,000

	Impact
<b>Total direct expenditures</b>	\$410,000,000
<b>Total GSP impacts (AU\$2015)</b>	\$150,000,000
<b>Additional jobs created (FTE)</b>	2,790
<b>Total household consumption (AU\$2015)</b>	\$105,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Western Australia

In total three matches were allocated to Western Australia including two Indian matches. The allocated matches were strategically scheduled to provide a suite of matches over a one week period to maximise visitation to Perth and leverage tourism opportunities in the state.

The Western Australian Government committed funding to provide capital improvements to the WACA for Media and Broadcast facilities. This played a key role in securing two matches featuring India.

Business and industry conferences were held in Perth in the lead up to the Tournament driving local, interstate and international interest in the event and visitation to Western Australia. The Government ran an international business program in conjunction with the Australian Government’s Match Australia program, targeting Indian businesses. In addition Western Australia hosted the United Arab Emirates as part of a pre-Tournament acclimatisation program.

Engagement with the Indian, Afghanistan and West Indian communities in Perth and surrounds provided a significant interest in matches they played and have provided a legacy for multicultural relationships in Western Australia.

Five different teams featured in the matches in Perth including India. The India v West Indies match was sold out and was among the top five most watched matches throughout the Tournament.

The total Tournament attendance for the three matches hosted at the WACA was 46,377 including match attendance of 41,221. 16 per cent of all attendees were international visitors to Perth for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Tournament matches</b>	
28 February	India v United Arab Emirates
4 March	Australia v Afghanistan
6 March	India v West Indies SOLD OUT

Source: LOC



# Western Australia

	All (Home-state, interstate and international)	Interstate and international	International only
<b>Tournament attendance</b>	46,377	13,705	7,467
<b>Match attendance</b>	41,221	12,619	7,258
<b>Average number of matches per unique visitor</b>	1.4	1.4	1.4
<b>Unique visitors to Tournament matches</b>	33,000	10,000	5,000
<b>Average bed nights</b>	1.4	2.8	4.2
<b>Total bed nights</b>	50,000	30,000	25,000
<b>Average spend per unique visitor (AU\$, nominal)</b>	\$1,700	\$2,210	\$3,080
<b>Total visitor spend (AU\$, nominal)</b>	\$55,000,000	\$20,000,000	\$15,000,000

	Impact
<b>Total direct expenditures</b>	\$60,000,000
<b>Total GSP impacts (AU\$2015)</b>	\$25,000,000
<b>Additional jobs created (FTE)</b>	320
<b>Total household consumption (AU\$2015)</b>	\$15,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GSP impacts and household consumption are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# *Appendix D*

Detailed New Zealand results  
by key regions



# New Zealand

New Zealand enjoys economic benefits from the activities associated with the ICC CWC 2015. The following table illustrates how these impacts are distributed nationally, across three key regions (Auckland, Canterbury and Wellington) and the rest of New Zealand. Regional visitor numbers represent unique visitors to that region (including local visitors who attended the ICC CWC 2015). The National visitor numbers represent unique visitors to New Zealand, excluding individuals who travel between multiple Regions during their trip.

	New Zealand	Auckland	Canterbury	Wellington	Rest of NZ
<b>Matches played</b>	23	4	3	4	12
<b>Tournament attendance (all- home-region, inter-region and international)</b>	404,371	151,677	49,218	96,797	106,679
<b>Tournament attendance (inter-region and international)</b>	164,943	62,844	18,621	45,637	37,841
<b>Tournament attendance (international only)</b>	79,932	33,820	9,594	19,898	16,620
<b>Match attendance (all- home-region, inter-region and international)</b>	330,790	134,358	42,362	85,143	68,927
<b>Match attendance (inter-region and international)</b>	156,617	61,396	17,535	44,189	33,497
<b>Match attendance (international only)</b>	78,333	33,542	9,386	19,620	15,786
<b>Average number of matches per unique visitor (all- home-region, inter-region and international)*</b>	1.8	1.4	1.4	1.5	1.6
<b>Average number of matches per unique visitor (inter-region and international)*</b>	1.9	1.3	1.3	1.4	1.2
<b>Average number of matches per unique visitor (international only)*</b>	1.8	1.3	1.3	1.4	1.2
<b>Unique visitors to Tournament matches (all- home-region, inter-region and international)**</b>	225,000	110,000	40,000	60,000	70,000
<b>Unique visitors to Tournament matches (inter-region and international)**</b>	90,000	50,000	10,000	30,000	30,000
<b>Unique visitors (international only)**</b>	45,000	30,000	10,000	10,000	10,000

