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DHL New Zealand Lions Series 2017

Economic impact and benefits analysis of the DHL New Zealand Lions Series 2017

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FINAL REPORT

Susan Sawbridge – Manager, Major Events Strategy
Ministry of Business Innovation and Employment
PO Box 1473
Wellington

12 February 2018

Post-Series evaluation of the DHL New Zealand Lions Series 2017

Dear Susan,

We are pleased to provide our report on the post-Series evaluation of the DHL New Zealand Lions Series 2017. It has been a pleasure to work with you on this assignment and we look forward to working with you again soon.

This report is provided in accordance with the terms of our consultancy agreement, dated 27 April 2017 and variation of consulting services agreement dated 27 June 2017, and is subject to the restrictions set out in Appendix A of this report.

If you have any queries please do not hesitate to contact us.

Yours sincerely,

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- British and Irish Lions
- Whangarei District Council
- Auckland Tourism Events and Economic Development
- H3 Group
- Rotorua Lakes Council
- Wellington Regional Economic Development Agency
- Christchurch City Council
- Tourism New Zealand
- New Zealanders and individuals from across the world who responded to the surveys.

What you'll find inside:

00

Executive Summary

Introduction and background

The British and Irish Lions (the Lions) is a rugby team consisting of players from England, Scotland, Ireland and Wales. Every four years, the Lions tour in the Southern Hemisphere visiting either New Zealand, South Africa or Australia.

The DHL New Zealand Lions Series 2017 (the Series) consisted of 10 matches taking place from 3 June 2017 to 8 July 2017. In total, 342,000 seats were filled to watch matches across seven venues from Whangarei to Dunedin, with over 53,000 of the seats filled by international visitors. The Lions also spent time in other parts of New Zealand.

New Zealand Rugby was both the event owner and organiser for the Series, with responsibility to plan and deliver the Series. Government investment was limited to leverage and cultural activities.

This report has been commissioned by the Ministry of Business, Innovation and Employment (MBIE) to measure the impact of the Series on New Zealand and the host city economies. The evaluation focuses on the economic and broader benefits to New Zealand and host cities from hosting the Series.

03 June	New Zealand Provincial Barbarians	*Whangarei*
07 June	Blues	*Auckland*
10 June	Crusaders	*Christchurch*
13 June	Highlanders	*Dunedin*
17 June	Maori All Blacks	*Rotorua*
20 June	Chiefs	*Hamilton*
24 June	All Blacks	*Auckland*
27 June	Hurricanes	*Wellington*
01 July	All Blacks	*Wellington*
08 July	All Blacks	*Auckland*

Key results at a glance

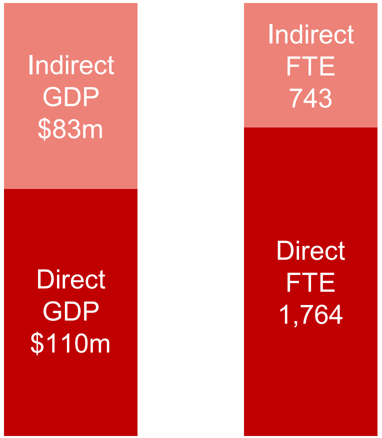
25,760
International
visitors

56,260
domestic travellers

545,000
international
guest nights

GDP
$194m*

FTE
2,507
supported



*Figures may not add due to rounding.

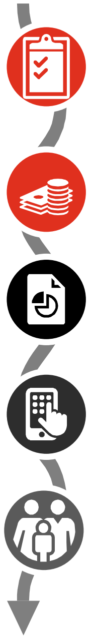
Overall approach

To analyse the economic impact of the Series, we collected expenditure data relating to hosting the Series and expenditure data relating to international and domestic tourism from match attendees. This was completed with three surveys (two series specific surveys and one additional screener question in the International Visitor Survey) and direct correspondence with New Zealand Rugby and city-hosts.

The expenditure data was modelled using multiplier analysis to estimate the direct, flow-on and total economic impacts of the Series in terms of GDP impacts to the New Zealand and host city economies. An employment impact was also estimated. This represents the employment in full-time equivalent units that supported the GDP impact. Like the GDP impact, the employment impact was also measured in terms of the direct, flow-on and total economic impact.

The broader benefits from the Series were also analysed through two quantitative surveys – one for international and one for domestic audiences. [1]

Our approach is described in the following five steps:



1. Understanding of attendance and spend

We developed and launched three online surveys to capture origins of match attendees, their typical length of stay and expenditure patterns. Two surveys were for international visitors, the other for domestic tourists.

2. Visitor spending

The sample of match attendee information from the online survey was calibrated with ticketing data. This provided us with the total spending of Series attendees at the matches including associated tourism, hospitality and related activities. This formed the basis for the total direct expenditures of the Series from tourism.

3. Hosting and leverage activities spending

The direct expenditure on hosting the Series and associated leverage activities was also obtained from New Zealand Rugby and host cities.

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

The incremental portion of the total direct expenditures were then modelled using multiplier analysis to estimate the direct, flow-on[2] and total economic impacts of Series expenditure.

5. Analysis of broader benefits

Finally, the analysis included a recognition of positive lasting benefits stemming from the Series in terms of civic pride and reputational benefits. This was captured through two online surveys of New Zealand adults and UK and Ireland adults.

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

1. A total of five surveys were completed for this project. An outline of four of the Series-specific surveys is included in Appendix B.
2. Flow-on or indirect impacts occur when businesses involved in hosting the Series or tourism and hospitality businesses purchase goods and services from other industries. Refer to page 25 for further details.

Overall approach

Key assumptions

For the national economic impact, we considered the incremental expenditure relating to the Series, spend which is additional to what would normally have been spent. We have made the following assumptions around the incremental expenditure:

- All expenditure in New Zealand relating to hosting the Series is incremental expenditure to New Zealand.
- All expenditure from the British and Irish Lions is incremental expenditure to New Zealand.
- All expenditure from international visitors who came to New Zealand to follow the British and Irish Lions as the main reason for their trip is incremental expenditure to New Zealand.
- There is no domestic tourism expenditure in the national economic impact analysis. Domestic tourism expenditure is expected to be expenditure which is displaced from consumption of other goods or services within New Zealand's boundaries.
- Hosting and leverage activity is incremental expenditure to a host city but not incremental to New Zealand.

Limitations

We have relied on a number of different data sources including surveys of ticket purchasers from New Zealand and offshore. In the analysis of the economic benefits of the Series, we have relied on the information provided to us from the survey respondents as being accurate, however there is potential that bias may exist and figures are over-inflated. To confirm reasonableness of the survey data we cross-checked the average expenditure values to other sources (eg Stats NZ's visitor expenditure data).

We have also used a number of different sources of information for our study. It would be preferable to use a single dataset to ensure consistency but due to the wide range of information needed for the study, multiple sources have been used. Therefore there could be some inconsistencies and discrepancies between the various datasets which may impact our modelling and estimates.

Margins of error and confidence intervals are not standard reporting metrics for economic impact assessments. Instead, we use sensitivity testing as a simple way to show a range for our GDP and FTE estimates and magnitude of likely impact. We also completed sensitivity testing on key assumptions to establish a range of possible outcomes. These were:

1) The number of visitors who self-reported that the Series was the reason for their trip.

2) The expenditure of visitors while they were in New Zealand.

Overall approach

Economic impact analysis involves estimation of the total economic impact of an event or industry, through analysis of the event or industry's expenditure.

This involves estimating how a change in demand for goods and services in one industry creates demand in other industries and the economy as a whole. These relationships are described by input-output tables (developed by Stats NZ), from which input-output multipliers are derived. The multipliers characterise the sector-by-sector average change in output generated, when there is extra demand in one sector.

Applying the GDP and employment multipliers, to the tourism expenditure and actual expenditure associated with hosting and leverage activities for the Series, generates an estimate of the direct and total economic impact of the Series.

This was completed on a line-by-line budget level for all expenditure relating to the Series, regardless of whether the investment was made by the government or New Zealand Rugby.

For reporting purposes, we have grouped the expenditure into the following buckets:

- International airfares include airfares that directly benefit New Zealand. This was estimated using survey data, taking the proportion of international visitors who travelled with Air New Zealand.
- Domestic travel includes car hire, local public transport and intercity ground and air transportation.
- Accommodation includes expenditure on hotels, motels and other types of accommodation.
- Food & beverages includes spend at restaurants, bars and cafes, as well as groceries and spend at the matches.
- Attractions, activities and other includes expenditure on New Zealand attractions such as museums.
- Retail shopping includes expenditure in retail stores around the country.
- Entertainment & hospitality includes costs such as beverage costs, catering costs and the hiring of bands/cultural groups.
- Venue costs are anything that relates to match or event venues. This includes construction costs, equipment hire costs and ground restoration.
- Marketing costs are concerned with the advertising of the Series, this includes fan engagement and All Blacks public events.
- Other is line items that have direct relevance to the series but can not be specified in to one of the alternative categories. This includes match officials' charges, insurance and other project-related costs.

National economic impact – Gross domestic product (GDP)

The Series directly contributed $110m to New Zealand GDP in 2017. After flow-on effects are considered, the total contribution of the Series to New Zealand GDP increases to $194m. These impacts were derived from international tourists and hosting the series.

The analysis reported here shows our standard GDP estimates (and FTE overpage). The impact on our GDP (and FTE) results from our sensitivity testing is included in section 2.2.[1]

Analysis of the sectors which make up the total contribution of the Series to New Zealand GDP shows that accommodation (35%), food and beverages (24%) and domestic travel (19%) make up close to 80% of the total GDP contribution.

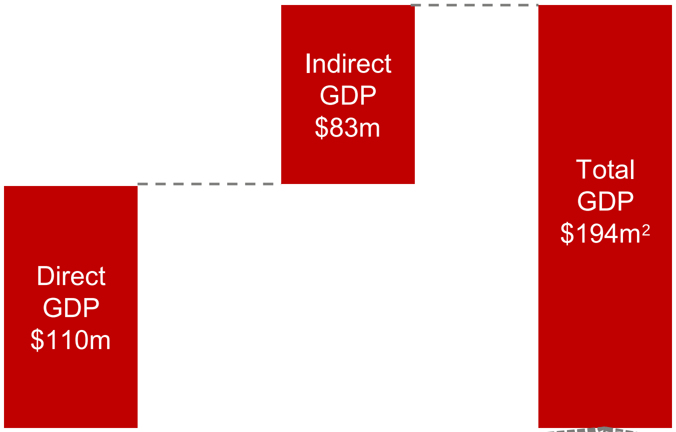


Figure 1: Total contribution to GDP by sector ($GDPm)

Category	Subtotal
International airfares	$14.1m
Domestic travel	$35.9m
Accommodation	$68.0m
Food & beverages	$46.5m
Attractions, activities and other	$8.2m
Retail shopping	$2.0m
Entertainment & hospitality	$4.1m
Venue	$8.7m
Marketing	$0.8m
Other	$5.3m
Total	**$193.6m**

1. No high sensitivity test for number of visitors. Refer to page 30 for further details.
2. Totals may not add due to rounding.