\* Average matches for New Zealand is greater than the average of the states as it represents the average number of matches attended across the whole nation, which includes multiple regions

\*\* Unique visitors to New Zealand is less than the sum of its regions due to the elimination of double counting of those that attended multiple host cities.

Note: Visitor numbers are rounded to the nearest 1,000. As each individual number is rounded to these denominations, totals may not sum in some instances.

## New Zealand (cont'd)

	New Zealand	Auckland	Canterbury	Wellington	Rest of NZ
<b>Average bed nights per unique visitor (all- home-region, inter-region and international)*</b>	2.3	2.2	1.6	1.9	1.4
<b>Average bed nights per unique visitor (inter-region and international)*</b>	3.9	3.1	2.9	2.7	2.1
<b>Average bed nights per unique visitor (international only)*</b>	5.4	4.2	3.7	3.6	3.3
<b>Total bed nights (all)</b>	505,000	240,000	55,000	120,000	90,000
<b>Total bed nights (inter-region and international)</b>	345,000	150,000	40,000	90,000	65,000
<b>Total bed nights (international only)</b>	240,000	110,000	30,000	55,000	45,000
<b>Average spend per unique visitor (all)*</b>	\$990	\$930	\$900	\$810	\$590
<b>Average spend per unique visitor (inter-region and international)*</b>	\$1,570	\$1,100	\$1,160	\$1,100	\$1,080
<b>Average spend per unique visitor (international only)*</b>	\$1,960	\$1,320	\$1,380	\$1,520	\$1,300
<b>Total visitor expenditure (all)</b>	\$210,000,000	\$95,000,000	\$30,000,000	\$50,000,000	\$35,000,000
<b>Total visitor expenditure (inter-region and international)</b>	\$130,000,000	\$50,000,000	\$15,000,000	\$35,000,000	\$30,000,000
<b>Total visitor expenditure (international only)</b>	\$75,000,000	\$30,000,000	\$10,000,000	\$20,000,000	\$15,000,000

\* Average bed nights and average spend for New Zealand is typically higher than the average of all regions as it incorporates nights stayed/dollars spent across the whole country, that is, visitors who went to multiple states.

Note: numbers may not sum due to rounding. Bed night are rounded to the nearest 5,000; Average spend and FTEs are rounded to the nearest \$10; Visitor expenditure is rounded to the nearest \$5,000,000. As each individual number is rounded to these denominations, totals may not sum in some instances.

Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

## New Zealand (cont'd)

	New Zealand	Auckland	Canterbury	Wellington	Rest of NZ
<b>Total direct expenditures</b>	\$295,000,000	\$105,000,000	\$35,000,000	\$90,000,000	\$55,000,000
<b>Incremental expenditures</b>	\$200,000,000	\$55,000,000	\$20,000,000	\$75,000,000	\$50,000,000
<b>Total GDP/GRP impacts (NZ\$2015)</b>	\$110,000,000	\$35,000,000	\$15,000,000	\$40,000,000	\$25,000,000
<b>Additional jobs created (FTE)</b>	2,360	640	300	700	710
<b>Household consumption (NZ\$2015)</b>	\$30,000,000	\$9,000,000	\$6,000,000	\$10,000,000	\$5,000,000

Note: numbers may not sum due to rounding. Total expenditure and GDP are rounded to the nearest \$5,000,000, Household consumption is rounded to the nearest \$1,000,000; FTEs are rounded to the nearest 10. As each individual number is rounded to these denominations, totals may not sum in some instances.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

### Summary of findings

In determining the total direct expenditures of the ICC CWC 2015, data was collected from a number of sources. The total direct expenditures of \$295m represent the gross spending associated with the Tournament. However, to estimate the total economic impact through economic modelling an understanding of the incremental expenditures are required. The incremental expenditures of \$200m represent a subset of the total direct expenditures and are spending induced by the Tournament. Increased spending, as a result of the Tournament, created positive impacts on the economy as illustrated through economic impacts to gross domestic product (GDP), full-time equivalent jobs and household consumption. These impacts are a result of modelling the incremental expenditures into an economy-wide CGE model.

#### Gross domestic product (GDP)

Economic stimulus as measured through, GDP, will flow through to suppliers through backward linkages in the supply chain. For example, food and beverage sales will create flow-on impacts to the manufacturing and agriculture sectors. As a result of the Tournament, GDP impacts are most significant in the hospitality and transport sectors, largely in part due to visitor spending on accommodation, food and beverage, merchandise and travel. Wellington felt the largest increase in GRP of all the New Zealand regions. The key driver of this GRP impact was being a centre for LOC administrative spending which contributed to Wellington GRP impact across all three years of interest (2013-2015) and influenced increases in value add and employment in non-professional services. Canterbury saw the highest economic rate of return (as measured by the ratio of GRP impact to incremental expenditure). This illustrates that suppliers in Canterbury benefited the most out of all New Zealand regions.

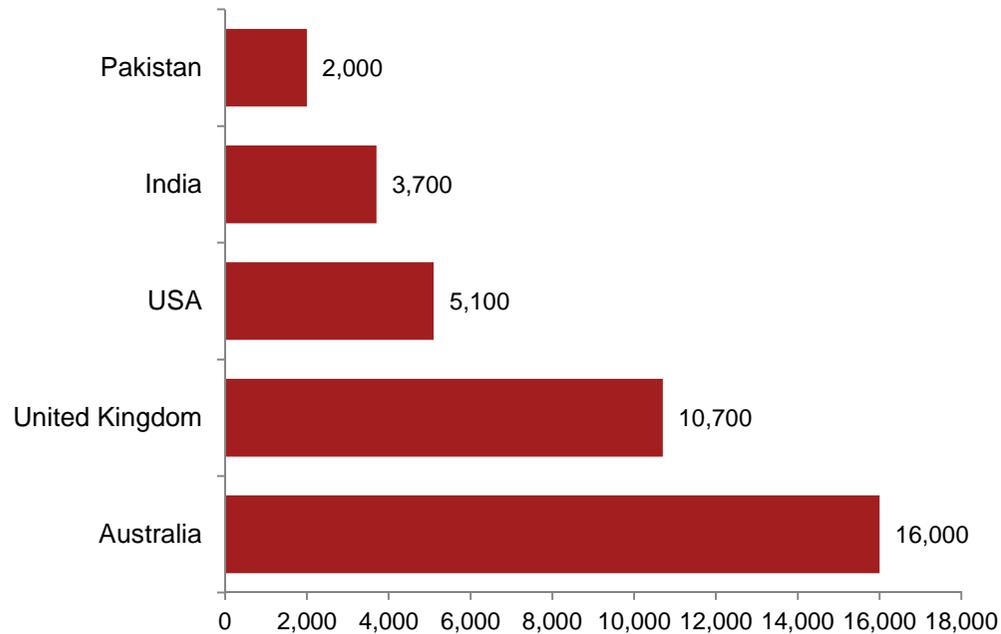
#### Employment & household consumption impacts

Tournament activity also resulted in workforce increases through new full time equivalent jobs (FTE)<sup>1</sup> in various sectors, such as, retail trade, hospitality and professional services. With an increase in employment, consumption, a key measure of economic welfare, also rises. This is because household income increases with a higher level of employment, therefore allowing consumption to expand. This increase in income is higher in Australia relative to New Zealand resulting in a relatively higher impact to household consumption. To the extent that consumption can be considered as a proxy for living standards, an increase in consumption implies the New Zealand population is better off.

<sup>1</sup> FTE jobs are measured based on the total hours worked in a standard working week, which is assumed to be 37.5 hours.