National economic impact – Full time equivalents (FTE)

The GDP impact of $110m was supported by 1,764 FTEs. These jobs will have occurred in the lead up to the tour and during the tour itself. Some could have been short-term positions created and some may be extensions of long-term jobs (eg overtime). After flow-on effects are considered, the total contribution of the Series to New Zealand employment supported was over 2,500 FTEs in 2017. These impacts were derived from international tourists and hosting the series.

Accommodation makes up 38% of the total employment contribution, while food and beverages is much more labour intensive and makes up 34% of the total employment (compared to its GDP contribution).

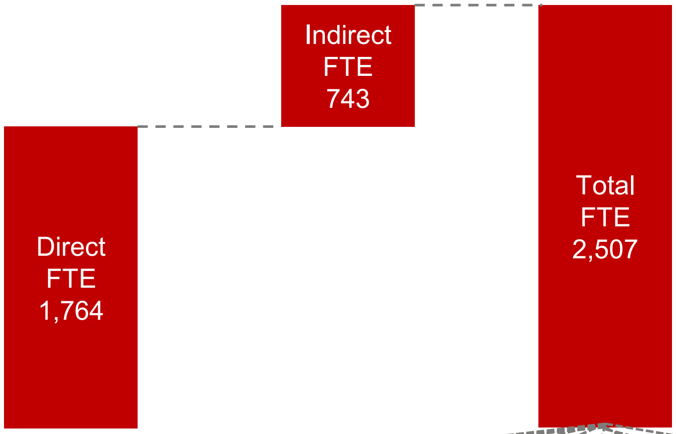


Figure 2: Total contribution to employment by sector (FTE)

Category	Subtotal
International airfares	103
Domestic travel	247
Accommodation	941
Food & beverages	843
Attractions, activities and other	113
Retail shopping	28
Entertainment & hospitality	50
Venue	110
Marketing	11
Other	62
Total	**2,507**

*Figures may not add due to rounding.

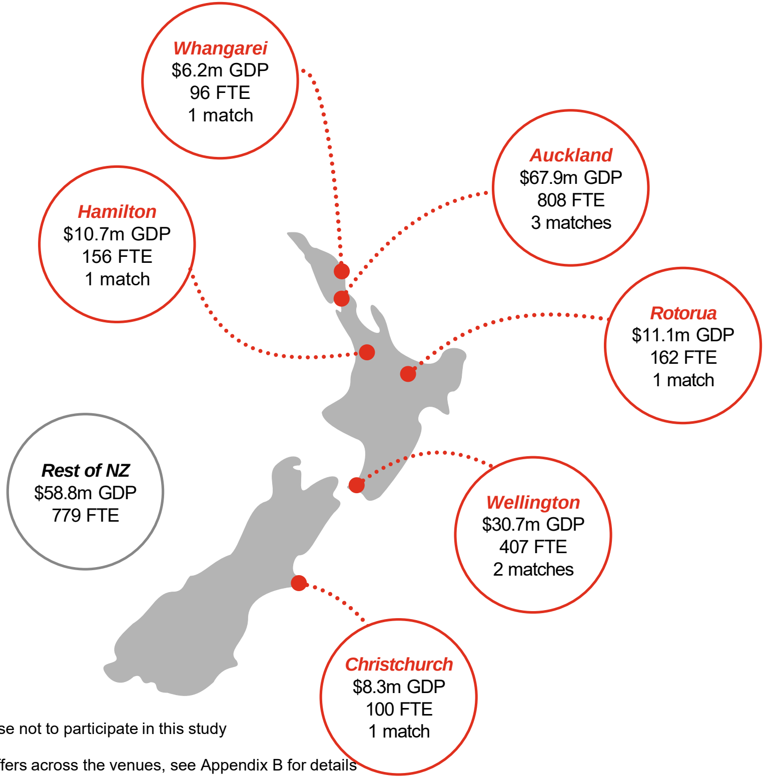
Regional economic impacts

The impact of international tourists and the costs of hosting the Series, can be disaggregated to the host cities and the rest of New Zealand. In addition, there are further contributions to regional economies from domestic tourism and host city spend on leverage activities, as this spend is additional to the host city's economy but not to New Zealand.

Auckland hosted three matches in total including two test matches, and enjoyed the largest GDP impact. Auckland also has the largest stadium. At the other end of the scale, Whangarei, which hosted the first match of the Series in the smallest stadium, had the smallest economic impact of the host cities studied.[1]

Figure 3: Total contribution to GDP and FTE employment supported by region

Figure 4: Total economic impact for host cities



1. Note Dunedin chose not to participate in this study

2. Venue capacity differs across the venues, see Appendix B for details

3. The rest of New Zealand impact relates to hosting the Series in Dunedin and international tourism expenditure outside the host cities eg Queenstown, Nelson etc. The value for the rest of NZ is a balancing figure between the national impact and sum of the host city impacts.

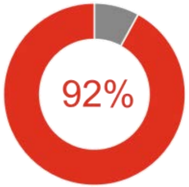
The Series has been a success for New Zealand, in the eyes of New Zealanders surveyed

Kantar TNS completed a survey of 1,000 New Zealand residents aged 18 or over to gauge their perceptions of the Series.

Note that the statistics reported are based on claimed behaviour. We cannot verify what the respondents stated.

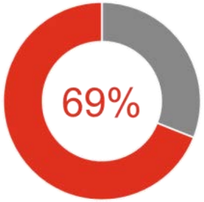
Awareness

Almost all New Zealanders surveyed (92%) were aware of the DHL New Zealand Lions Series 2017; those aged 30 or over and pre-family households have the strongest awareness (statistically significantly higher than their opposite numbers).



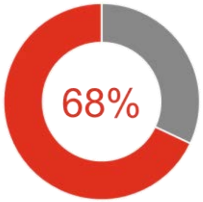
Viewership

69% of New Zealanders surveyed tuned in to a match during the Series. New Zealanders tuned in to 5 matches on TV, on average, with viewership highest for the All Blacks matches.



Perception

The Series had a positive impact on surveyed New Zealanders' perceptions of the nation – particularly in terms of being: (a) friendly and hospitable for visitors; and (b) able to host a major event. 68% agreed with the former and 64% with the latter.



Cultural programme

While the majority of New Zealanders had some awareness of the festival events that were held around the country at the time of the Series, just over a quarter of those surveyed (27%) attended at least one of the events – notwithstanding attendance, the majority agreed that the events created a sense of excitement.

The Series has been a success for New Zealand, in the eyes of the surveyed UK and Ireland audience

Kantar TNS completed a survey of 419 UK and Irish residents aged 18 or over to gauge their perceptions of the Series. Note that the statistics reported are based on claimed behaviour. We cannot verify what the respondents stated.

Awareness

Overall, 50% and 64% of UK and Ireland residents surveyed respectively were aware of the 2017 DHL New Zealand Lions Series with television, outside of broadcasting the games, generating most of the Series awareness followed by word of mouth.

Engagement

Ireland residents surveyed appear to be more engaged with the Series than UK residents – with higher awareness of the Series and tuning in to the games on TV; they are also more likely to have tuned in to more games (1.7 games on average in the UK vs. 2.6 games on average in Ireland).

Profile

The Series has successfully promoted New Zealand's profile as a major event host with 74% and 76% of surveyed UK and Ireland adults that were aware of the series, agreeing that the Series was a real credit to New Zealand and its ability to host world-class events.

Friendliness

Friendliness of New Zealanders and their sense of national pride also translated well to international audiences. 61% of UK residents and 63% of Ireland residents surveyed agreed that New Zealanders were friendly and welcoming locals.

Perception

In addition, the Series has had a positive impact on perceptions of New Zealand in general including friendly people, being a popular holiday destination and having spectacular landscape and scenery. 54% of UK residents and 59% of Ireland residents surveyed agreed that New Zealand is a popular destination.

Cultural programme

As a result, the majority of UK and Ireland residents are more likely to consider New Zealand as a destination for a holiday and there are good levels of stated interest to live and work in New Zealand. 20% of UK residents, and 19% of Ireland residents surveyed, are more likely to consider New Zealand as a place to work while 23% and 20% respectively are more likely to consider New Zealand as a place to live.

01

Background and overview

Introduction

Introduction

The British and Irish Lions (the Lions) is a rugby team consisting of players from England, Scotland, Ireland and Wales. The Lions first toured New Zealand in 1888 and since then have built a long and storied history. Every four years, the Lions tour in the Southern Hemisphere visiting either New Zealand, South Africa or Australia. The Lions last visited New Zealand in 2005, playing 11 matches.

The 2017 DHL New Zealand Lions Series (the Series) consisted of 10 matches taking place from 3 June 2017 to 8 July 2017. In total, 342,000 seats were filled to watch matches across seven venues from Whangarei to Dunedin. The Lions also visited a number of other locations throughout their tour of New Zealand, which also contributed to the national economy.

Purpose of report

This report has been commissioned by the Ministry of Business, Innovation and Employment (MBIE) to measure the impact of the Series on New Zealand and the host city economies*. The evaluation focuses on the economic and cultural benefits to New Zealand from hosting the Series.

This report considers the direct and indirect (or flow-on) economic impacts and benefits of the event on:

- the New Zealand national economy
- New Zealand city economies (Auckland, Christchurch, Wellington, Hamilton, Whangarei and Rotorua).

It also considers the broader benefits of the Series through:

- the social and cultural benefits received by New Zealanders
- the reputational benefits received by New Zealand in key business and tourism markets: the UK and Ireland.

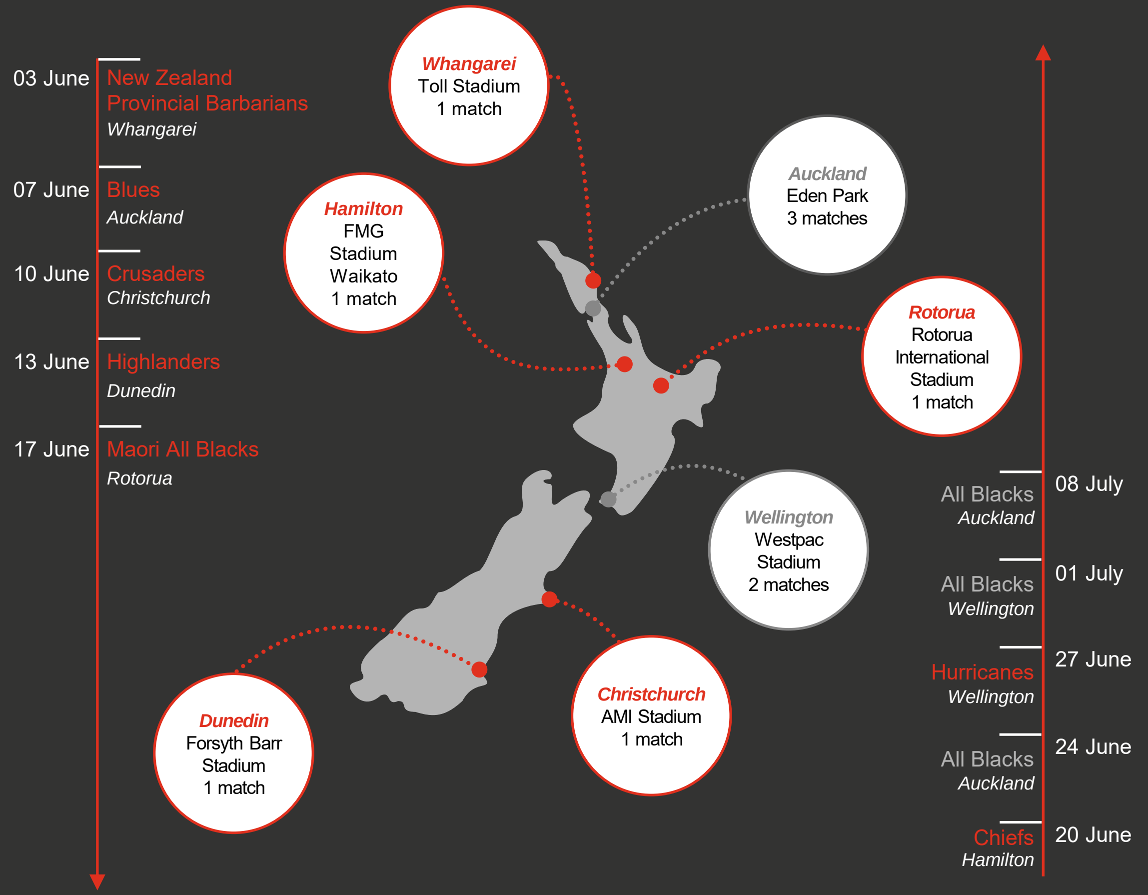
A wider suite of broader benefits arising from the Series have not been analysed in this report, but include branding and promotion benefits for New Zealand. New Zealand's ability to host major events such as the Series, was showcased to the world, continuing the success of hosting the Rugby World Cup 2011, FIFA U20, Cricket World Cup 2015 and the World Masters Games.