# International visitors will generate activity throughout the economy – New Zealand

## Total international visitors

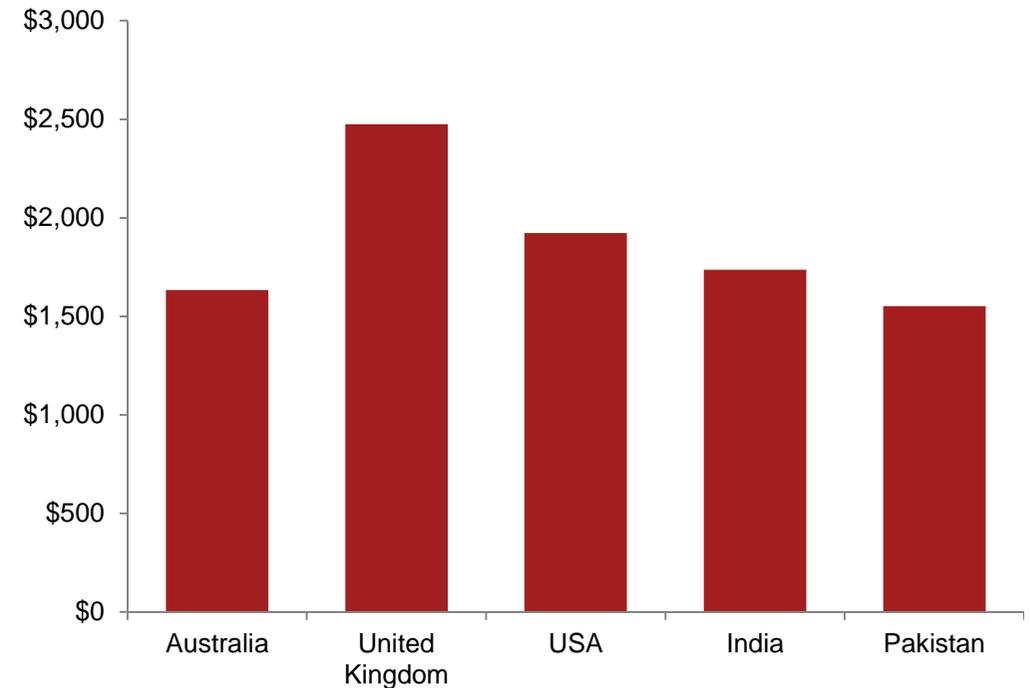


Total international visitor numbers are rounded to the nearest 100.  
Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

Aside from trans-Tasman visitors, international visitors to New Zealand for the ICC CWC 2015 predominately originated from the United Kingdom. India and Pakistan were also strongly represented, however were exceeded by the United States of America – presumably due to the high amount of expats of cricketing nations such as India and Sri Lanka.

The following section provides region-by-region commentary and economic impact analysis.

## Average spending per person by country of origin (NZ\$)



Source: PwC analysis based on PwC survey and ticketing data provided by the LOC

Of the highest visitation countries to New Zealand, those from the United Kingdom spent the most per person (approximately NZ\$2,470), largely due to long average stays. India and Pakistan were slightly below the international average, driven by low accommodation and food and beverage amounts. This suggests that typical Indian and Pakistani visitors tend to stay with friends and relatives, and presumably bring food to the matches.

# Auckland

Eden Park hosted four Tournament matches, two of which were sold out.

A number of Tournament inspired business and tourism events were held on the Auckland waterfront throughout the Tournament. The city also hosted a Trans-Tasman Gala Dinner on the eve of the Australia-New Zealand match, which saw significant political, business, community and sporting attendance, including the Prime Ministers of New Zealand and Australia, and the Captains of the 1992 and 2015 New Zealand and Australia Cricket World Cup teams.

Auckland ran a well patronised Fanzone which was held at Takutai Square and ran for the whole of the Tournament, broadcasting all the matches. A Fan Trail ran from the Fanzone to the Eden Park for the pool round matches. This was enhanced by dressing, entertainment, music parades and giveaways, themed around the teams playing. The Fan Zone and Fan Trail were embraced by the multi-cultural communities of Auckland and highlighted the diversity and inclusive of the city.

Auckland provided a Team Celebration event for the New Zealand Team. The event comprised a traditional Maori welcome at Takutai Square followed by a signing session for the fans.

The total attendance at the four matches hosted at Eden Park was 151,677 including match attendance of 134,358. 22per cent of all attendees were international visitors to Auckland for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Tournament matches</b>	
28 February	Australia v New Zealand <b>SOLD OUT</b>
7 March	South Africa v Pakistan (Rain affected)
14 March	India v Zimbabwe
24 March	New Zealand v South Africa <b>SOLD OUT</b>

Source: LOC



# Auckland

	All (Home-region, interstate and international)	Inter-region and international	International only
<b>Tournament attendance</b>	151,677	62,844	33,820
<b>Match attendance</b>	134,358	61,396	33,542
<b>Average number of matches per unique visitor</b>	1.4	1.3	1.3
<b>Unique visitors to Tournament matches</b>	110,000	50,000	30,000
<b>Average bed nights</b>	2.2	3.1	4.2
<b>Total bed nights</b>	240,000	150,000	110,000
<b>Average spend per unique visitor (NZ\$, nominal)</b>	\$930	\$1,100	\$1,320
<b>Total visitor spend (NZ\$, nominal)</b>	\$95,000,000	\$50,000,000	\$30,000,000

	Impact
<b>Total direct expenditures</b>	\$105,000,000
<b>Total GRP impacts (NZ\$2015)</b>	\$35,000,000
<b>Additional jobs created (FTE)</b>	640
<b>Total household consumption (NZ\$2015)</b>	\$9,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GRP impacts are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10; household consumption is rounded to the nearest \$1,000,000.  
Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Canterbury

Christchurch played host to three matches of the ICC Cricket World Cup 2015, as well as hosting four Tournament warm up matches. As host of the sold out opening match of the Tournament and with a new home for international cricket, Christchurch played a key role in launching the Tournament. The city showcased its continued rejuvenation since the earthquakes of 2010 and 2011.

Christchurch also hosted an opening ceremony attended by in excess of 60,000 fans and broadcast internationally.

During the Tournament Christchurch delivered a village green based Fanzone at Victoria Square providing a big screen, live entertainment, concerts, a licensed bar area, food stalls and lighting installations. A Fan Trail on match days was dressed in ICC CWC 2015 themed items, with entertainment along the way, including music, bands, buskers, entertainers and dancing flash mobs.

The official Tournament welcome for Pakistan was held in Christchurch.

Christchurch was also the base of the 2014 ICC Cricket World Cup Qualifying Tournament, with the city and surrounding towns hosting a number of teams and matches in the final qualification phase, including the final between Scotland and the United Arab Emirates.

The total attendance at the three matches hosted at Hagley Oval was 49,218 including match attendance of 42,362. 19 per cent of all attendees were international visitors to Christchurch for the purposes of attending the ICC Cricket World Cup 2015.

Date	Match
<b>Warm up matches</b>	
9 February	South Africa v Sri Lanka (Hagley) New Zealand v Zimbabwe (Lincoln)
11 February	South Africa v New Zealand (Hagley) Sri Lanka v Zimbabwe (Lincoln)
<b>Tournament matches</b>	
14 February	Sri Lanka v New Zealand <b>SOLD OUT</b>
21 February	Pakistan v West Indies
23 February	England v Scotland



# Canterbury

	All	Interstate and international	International only
<b>Tournament attendance</b>	49,218	18,621	9,594
<b>Match attendance</b>	42,362	17,535	9,386
<b>Average number of matches per unique visitor</b>	1.4	1.3	1.3
<b>Unique visitors to Tournament matches</b>	40,000	10,000	10,000
<b>Average bed nights</b>	1.6	2.9	3.7
<b>Total bed nights</b>	55,000	40,000	30,000
<b>Average spend per unique visitor (NZ\$, nominal)</b>	\$900	\$1,160	\$1,380
<b>Total visitor spend (NZ\$, nominal)</b>	\$30,000,000	\$15,000,000	\$10,000,000

	Impact
<b>Total direct expenditures</b>	\$35,000,000
<b>Total GRP impacts (NZ\$2015)</b>	\$15,000,000
<b>Additional jobs created (FTE)</b>	300
<b>Total household consumption (NZ\$2015)</b>	\$6,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GRP impacts are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10; household consumption is rounded to the nearest \$1,000,000.  
 Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Wellington

The Wellington Regional Stadium played host to four matches of the ICC CWC 2015, three pool matches and a quarter final. The two matches involving New Zealand, a pool match and their quarter final were sell outs. The quarter final provided the highlight of Martin Guptil scoring the highest ever score in a Cricket World Cup.