*All host cities have been evaluated as part of this report, except Dunedin as Dunedin decided not to take part

Matches in the Series were spread around New Zealand with 8 matches played in the North Island and 2 in the South Island

The three All Blacks tests, the most high profile matches of the Series, were played in two cities:

- Auckland hosted the first and third tests
- Wellington hosted the second test.



Overview of the cultural leverage programme

The Government invested in a New Zealand-wide cultural programme to run alongside the Series in order to:

- showcase New Zealand culture, arts, innovation, landscapes, heritage, hospitality and way of life to international visitors and the international audience through broadcast and visiting media
- create a nationwide focus and sense of celebration that enhances New Zealand's international reputation as a world-class major event host
- diversify visitor spending across sectors and regions
- encourage and support New Zealand Inc. agencies, industries, businesses and regions to leverage the opportunities presented by the event
- give visitors and New Zealanders an unforgettable Kiwi experience.

The intent was for government to support host cities in building a programme of activity and activation to:

- enhance the Series
- amplify game day experiences
- extract maximum visitor and local engagement with New Zealand values, experiences, products and culture
- deliver legacy outcomes for New Zealand's communities.

The programme included:

- A nationwide Matariki themed festival
- Game-day activation including adding a New Zealand lens
- A schools programme, rugby club programmes and fan activities
- Queens Wharf Fan Zone in Auckland and Fan Zone in Wellington

02

Results

2.1

Attendance and visitation

Snapshot of international visitors

During June and July 2017, more than 477,000 international visitors travelled to New Zealand.[1] Of that number, approximately 25,760 or 5.4% of all international visitors specified the Series was the main purpose for their trip to New Zealand.[2,3]

This is over 25% more than the number of international visitors who came to New Zealand for the 2005 Series.[4]

On average, each international visitor for the Series:

Attended 3.7 matches

Stayed 22 days

Length of stay	**% of total**
Less than 1 week	11%
1-2 weeks	23%
2-3 weeks	33%
More than 3 weeks	33%
Minimum	**2**
Maximum	**365**
Median	**18**
Mean	**22**
Survey data - Number of days	

To provide some additional insight into international travellers, surveying suggests that international visitors for the Series most commonly:

- travelled with their husband, wife or partner (42%) or friends (26%)
- visited for a holiday/vacation (71%)
- arrived by plane at Auckland airport (86%) in economy class (75%)
- travelled as independent travellers (76%), rather than as a part of an organised group (24%).

Snapshot of domestic tourists

There were over 56,000 domestic tourists for the Series.[5] These are New Zealanders who travelled to a different city from the city or town they live in, to attend a Series match.

On average, each domestic tourist:

- attended 1.9 matches[5]
- spent 1 night in each city visited
- visited with their spouse/partner (31%), relatives (26%) or friends (32%).

1. Based on claimed behaviour from travellers at point of departure. The IVS asks travellers about the date they arrived in New Zealand, which is then used to generate statistics on international visitor arrivals by arrival month. http://archive.stats.govt.nz/browse_for_stats/population/Migration/iva.aspx
2. Refer to page 23 for tickets issued per game.
3. Kantar TNS surveyed departing travellers as part of the IVS between June and August 2017. Of those surveyed, 5.4% of total international visitors to New Zealand stated that the Series was the main purpose of their trip to New Zealand. Note this is based on self-reported, or claimed, behaviour of 947 respondents to the IVS. The percentage of travellers who came to New Zealand for the series (information collected at point of departure for travellers between June and August 2017) is applied to the number of international visitors who came to New Zealand in June and July 2017 (based on self-reported arrival dates).
4. Covec (2005) reported 20,400 international visitors came to New Zealand for the 2005 Lions Series.
5. PwC estimate based on TNS survey, New Zealand Rugby and All Blacks Hospitality data.
6. Average for domestic tourists only, not overall New Zealanders. That is the average of New Zealanders who attended a match outside their home city.

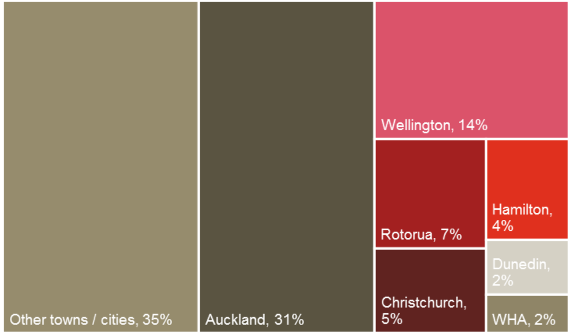
2.1

Attendance and visitation

International guest nights

In our survey of international visitors, approximately 31% of total international guest nights were spent in Auckland, while over one-third were spent in other towns and cities across New Zealand which did not host a match.

Figure 5: International guest nights by location



*WHA = Whangarei

35% of international guest nights were spent outside of the host cities

545,000 international guest nights

Extrapolation of our survey data to the total number of international visitors who travelled because of the Series indicates that total additional guest nights were 545,000 immediately prior, during and after the Series.

Figure 6: Total international guest nights by location

Place	Total guest nights
Whangarei	9,220
Auckland	168,430
Hamilton	24,390
Rotorua	35,460
Wellington	78,030
Christchurch	27,260
Dunedin	13,190
Other towns / cities	189,000
	544,980

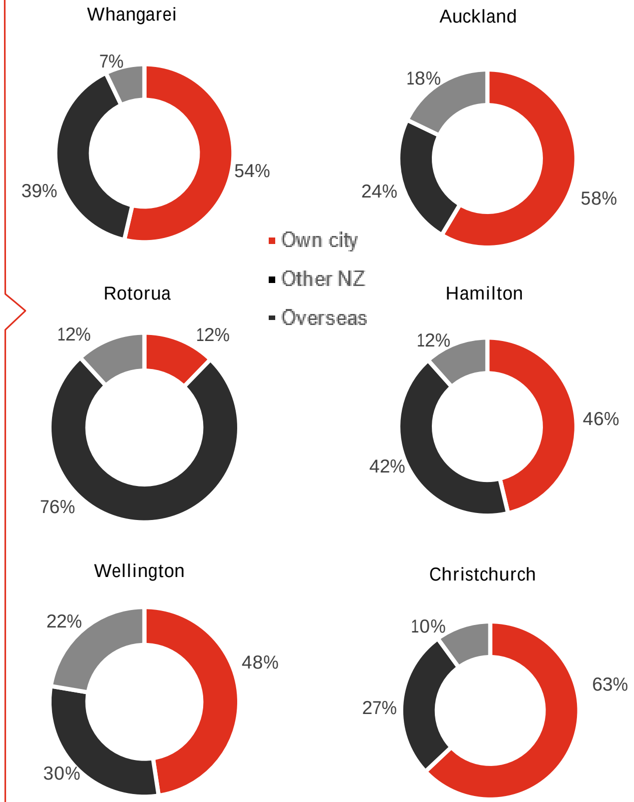
*Totals may not add due to rounding.
**Results for the three Auckland matches and two Wellington matches have been aggregated

2.1

Attendance and visitation

Ticketing breakdown for host cities

The charts below display the breakdown of tickets sold to host city residents (own city), domestic tourists (other New Zealand), and international visitors (overseas). The breakdown is based on ticketing data from New Zealand Rugby.



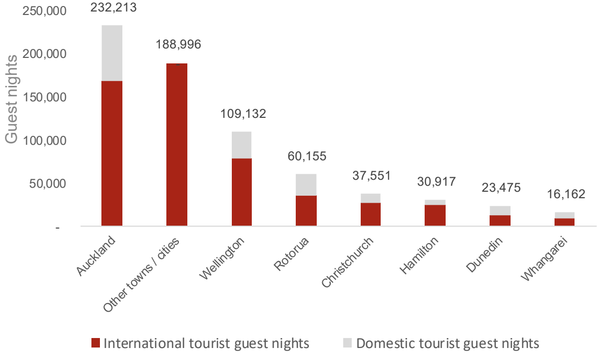
*Ticketing breakdown for host cities**

Venue	Capacity	Own city	Other NZ	International	Unknown origin and tickets not issued
Whangarei	19,720	9,098	6,660	1,208	2,754
Auckland	143,282	83,451	33,607	25,446	778
Christchurch	20,635	12,285	5,269	1,956	1,125
Dunedin	28,296	15,009	7,224	1,975	4,088
Rotorua	28,193	3,260	20,203	3,141	1,590
Hamilton	29,984	13,401	12,207	3,356	1,020
Wellington	79,345	34,128	21,572	16,013	7,632

Total guest nights for host cities

In addition to guest nights from international tourists, there are tourism impacts for each host city from domestic tourists ie New Zealanders who travel from their home city to another city to attend a match.

The charts below display the total guest nights (international and domestic) for each host city.



Tickets sold to residents from the host city are assumed to generate no additional guest nights for the host city. The number of guest nights for domestic and international tourists are taken from surveys of international and domestic ticket purchasers (refer to Appendix B for further details).