Wellington ran a village green fan hub at Civic Square with a wide range of activities including cricket skills games, a backyard cricket tournament and an evening film series. On match day the hub was the starting point for the fan trail with face painting and merchandise available for fans on their way to the match.

The fan trail ran across the City to Sea Bridge, along the waterfront, along the Fran Wilde walkway to the Wellington Regional Stadium. In addition to the fan hub the Council provided put on free concerts and a large fireworks display on the eve of the Quarter Final.

The city and the stadium were awash in bunting, Tournament signage and banners as the city embraced the Tournament.

Wellington provided a team celebration for the England team. The event was a formal powhiri at Te Wharewaka, followed by a public autograph session.

The total attendance at the four matches hosted at Wellington Regional Stadium was 96,797 including match attendance of 85,143. 21 per cent of all attendees were international visitors to Wellington for the purposes of attending the ICC CWC 2015.

Date	Match
<b>Tournament matches</b>	
20 February	New Zealand v England SOLD OUT
1 March	England v Sri Lanka
12 March	South Africa v United Arab Emirates
21 March	New Zealand v West Indies SOLD OUT

Source: LOC



# Wellington

	All	Interstate and international	International only
<b>Tournament attendance</b>	96,797	45,637	19,898
<b>Match attendance</b>	85,143	44,189	19,620
<b>Average number of matches per unique visitor</b>	1.5	1.4	1.4
<b>Unique visitors to Tournament matches</b>	60,000	30,000	10,000
<b>Average bed nights</b>	1.9	2.7	3.6
<b>Total bed nights</b>	120,000	90,000	55,000
<b>Average spend per unique visitor (NZ\$, nominal)</b>	\$810	\$1,100	\$1,520
<b>Total visitor spend (NZ\$, nominal)</b>	\$50,000,000	\$35,000,000	\$20,000,000

	Impact
<b>Total direct expenditures</b>	\$90,000,000
<b>Total GRP impacts (NZ\$2015)</b>	\$40,000,000
<b>Additional jobs created (FTE)</b>	700
<b>Total household consumption (NZ\$2015)</b>	\$10,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GRP impacts are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10; household consumption is rounded to the nearest \$1,000,000.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

# Dunedin

Dunedin played host to three ICC Cricket World Cup matches, two of which were sold out. The second sold out match Afghanistan v Scotland proved to be a thrilling one with Afghanistan, playing in their first ever ICC Cricket World Cup, recording their first ever win.

Dunedin provided a Team celebration for Scotland that included a public welcome.

Dunedin provided a Fanzone in the Octagon as a hub of entertainment and activity on match days. The area was themed with food, music, flags and colours of competing countries as well as outstanding flavours and the culture of New Zealand and Dunedin's multi ethnic communities.

Dunedin also set up a Fan Activation area adjacent to the match venue. Visitors were welcomed with roving entertainers, music, food stalls and the colours of the countries.

Dunedin provided a fan trail from the central city to University Oval for fans to walk on match day.

Date	Match
<b>Tournament matches</b>	
17 February	New Zealand v Scotland <b>SOLD OUT</b>
22 February	Sri Lanka v Afghanistan
26 February	Afghanistan v Scotland <b>SOLD OUT</b>

Source: LOC



# Hamilton

Hamilton played host to three matches during the ICC Cricket World Cup. All were sold out.

Hamilton ran a popular family ‘fun zone’ on match day providing a place for families to visit prior to the game. The fun zone included cricket themed activity, food stalls, face painting and entertainment prior to match start. It was also the start to the Fan Trail to Seddon Park which was enhanced by dressing and way finding.

Hamilton hosted two Team Celebrations, Ireland and Zimbabwe. Both team celebrations followed a similar format with an invite only ceremony with a Maori welcome, a Kapa Haka group and speeches from Mayor and Team, followed by a public opportunity for the team to interact with local and visiting fans.

The city, in conjunction with government, hosted an event for visiting media and broadcasters at Hobbiton, a key filming location of the Lord of the Rings franchise, which received global media attention.

Date	Match
<b>Tournament matches</b>	
15 February	South Africa v Zimbabwe <b>SOLD OUT</b>
10 March	India v Ireland <b>SOLD OUT</b>
13 March	Bangladesh v New Zealand <b>SOLD OUT</b>

Source: LOC



# Napier

Napier hosted three matches for the ICC CWC 2015. The match involving the New Zealand team being a sell-out.

Matches in Napier followed on from the city's world renowned Art Deco weekend. Napier provided a number of activities for fans prior to match start, with giant cricket inflatables, art deco dancers and food stalls on the waterfront. Napier also ran a Cricket Ball Trail, starting from Emerson Street fan activation in the CBD working its way to McLean Park.

Napier had two Team Celebrations, Afghanistan and the United Arab Emirates. Both events comprised a traditional Maori welcome along with speeches from the Mayor and the team followed by refreshments and a chance for the public to interact with the team.

As part of the Tournament celebrations, Napier hosted a unique Art Deco Cricket Match at the Clifton County Cricket Club (CCCC). The CCCC ground played host to The Legends of Cricket Art Deco Match where a huge crowd came to watch a CCCC XI take on a World XI.

Date	Match
<b>Tournament matches</b>	
4 March	Pakistan v United Arab Emirates
8 March	New Zealand v Afghanistan SOLD OUT
15 March	West Indies v United Arab Emirates

Source: LOC



# Nelson

Nelson was host to three matches for the ICC CWC 2015. One match, between West Indies and Ireland, was sold out.

Nelson focussed their fan activation activity primarily around the open weekend of the Tournament and first week of the Tournament.

Nelson had a big screen Fan Activation at the top of Trafalgar Street, showing a live screening of the opening match. The big screen fan activation was part of a wider celebration across Nelson's CBD on Saturday to build community participation in the beginning of the Tournament. In addition to the big screen activation Nelson ran a CWC themed beach cricket tournament at Tahanui beach involving teams from across the region.

Nelson hosted Bangladesh for their Team Celebration. Nelson provided a cultural experience to welcome the Bangladesh Team at Whakatu Marae, Nelson. This event was in collaboration with local community groups and open to the public.

Date	Match
<b>Tournament matches</b>	
16 February	West Indies v Ireland SOLD OUT
19 February	Zimbabwe v United Arab Emirates
5 March	Bangladesh v Scotland

Source: LOC



## *Rest of New Zealand (Dunedin, Hamilton, Napier and Nelson)*

	All	Interstate and international	International only
<b>Tournament attendance</b>	106,679	37,841	16,620
<b>Match attendance</b>	68,927	33,497	15,786
<b>Average number of matches per unique visitor</b>	1.6	1.2	1.2
<b>Unique visitors to Tournament matches</b>	70,000	30,000	10,000
<b>Average bed nights</b>	1.4	2.1	3.3
<b>Total bed nights</b>	90,000	65,000	45,000
<b>Average spend per unique visitor (NZ\$, nominal)</b>	\$590	\$1,080	\$1,300
<b>Total visitor spend (NZ\$, nominal)</b>	\$35,000,000	\$30,000,000	\$15,000,000

	Impact
<b>Total direct expenditures</b>	\$55,000,000
<b>Total GRP impacts (NZ\$2015)</b>	\$25,000,000
<b>Additional jobs created (FTE)</b>	710
<b>Total household consumption (NZ\$2015)</b>	\$5,000,000

All figures are inclusive of GST. Numbers may not sum due to rounding. Unique visitors are rounded to the nearest 1,000; Total bed nights are rounded to the nearest 5,000; Average spend is rounded to the nearest \$10; Total visitor spend, GRP impacts are rounded to the nearest \$5,000,000; FTEs are rounded to the nearest 10; household consumption is rounded to the nearest \$1,000,000.

Source: PwC analysis based on PwC survey and ticketing data and financial data provided by the LOC

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