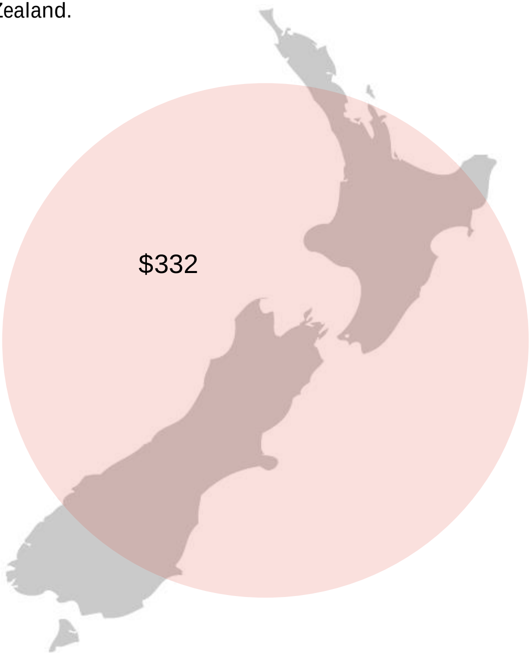
*Source: New Zealand Rugby, All Blacks Hospitality, PwC analysis

2.1

Attendance and visitation

Expenditure by international tourists

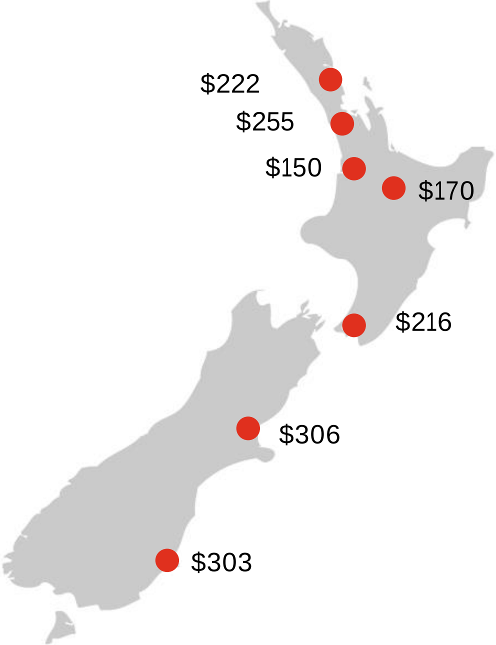
We estimated average expenditure by international tourists on a per person per night basis, using data collected from our survey. On average, each international tourist spent $332 per person per night during their stay in New Zealand.



A breakdown of the expenditure into different categories is included in Appendix C.

Expenditure by domestic tourists

We estimated average expenditure by domestic tourists on a per person per night basis, using data collected from our survey. On average, each domestic tourist spent the following on their trip to host cities per night:



Per person per night spend was highest in the two South Island matches. Analysis of the domestic tourism expenditure data shows that the two biggest drivers of spend were restaurants and bars, and overall transport costs (refer to Appendix C).

2.2

National economic impact

We have estimated two measures of the Series' contribution to New Zealand's economy:

- Value added – the Series' contribution to New Zealand's GDP, which is calculated as the total returns to labour and capital in the industry.
- Employment – the number of FTEs which supported the GDP impact. Some of these jobs will have occurred in the lead up to the tour and during the tour itself. Some could have been short-term positions created and some may be extensions of long-term jobs (eg overtime).

In our approach, these are estimated as derivatives of final expenditure by tourists and on hosting the Series and are the direct economic impacts of the Series.

In addition to its direct economic impacts, there are flow-on or indirect effects elsewhere in the economy.

In order to do business, firms must purchase inputs from other industries. Flow-on or indirect impacts occur when businesses involved in hosting the Series or tourism and hospitality businesses purchase goods and services from other industries. For example, a restaurant must buy fresh produce, may need to hire additional chillers and pay for additional electricity, etc. The impact of supporting businesses is included as indirect impacts.

The total economic impact of the industry is equal to the sum of its direct and indirect impacts.

In order to estimate the direct, indirect and total economic impacts of the Series, we have used multiplier analysis, using multiplier tables from Butcher Partners.

2.2

National economic impact

Approach

Multiplier analysis starts with total incremental expenditure on the Series, which we have collected from a number of sources.

The total direct expenditures considered in this study include all spending activities attributable to the Series.

For the national economic impact, we considered two expenditure streams and collected data on each separately:

1. Hosting the Series

- We obtained expenditure data from New Zealand Rugby and leverage activity organisers.

2. Tourism expenditure from international visitors

- We obtained expenditure data from the surveyed international visitors (see section 2.1 Attendance and visitation).
- We extrapolated the survey data using Stats NZ's International Visitor Survey and Series ticketing data to total international tourists who came to New Zealand because of the Series.
- We obtained expenditure data from the British and Irish Lions team.

Assumptions[1]

For the national economic impact, we considered the incremental expenditure relating to the Series, spend which is additional to what would normally have been spent. We have made the following assumptions around the incremental expenditure:

- All expenditure relating to hosting the Series at a national level is incremental expenditure to New Zealand. The Lions only tour the Southern Hemisphere every four years and last toured New Zealand in 2005, in this regard the 2017 spend is additional to New Zealand. Furthermore, the Series has a stronger legacy to a routine international tour and has a larger profile in relation to hosting the Lions.
- All expenditure from the British and Irish Lions is incremental expenditure to New Zealand.
- There is no domestic tourism expenditure in the national economic impact analysis. Domestic tourism expenditure is expected to be expenditure which is displaced from consumption of other goods or services within New Zealand's boundaries.
- We estimate the economic impact of the visitors who claimed the Series was the main reason for their trip to New Zealand. Visitors who stated the Series was only a partial reason for their trip have only been included in the sensitivity testing. This means that our central estimate of the economic impact of the Series is conservative.

1. Further assumptions are outlined in Appendix B.

2.2

National economic impact

Economic impact analysis involves estimation of the total economic impact of an event or industry, through analysis of the event or industry's expenditure.

This involves estimating how a change in demand for goods and services in one industry, creates demand in other industries and the economy as a whole. These relationships are characterised by input-output tables, from which input-output multipliers are derived. The multipliers characterise the sector-by-sector average change in output required, when there is extra demand. Applying the GDP and employment multipliers to the actual expenditure associated with hosting and leverage activities for the Series and tourism expenditure, generates an estimate of the direct and total economic impact of the Series.

This was completed on a line-by-line budget level for all expenditure relating to the Series, regardless of whether the investment was made by the government or New Zealand Rugby.

For reporting purposes, we have grouped the expenditure into the following buckets:

- International airfares include airfares that directly benefit New Zealand. This was estimated using survey data, taking the proportion of international visitors who travelled with Air New Zealand.
- Domestic travel includes car hire, local public transport and intercity ground and air transportation.
- Accommodation includes expenditure on hotels, motels and other types of accommodation.
- Food & beverages includes spend at restaurants, bars and cafes, as well as groceries and spend at the matches.
- Attractions, activities and other includes expenditure on New Zealand attractions such as museums.
- Retail shopping includes expenditure in retail stores around the country.
- Entertainment & hospitality includes costs such as beverage costs, catering costs and the hiring of bands/cultural groups.
- Venue costs are anything that relates to match or event venues. This includes construction costs, equipment hire costs and ground restoration.
- Marketing costs are concerned with the advertising of the Series, this includes fan engagement and All Blacks public events.
- Other is line items that have direct relevance to the series but can not be specified in to one of the alternative categories. This includes match officials' charges, insurance and other project-related costs.

2.2

National economic impact

The Series directly contributed $110m to New Zealand GDP in 2017. Employment of 1,764 FTEs supported the GDP impact. Some of these jobs will have occurred in the lead up to the tour and during the tour itself. Some could have been short-term positions created and some may be extensions of long-term jobs (eg overtime). After flow-on effects are considered, the total contribution of the Series to New Zealand GDP increases to $194m and total employment supported increases to over 2,507 FTEs in 2017.

25,760 visitors

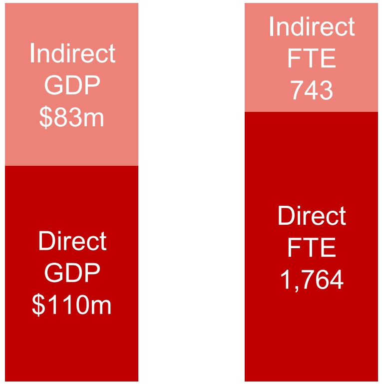
56,260 domestic travellers

545,000 international guest nights

68% of international visitors surveyed were extremely likely to recommend New Zealand to others

GDP $194m[1]

FTE 2,507



1. Totals may not add due to rounding.

2.2

National economic impact

Analysis of the sectors which make up the total contribution of the Series to New Zealand GDP shows that the impact on accommodation (35%), food and beverages (24%) and domestic travel (19%) made up nearly 80% of the total GDP contribution. Accommodation makes up 38% of the total employment contribution, while food and beverages, relative to its GDP contribution, is much more labour intensive and makes up 34% of the total employment.

Figure 7: Total contribution to GDP by sector

Category	Subtotal
International airfares	$14.1m
Domestic travel	$35.9m
Accommodation	$68.0m
Food & beverages	$46.5m
Attractions, activities and other	$8.2m
Retail shopping	$2.0m
Entertainment & hospitality	$4.1m
Venue	$8.7m
Marketing	$0.8m
Other	$5.3m
Total	**$193.6m**

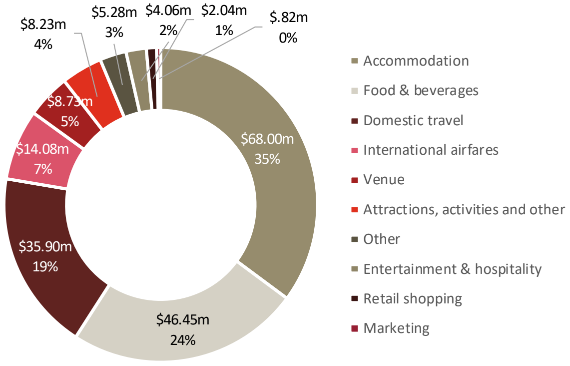
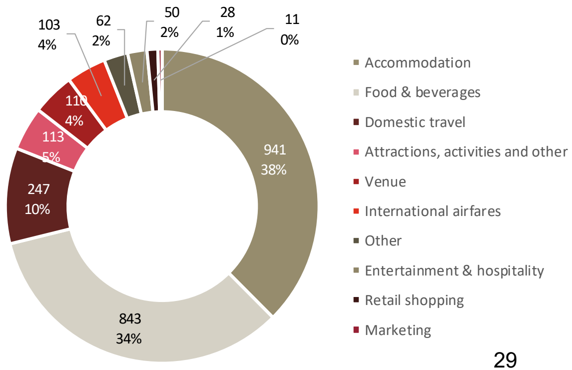


Figure 8: Total contribution to employment by sector

Category	Subtotal
International airfares	103
Domestic travel	247
Accommodation	941
Food & beverages	843
Attractions, activities and other	113
Retail shopping	28
Entertainment & hospitality	50
Venue	110
Marketing	11
Other	62
Total	**2,507**



2.2

National economic impact

Sensitivity testing

Sensitivity testing is used to test the influence of the assumptions and key variables on the overall results. By changing these key variables we are able to establish a range of possible outcomes around our standard GDP and employment impacts. We completed two separate sensitivity tests.

The first sensitivity test investigated how the GDP and FTE impact changes if the expenditure on groceries, food and beverages, and accommodation changes.

The second sensitivity test investigated how the GDP and FTE impact changes if the number of international visitors travelling to New Zealand changes.

The results of these two tests are included on this page and the following page.

Sensitivity test 1: Expenditure values

We note that due to our survey approach, there is some uncertainty in the average expenditure by category values that we have estimated. The largest contributors to the economic impact were food and beverages and accommodation, therefore we applied a variation on the expenditure of international tourists to see the effect on GDP and FTEs.

Figure 9: Sensitivity test 1

	Low	High
Groceries, food and beverages, accommodation	-10%	+10%

The results of the sensitivity testing on key expenditure categories (see Figure 10) show that the total contribution of the Series to New Zealand's GDP is likely to range between $183.1m and $204.1m. The jobs required to support the GDP impact is between 2,344 and 2,670 FTEs.

Figure 10: Sensitivity testing on expenditure

	Low	Standard Total	High
GDP	$183.1m	$193.6m	$204.1m
FTE	2,344	2,507	2,670

2.2

National economic impact

Sensitivity test 2: International tourists

Our analysis is reliant on self-reported behaviour as we use the number of international tourists to extrapolate survey results and estimate GDP and FTE impacts.

477,000 international visitors came to New Zealand in June and July 2017. 5.4% of those international visitors cited the Series as the main reason for their trip (25,760 visitors), and a further 1.6% cited the Series as part of the reason for their trip (7,632 visitors). As there is some uncertainty in this, we conducted a sensitivity test that considered the effect on GDP to include all the people visiting for the Series ie travellers to New Zealand who stated the Series was either the main purpose for their trip or part of the purpose for their trip.

Note we do not consider a low scenario on this self-reported behaviour as it is unlikely that the true number of visitors is over-reported.

Figure 11: Sensitivity test 2

	Standard	High
% of international visitors	5.4%	7.0%
Number of international tourists	25,760 visitors	33,392 visitors

The results of the sensitivity testing on the number of international tourists (see Figure 12) shows that the total contribution of the Series to New Zealand's GDP is likely to be between $194 and $245m. The jobs required to support the GDP impact could be as high as 3,173 FTEs.

Figure 12: Sensitivity testing on number of international tourists

	Standard	High
GDP	$193.6m	$244.7m
FTE	2,507	3,173

2.3

Regional economic impact

Approach

We followed a similar approach to the national analysis for each of the economic impact assessments of the host cities.

We considered three expenditure streams and collected data on each separately:

1. hosting and leverage for the Series
2. tourism expenditure from international visitors
3. domestic tourism expenditure.

Hosting and leverage for the Series

- We obtained expenditure data directly from the event hosts.
- We pro-rated the data provided at the national level using the total match tickets sold per city as the allocation method.
- We obtained expenditure data from each host city that participated in this study. Each host city was able to provide details on spend within its city – which was included in that city's analysis.

"Hosting and leverage" includes expenditure that is a direct result of hosting or enhancing the Series. For example, marketing, venue hire and city dressing for the Series itself as well as event spaces such as the Fan Zones.

Hosting & Leverage includes the following categories: entertainment and hospitality, venue, marketing and other (refer to page 27 for definitions).

Tourism expenditure from international visitors

- The total tourism expenditure in New Zealand from international visitors was used as the basis.
- The proportion of expenditure relating to guest nights spent outside the host cities was removed (ie the proportion of international visitors' expenditure in Queenstown is removed).
- The remaining expenditure is pro-rated to each host city using total tickets sold for each city as an allocator.

Tourism expenditure from domestic visitors

- We obtained expenditure data from domestic tourists for matches attended outside their own home city.
- We extrapolated this data based on ticketing data on the location of ticket purchasers.

Summary slides are provided in the following pages. More detailed results are available in Appendix C.

Regional impact for Whangarei

Whangarei hosted the first match of the Series. Approximately 1,208 international visitors and 6,660 domestic tourists attended the match in Whangarei, which was equivalent to 16,162 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $5.7m to the Whangarei economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Whangarei's GDP was $6.2m (including flow-on effects). 96 FTEs were required to support the GDP impact.

Sensitivity testing on expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the total contribution to Whangarei's GDP of $5.9m to $6.4m, and between 90 and 101 FTEs supported.

Figure 13: Overall economic impact for Whangarei ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$4.3m	$1.4m	$5.7m
Hosting & Leverage	$0.4m	$0.1m	$0.5m
Total	**$4.7m**	**$1.5m**	**$6.2m**

Figure 14: Overall economic impact for Whangarei (FTE)

FTE	Direct	Indirect	Total
Tourism	73	16	89
Hosting & Leverage	5	1	7
Total	**78**	**17**	**96**

Figure 15: Sensitivity analysis for Whangarei

	Low	Standard Total	High
GDP	$5.9m	$6.2m	$6.4m
FTE	90	96	101

Match 1 - Lions v Provincial Barbarians
Saturday 3 June
Venue capacity: 19,720

16,162
Guest nights

1,208
international visitors

6,660
domestic visitors

Regional impact for Auckland

Auckland hosted three matches in the Series, including two test matches. Approximately 25,446 international visitors and 33,607 domestic tourists attended the matches in Auckland, which was equivalent to 232,213 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $59.4m to the Auckland economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Auckland's GDP was $67.9m (including flow-on effects). 808 FTEs were required to support the GDP impact.

Sensitivity testing on expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the total contribution to Auckland's GDP of $65.1m to $70.7m, and between 764 and 851 FTEs supported.

Figure 16: Overall economic impact for Auckland ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$36.6m	$22.9m	$59.4m
Hosting & Leverage	$5.1m	$3.3m	$8.4m
Total	**$41.7m**	**$26.2m**	**$67.9m**

Figure 17: Overall economic impact for Auckland (FTE)

FTE	Direct	Indirect	Total
Tourism	497	206	703
Hosting & Leverage	71	33	104
Total	**568**	**240**	**808**

Figure 18: Sensitivity analysis for Auckland

	Low	Standard Total	High
GDP	$65.1m	$67.9m	$70.7m
FTE	764	808	851

Match 2 - Lions v Blues - Wednesday 7 June
Match 7 - Lions v All Blacks - Saturday 24 June
Match 10 - Lions v All Blacks - Saturday 8 July
Venue capacity: 48,709*

232,213
Guest nights

25,446
international visitors

33,607
domestic visitors

*Refers to the capacity for the third test. Capacity can differ between matches as the seating configuration can be altered.

Regional impact for Christchurch

Christchurch hosted one match during the Series. Approximately 1,956 international visitors and 5,269 domestic tourists attended the match in Wellington, equivalent to 37,551 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $7.3m to the Christchurch economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Christchurch's GDP was $8.3m (including flow-on effects). 100FTEs were required to support the GDP impact.

Sensitivity testing on the expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the tourism contribution to Christchurch's GDP of $7.9m to $8.6m, and between 95 and 105 FTEs supported.

Figure 19: Overall economic impact for Christchurch ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$4.7m	$2.7m	$7.3m
Hosting & Leverage	$0.6m	$0.3m	$0.9m
Total	**$5.3m**	**$3.0m**	**$8.3m**

Figure 20: Overall economic impact for Christchurch (FTE)

FTE	Direct	Indirect	Total
Tourism	62	26	88
Hosting & Leverage	8	4	12
Total	**70**	**30**	**100**

Figure 21: Sensitivity analysis for Christchurch

	Low	Standard Total	High
GDP	$7.9m	$8.3m	$8.6m
FTE	95	100	105

Match 3 - Lions v Crusaders
Saturday 10 June
Venue capacity: 20,635

37,551
Guest nights

1,956
international visitors

5,269
domestic visitors

Regional impact for Rotorua

Rotorua hosted one match during the Series. Approximately 3,141 international visitors and 20,203 domestic tourists attended the match in Rotorua, equivalent to 60,155 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $10.3m to the Rotorua economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Rotorua's GDP was $11.1m (including flow-on effects). 162 FTEs were required to support the GDP impact.

Sensitivity testing on the expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the tourism contribution to Rotorua's GDP of $10.6m to $11.7m, and between 152 and 172 FTEs supported.

Figure 22: Overall economic impact for Rotorua ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$7.5m	$2.8m	$10.3m
Hosting & Leverage	$0.6m	$0.2m	$0.8m
Total	**$8.1m**	**$3.0m**	**$11.1m**

Figure 23: Overall economic impact for Rotorua (FTE)

FTE	Direct	Indirect	Total
Tourism	123	30	152
Hosting & Leverage	7	2	9
Total	**130**	**32**	**162**

Figure 24: Sensitivity analysis for Rotorua

	Low	Standard Total	High
GDP	$10.6m	$11.1m	$11.7m
FTE	152	162	172

Match 5 - Lions v Maori All Blacks
Saturday 17 June
Venue capacity: 28,193

60,155
guest nights

3,141
international visitors

20,203
domestic visitors

Regional impact for Hamilton

Hamilton hosted one match during the Series. Approximately 3,356 international visitors and 12,207 domestic tourists attended the match in Hamilton, equivalent to 30,917 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $10.0m to the Hamilton economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Hamilton's GDP was $10.7m (including flow-on effects). 156 FTEs were required to support the GDP impact.

Sensitivity testing on expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the tourism contribution to Hamilton's GDP of $10.2m to $11.2m, and between 147 and 166 FTEs supported.

Figure 25: Overall economic impact for Hamilton ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$7.0m	$3.0m	$10.0m
Hosting & Leverage	$0.5m	$0.2m	$0.7m
Total	**$7.5m**	**$3.3m**	**$10.7m**

Figure 26: Overall economic impact for Hamilton (FTE)

FTE	Direct	Indirect	Total
Tourism	114	33	147
Hosting & Leverage	7	3	9
Total	**120**	**36**	**156**

Figure 27: Sensitivity analysis for Hamilton

	Low	Standard Total	High
GDP	$10.2m	$10.7m	$11.2m
FTE	147	156	166

Match 6 - Lions v Chiefs
Tuesday 20 June
Venue capacity: 29,984

30,917
Guest nights

3,356
international visitors

12,207
domestic visitors

Regional impact for Wellington

Wellington hosted two matches during the Series. Approximately 16,013 international visitors and 21,572 domestic tourists attended the matches in Wellington, equivalent to 109,132 additional guest nights.

Together with the spend from the British and Irish Lions team, the impact from tourism contributed $27.2m to the Wellington economy (including flow-on effects).

Including expenditure relating to hosting and leverage activities, the overall economic contribution of the Series to Wellington's GDP was $30.7m (including flow-on effects). 407 FTEs were required to support the GDP impact.

Sensitivity testing on the expenditure on accommodation, food and beverages and groceries (+/- 10%) suggests a range for the tourism contribution to Wellington's GDP of $29.4m to $32.0m, and between 381 and 432 FTEs supported.

Figure 28: Overall economic impact for Wellington ($GDPm)

GDP	Direct	Indirect	Total
Tourism	$19.6m	$7.7m	$27.2m
Hosting & Leverage	$2.4m	$1.1m	$3.5m
Total	**$21.9m**	**$8.7m**	**$30.7m**

Figure 29: Overall economic impact for Wellington (FTE)

FTE	Direct	Indirect	Total
Tourism	305	63	368
Hosting & Leverage	29	10	39
Total	**334**	**73**	**407**

Figure 30: Sensitivity analysis for Wellington

	Low	Standard Total	High
GDP	$29.4m	$30.7m	$32.0m
FTE	381	407	432

Match 8 - Lions v Hurricanes - Saturday 27 June
Match 9 - Lions v All Blacks - Saturday 1 July
Venue capacity: 39,916

109,132
Guest nights

16,013
international visitors

21,572
domestic visitors

03

Broader benefits

3.1

Domestic reputation

In July 2017, Kantar TNS surveyed New Zealand residents to gauge their awareness and perceptions of the recent Series and related festival events

Background

- This section considers the reputational impact of the Series among the domestic audience, addressing key questions including:
  - awareness of the Series and festival events
  - attendance of Series matches and broadcast viewership
  - attendance of the related festival events
  - perceptions of New Zealand, among those aware of the Series, on a range of attributes of interest to MBIE.

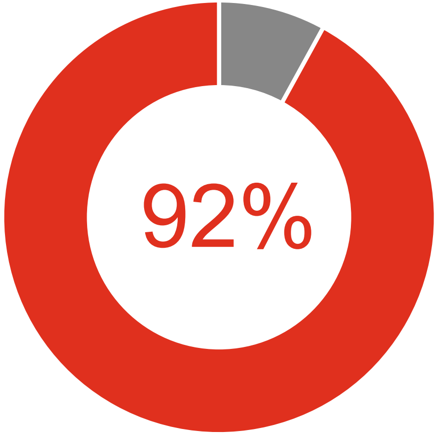
Research approach

- Kantar TNS designed and conducted a 10 minute online survey of New Zealand residents aged 18 plus to answer these questions.
- The survey ran in market from 17 to 23 July 2017 (the Series itself ended on 8 July 2017).
- 1000 people completed the survey; these people were randomly surveyed from ConsumerLink's online panel.
- The data has been weighted by age, gender and region according to Stats NZ population estimates, to ensure the sample is representative of the target population.
- Any tests of statistical significance have been conducted at the 90% confidence level.
- It should be noted that all responses are based on *claimed* behaviour / attendance.

Summary slides are provided in the following pages. More detailed results are available in Appendix C.

At over 90% of New Zealand adults, awareness of the Series was strong, particularly among those surveyed aged 30 or over and pre-family households

Prompted awareness of the DHL New Zealand Lions Series 2017



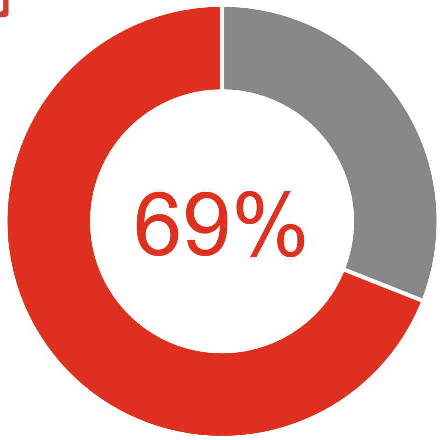
Statistically significant differences

- Significantly higher among:
  - 70+ years (97%)
  - North Island residents (93%)
  - Households without children (94%).
- Significantly lower among:
  - 18-29 years (87%)
  - South Island residents (89%)
  - Households with children of school age or less (90%)
  - Other* ethnicity (87%).

Base: New Zealanders aged 18 plus | Sample size: n=1000 | *Other means neither New Zealand European nor Māori / Pasifika

Over two thirds of New Zealanders surveyed claimed to have tuned in to at least one of the matches on TV (live or otherwise) and the All Blacks matches were most widely viewed

TV viewership of any match part of the DHL New Zealand Lions Series 2017



Significantly higher among:

- Males (74%)
- North Island residents (70%)
- Households without children (71%)
- HHI of $120K+ (78%).

Significantly lower among

- Females (64%)
- South Island residents (63%)
- Households with children of school age or less (66%)
- HHI[1] up to $40K (60%).

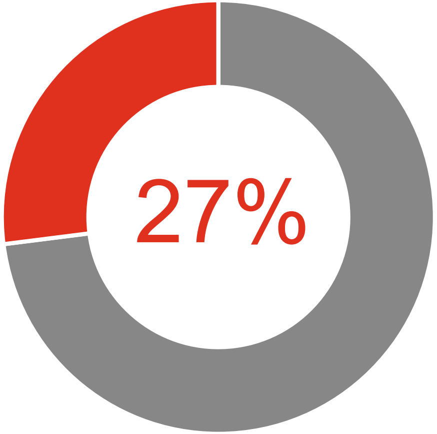
Individual matches viewed on TV[2]

Match	Base: People that viewed at least one match	Base: New Zealanders aged 18 plus
Whangarei – Provincial Barbarians	35%	24%
Auckland – Blues	35%	24%
Christchurch – Crusaders	38%	26%
Dunedin – Highlanders	36%	25%
Rotorua – Maori All Blacks	39%	27%
Hamilton – Chiefs	32%	22%
Auckland – All Blacks	76%	52%
Wellington – Hurricanes	36%	24%
Wellington – All Blacks	77%	53%
Auckland – All Blacks	84%	57%
Sample size for base:	*688*	*1000*

Base: New Zealanders aged 18 plus | Sample size: n=1000 | (1) HHI = household income | (2) Significant differences by demographic segment available in the complementary data tables

A number of events were held around the country at the time of the Series, with 27% of New Zealand adults surveyed attending at least one event, and 12% specifically attending an event in Auckland

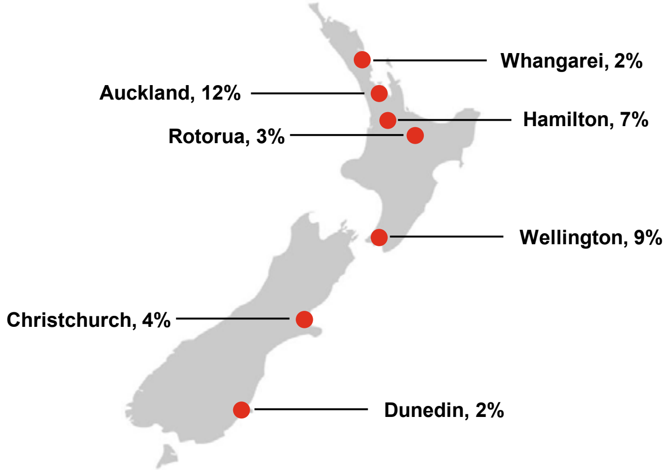
Attendance of at least one festival event held during the course of the Series, anywhere in New Zealand(1)



Significantly higher among:
- 18-29 years (35%)
- North Island residents (29%)
- HHI(3) of $80-120K (32%)
- Other ethnicity (47%).

Significantly lower among
- 70+ years (15%)
- HHI(2) up to $40K (20%)
- New Zealand European (23%).

Attendance of at least one festival event in each of the following cities(3)

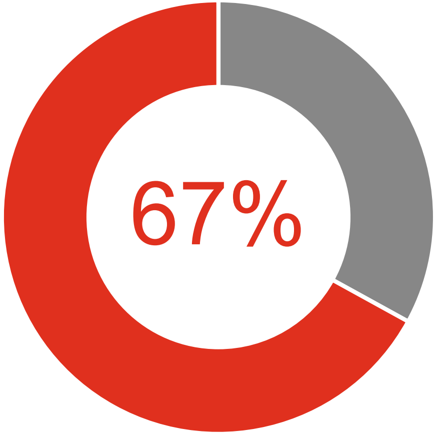


Base: New Zealanders aged 18 plus | Sample size: n=1000 | (1) I.e. Any event held in Whangarei, Auckland, Hamilton, Rotorua, Wellington, Christchurch, Dunedin | (2) HHI = household income | (3) Significant differences by demographic segment available in the complementary data tables

Note – individuals may have attended events in more than one city, hence the numbers above add up to more than the figure of 27% on the left

Of the 27% of people who attended an event, 67% planned to attend the event in advance and most of these people surveyed heard about the event from family and friends

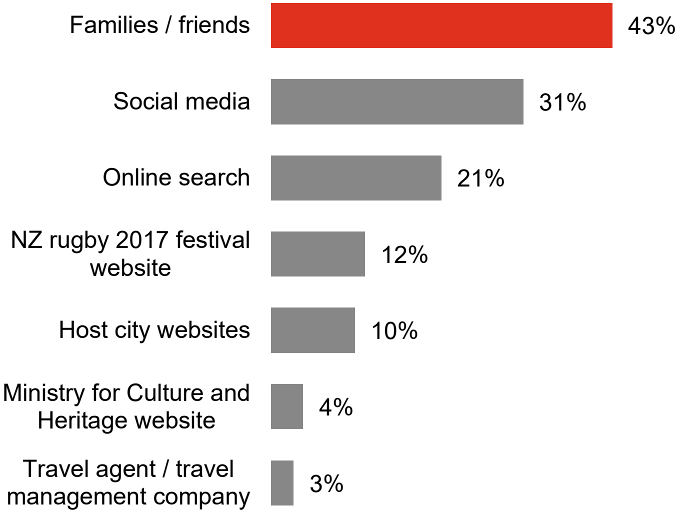
Proportion of total event attendees who planned to attend the event in advance(1)



That is 33% of event attendees did not plan to attend in advance, but came across the event 'organically' on the day

Base: New Zealanders aged 18 plus that attended an event | Sample size: n=257 | (1) Significant differences by demographic segment available in the complementary data tables

How event attendees that planned to attend in advance heard about the event(1)



Base: New Zealanders aged 18 plus who attended an event and planned to do so in advance | Sample size: n=170 | (1) Significant differences by demographic segment available in the complementary data tables

3.2

International reputation

In July 2017, Kantar TNS surveyed UK and Ireland residents to gauge their awareness and perceptions of the Series

Background

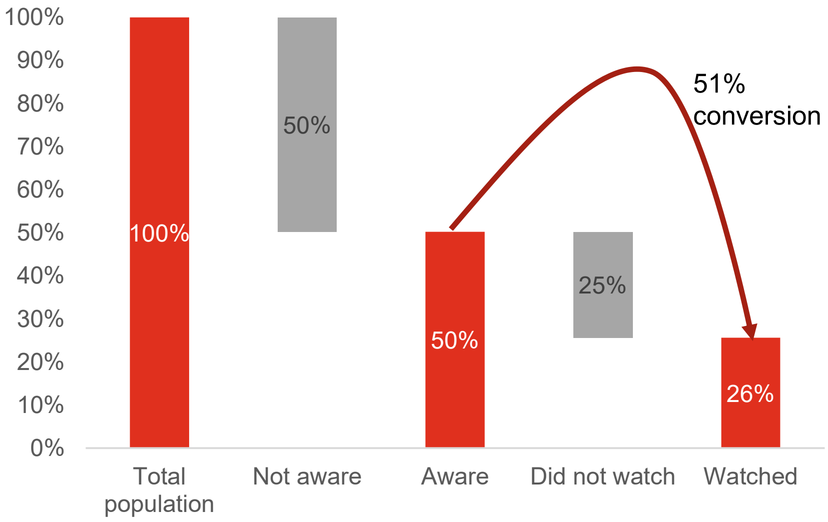
- Specifically, this section looks at the reputational impact of the Series among the international audiences, addressing key questions including:
  - awareness of the Series
  - broadcast viewership
  - perceptions of New Zealand among those aware of the Series on a range of attributes of interest to MBIE.

Research approach

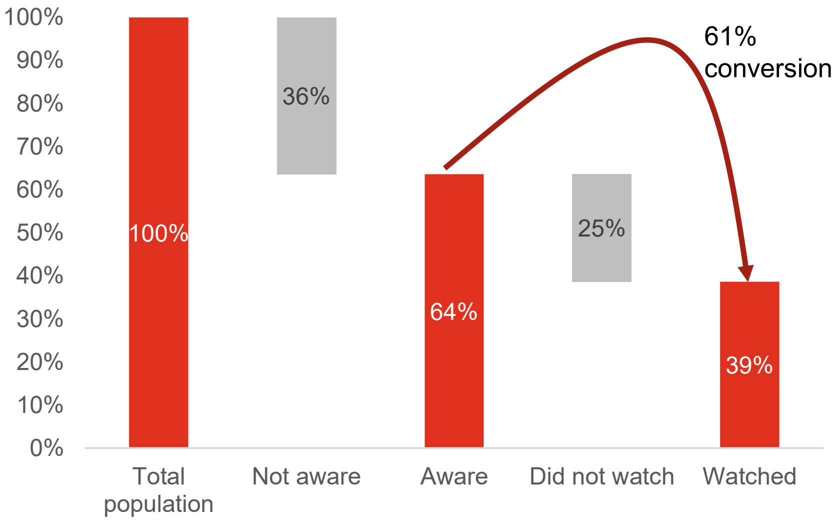
- Kantar TNS designed and conducted a 10 minute online survey of UK and Ireland residents aged 18 plus to answer these questions.
- The survey ran in market from 14 to 24 July 2017 (the Series itself ended on 8 July 2017).
- The data has been weighted by age, gender and region according to official national population estimates, to ensure the sample is representative of the target population.
- We surveyed 814 and 532 in the UK and Ireland respectively to gauge awareness of the Series; these people were surveyed at random from the Lightspeed online panels in these markets.
- Of those aware of the Series, 199 and 220 people from UK and Ireland respectively were randomly selected to complete the full 10 minute survey, which went in to detail about match TV viewership and perceptions of New Zealand as a result of the Series.
- Any tests of statistical significance have been conducted at the 90% confidence level.

With over 6 million viewers on Sky UK[1] the conversion rate from awareness to watching a match was higher in Ireland than the UK. Awareness was higher in general in Ireland than the UK

UK conversion[2]



Ireland conversion[2]

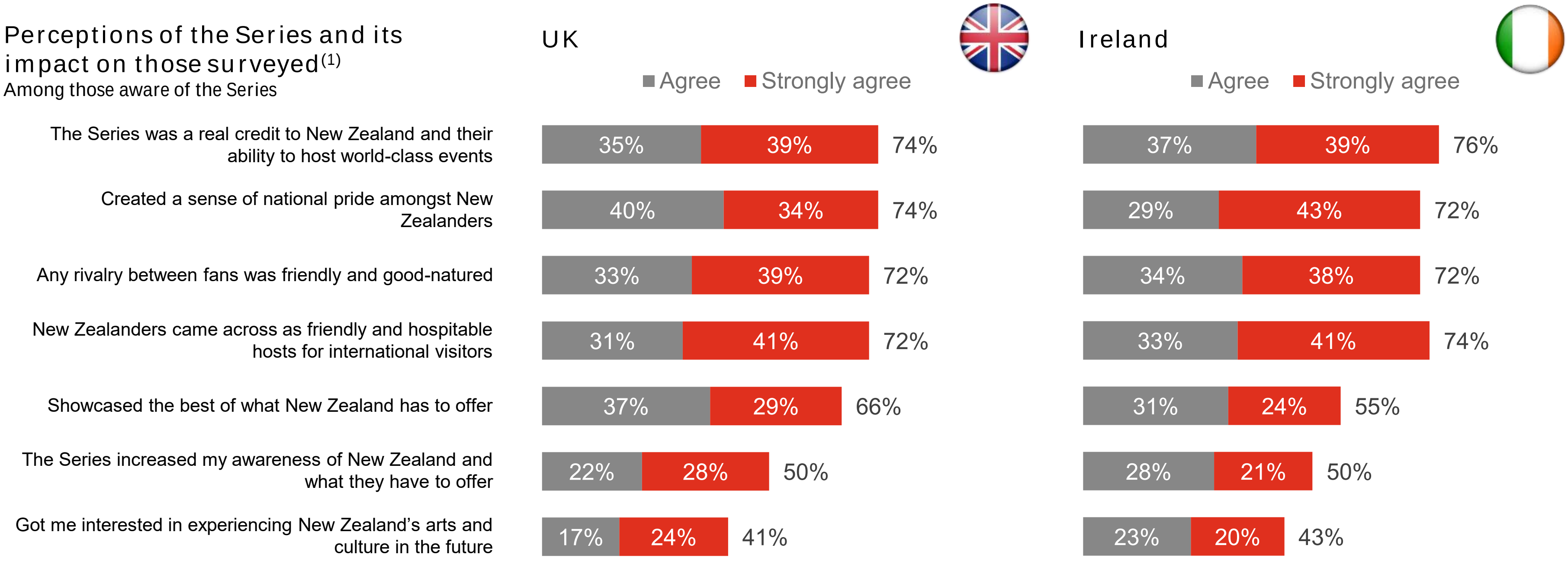


1. Source: Information provided by New Zealand Rugby.
2. Based on a sample of 419 UK and Irish residents over 18 years old.
3. Figures may not add due to rounding.

The Series had a positive impact on the perceptions that UK and Ireland adults have of New Zealand as a place that is capable of holding major events and hospitable for visitors

Perceptions of the Series and its impact on those surveyed[(1)]

Among those aware of the Series



Base: Surveyed UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220. Note that discrepancies of 1% for agree and strongly agree vs agree + strongly agree are due to rounding only | (1) Significant differences by demographic segment available in the complementary data tables

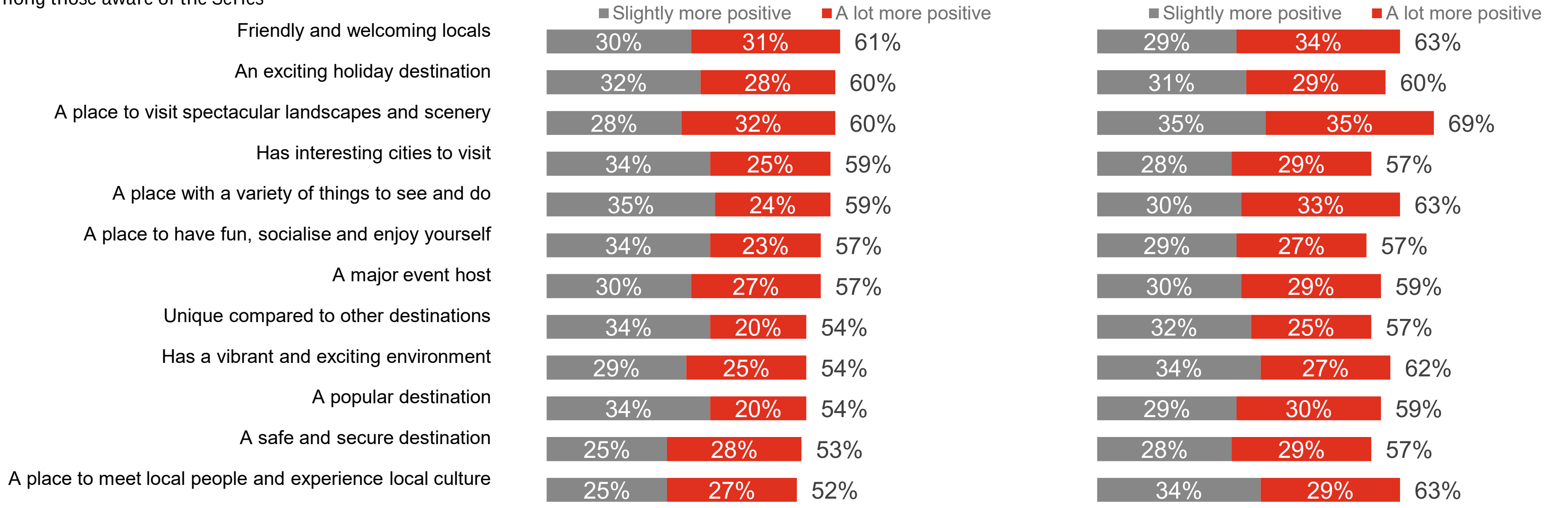
The Series positively impacted perceptions of New Zealand as a destination to visit

Perceptions of the Series and its impact on those surveyed[1]

Among those aware of the Series

UK

Ireland

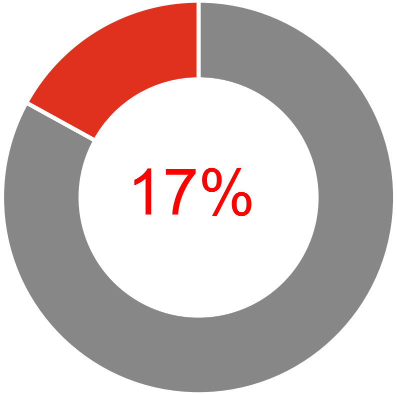


Base: Surveyed UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220. Note that discrepancies of 1% for agree and strongly agree vs agree + strongly agree are due to rounding only | (1) Significant differences by demographic segment available in the complementary data tables

Amongst those aware of the Series, 17% and 13% of UK and Ireland residents respectively are seriously considering a holiday in New Zealand in the next 3 years

UK – Incidence of Active Considerers[1]

Among those aware of the Series



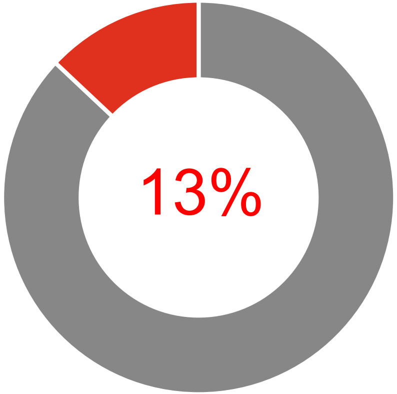
Significantly higher among…

- 35-54 year olds (24%)

Non-ACs are not completely closed to the idea of a New Zealand holiday – 62% said they would be more likely to visit New Zealand for a holiday as a result of the Series, but it hasn't quite been enough to turn them in to fully fledged ACs.

Ireland – Incidence of Active Considerers[1]

Among those aware of the Series



Significantly higher among…

- 18-34 year olds (21%)
- Munster residents (20%)

Non-ACs are not completely closed to the idea of a New Zealand holiday – 62% said they would be more likely to visit New Zealand for a holiday as a result of the Series, but it hasn't quite been enough to turn them in to fully fledged ACs.

Base: UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220 | (1) Significant differences by demographic segment available in the complementary data tables
Active Considerers have New Zealand on their list of preferred future holiday destinations. They are also aged over 18 and are willing to spend a minimum set amount on their holiday here. There is a specific list of criteria used by Tourism New Zealand to define an Active Considerer.

Visitor satisfaction

Kantar TNS surveyed international visitors who attended matches in person on their perspective of New Zealand. Visitors who attended matches in person were surveyed on their level of satisfaction with regards to their experiences during their visit to New Zealand. The survey asked visitors to rank each category within the range of 1 (not at all satisfied) to 10 (extremely satisfied).

How do you rate your visit with regards to:	1-5	6	7	8	9	10	Don't know	Did not experience	Total
The paid accommodation you experienced?	7%	6%	15%	27%	18%	22%	1%	5%	377
The food and beverage outlets you experienced?	6%	5%	20%	26%	18%	24%	1%	1%	377
The types of commercial transportation you experienced?	4%	2%	10%	26%	24%	27%	1%	6%	377
The activities you experienced?	4%	3%	7%	23%	25%	34%	1%	4%	377
The Maori activities you experienced?	5%	4%	6%	15%	17%	25%	3%	25%	377
The customer service you received?	2%	2%	9%	24%	20%	41%	1%	1%	377
Your sense of safety?	2%	1%	3%	14%	27%	**51%**	0%	1%	377
The shopping you did?	8%	10%	16%	26%	14%	17%	1%	8%	377
The festival events related to the Lions Series you experienced?	5%	5%	10%	20%	22%	29%	2%	8%	316
The Lions Series games you attended?	3%	2%	7%	16%	21%	**51%**	-	1%	377
New Zealand's natural and built environment overall?	2%	1%	5%	18%	23%	**47%**	1%	2%	377

Of those surveyed, the key observations are:

- Visitors were most satisfied with their sense of safety (51%), the Lions Series games (51%) & New Zealand's natural and built environment overall (47%).
- The lowest levels of visitor satisfaction were more commonly experienced with paid accommodation, food and beverage outlets and shopping, but the proportion is small relative to the number of people who rated their experience positively.
- 25% of people surveyed did not experience any Maori activities.

Source: Kantar TNS, 377 respondents

Visitor perceptions

Visitors who attended matches in person were directly surveyed on their perceptions of different categories that they may have experienced during their visit to New Zealand. The survey asked visitors to rank each category in terms of their expectations, from 'Worse than expected' to 'Better than expected'.

How do you perceive the following aspects of your trip:	Worse than expected	As expected	Better than expected
The variety of things to see and do in New Zealand was…	2%	42%	56%
In terms of cleanliness, New Zealand's environment was…	1%	47%	52%
The landscape and scenery in New Zealand was...	1%	30%	**69%**
Friendliness of the local people was...	-	26%	**74%**
New Zealand's food and beverage experience was...	**9%**	56%	35%
The opportunities to have unique experiences that can't be had anywhere else was	1%	48%	51%
The opportunities to have an authentic cultural experience in New Zealand were…	2%	57%	41%
The fun and enjoyment I had in New Zealand was...	-	33%	**67%**
The New Zealand culture was…	1%	52%	47%
The national pride of New Zealanders was…	2%	50%	48%
As a major event host, New Zealand was…	5%	36%	59%

Of those surveyed, the key observations are:

- Visitors' expectations were predominantly exceeded by the friendliness of the local people (74%), the New Zealand landscape and scenery (69%), and the level of fun and enjoyment experienced (67%).
- New Zealand's food and beverage experience was reported by 9% of visitors as being worse than expected.

Source: Kantar TNS, 377 respondents

Visitor retention

Visitors who attended matches in person were surveyed on the likelihood of them returning to New Zealand within the next 5 years or recommending New Zealand as a holiday destination to others. The survey asked visitors to rank each category within the range of 1 (not at all likely) to 10 (extremely likely).

How likely are you to visit New Zealand again for a holiday within the next 5 years?

Likelihood	Count	% of total
1	**45**	**12%**
2	12	3%
3	16	4%
4	6	2%
5	21	6%
6	20	5%
7	34	9%
8	33	9%
9	21	6%
10	**142**	**38%**
Don't know	27	7%
Total	**377**	**100%**

How likely are you to recommend New Zealand as a holiday destination to others

Likelihood	Count	% of total
1-5	**2**	**1%**
6	8	2%
7	17	5%
8	43	11%
9	47	12%
10	**256**	**68%**
Don't know	4	1%
Total	**377**	**100%**

Of those surveyed, the key observations are:

- 38% of visitors are extremely likely to return to New Zealand for a holiday within the next 5 years.
- Over two thirds of visitors (68%) are extremely likely to recommend New Zealand to others as a holiday destination to others, whilst only 1% of those surveyed are not likely to recommend New Zealand to others.

Source: Kantar TNS, 377 respondents

04

Summary

Summary – key economic measures estimated

	Whangarei	Auckland	Christchurch	Rotorua	Hamilton	Wellington	Rest of New Zealand	New Zealand total
Matches	1	3	1	1	1	2	1 (Dunedin)	10
Official attendance	19,700	138,600	20,600	28,200	30,000	77,200	26,700	341,000
International guest nights	9,200	168,400	27,300	35,500	24,400	78,000	202,200	545,000
Domestic guest nights	6,900	63,800	10,300	24,700	6,500	31,100	N/A	143,300
Total guest nights*	16,100	232,200	37,600	60,200	30,900	109,100	202,200	545,000
GDP (total impact)	$6.2m	$67.9m	$8.3m	$11.1m	$10.7m	$30.7m	$58.8m (Dunedin plus other New Zealand towns/cities)	$193.6m
FTE (total impact)	96	808	100	162	156	407	779 (Dunedin plus other New Zealand towns/cities)	2,507

*Domestic guest nights were excluded in the national economic impact analysis as these are assumed to be displacement from other spending within New Zealand. Domestic guest nights were included in the regional economic impact analysis as visitor driven economic benefits occurs.

Summary – key broader benefits

Perceptions		% strongly agree/agree
Of those aware of the Series, or those that weren't aware of the Series until they attended a related event:	Made me feel proud to be a New Zealander	59%
	Showcased the best of what New Zealand has to offer	52%
	Brought people together in my community	48%
Of those aware of the Series:	New Zealanders came across as friendly and hospitable hosts for international visitors	68%
	Any rivalry between fans was friendly and good-natured	65%
	The Series and festival were a real credit to New Zealand and our ability to host world-class events	64%
Of those aware of the Series, and that live in an event region:	Showcased the best of what my region has to offer	46%

Source: Kantar TNS, 1000 respondents

Summary – key broader benefits (continued)

	UK	Ireland
Awareness	50%	64%
TV Viewership	51%	61%
The Series was a real credit to New Zealand and its ability to host world-class events	74% agree or strongly agree	76% agree or strongly agree
Create a sense of national pride amongst New Zealanders	74% agree or strongly agree	72% agree or strongly agree
Incidence of Active Considerers	17%	13%
More likely to holiday in New Zealand	61% agree	67% agree
More likely to live in New Zealand	23% agree	20% agree
More likely to invest in New Zealand	12% agree	10% agree

Source: Kantar TNS, 419 respondents

Appendices

Appendix A - Restrictions

This post-series evaluation of the DHL New Zealand Lions Series 2017 has been prepared for the Ministry of Business, Innovation and Employment (MBIE). This report has been prepared solely for this purpose and should not be relied upon for any other purpose.

To the fullest extent permitted by law, PwC accepts no duty of care to any third party in connection with the provision of this Report and/or any related information or explanation (together, the "Information"). Accordingly, regardless of the form of action, whether in contract, tort (including without limitation, negligence) or otherwise, and to the extent permitted by applicable law, PwC accepts no liability of any kind to any third party and disclaims all responsibility for the consequences of any third party acting or refraining to act in reliance on the Information.

Our report has been prepared with care and diligence and the statements and opinions in the report are given in good faith and in the belief on reasonable grounds that such statements and opinions are not false or misleading. In preparing our report, we have relied on the data and information provided by the organisations listed on page 3 as being complete and accurate at the time it was given. We have not independently verified the accuracy of information provided to us, and have not conducted any form of audit in respect of the data. The views expressed in this report represent our independent consideration and assessment of the information provided.

No responsibility arising in any way for errors or omissions (including responsibility to any person for negligence) is assumed by us or any of our partners or employees for the preparation of the report to the extent that such errors or omissions result from our reasonable reliance on information provided by others or assumptions disclosed in the report or assumptions reasonably taken as implicit.

We reserve the right, but are under no obligation, to revise or amend our report if any additional information (particularly as regards the assumptions we have relied upon) which exists at the date of our report, but was not drawn to our attention during its preparation, subsequently comes to light.

This report is issued pursuant to the terms and conditions of the agreement for consultancy services, dated 27 April 2017 and variation of consulting services agreement dated 27 June 2017.

Appendix B

Economic modelling approach

Appendix B – Economic modelling approach

We used four online surveys to collect the information to analyse the economic impacts and broader benefits of the Series. Each survey had a different audience and different focus. We partnered with Kantar TNS to design the surveys, complete field work and survey individuals. The number of responses to each survey are listed below.

International tourism benefits

PwC and Kantar TNS developed an online survey to capture expenditure data from international tourists.

Kantar TNS collected over 1,400 email addresses outside match gates and at fan zones, targeting supporters wearing Lions fan attire (eg red jerseys) and sent them the link to the online survey. International visitors on New Zealand Rugby's ticket database were also contacted.

We had 377 responses to our survey.

Domestic tourism benefits

PwC and Kantar TNS developed an online survey to capture expenditure data from domestic tourism – New Zealanders travelling from their home city or town to other cities to watch Lions matches.

New Zealand Rugby sent a link to the survey to all individual ticket purchasers.

We had 299 responses to our survey.

International reputation benefits

Kantar TNS developed an online survey to capture the thoughts and enhanced perceptions of potential visitors in key business and tourism markets: the UK and Ireland.

Kantar TNS sent the survey to the Lightspeed online panel of individuals in the UK and Ireland and received 419 responses.

Domestic reputation benefits

Kantar TNS developed an online survey to capture the thoughts and perceptions of New Zealanders resulting from the Series.

Kantar TNS sent the survey to the ConsumerLink online panel of individuals in New Zealand and received 1,000 responses.

Appendix B – Economic modelling approach (continued)

This section provides a detailed overview of our approach and method, including definitions of our main economic impact measures, a discussion of our main data sources, and an explanation of how we calculated direct and total economic impacts.

Measures of economic impact

This report uses two main indicators of economic impact: value added and employment. It relies on input-output (multiplier) analysis to estimate the indirect and induced impacts of the Series.

Value added

The value added of an industry is equal to the total value created within that industry. It can also be described as the GDP impact of an industry or event. It measures the contributions of labour (through wages and salaries) and capital (through profits and depreciation) to the output produced by the industry, and the taxes paid by the industry. As a result, it is equivalent to the gross output of an industry, less the value of all inputs purchased from other industries.

Employment

We measure employment on the basis of FTEs, rather than total (full-time and part-time) jobs or headcount. Under this measure, part-time jobs are counted as a proportion of a full-time job – so, for example, a job that involved working 20 hours a week would be counted as 0.5 of an FTE. This provides us with the most comparable measure of employment in an industry, as rates of part-time employment can vary between different industries.

The GDP and employment impacts are linked. The employment impact can be interpreted as the amount of employment which supports the GDP impact. Some of these jobs will have occurred in the lead up to the tour and others during the tour itself. Some could have been short-term positions created and some may be extensions of long-term jobs (eg overtime).

Gross output

The gross output of an industry is equal to its total sales revenue. This figure incorporates both value created within that industry and the value of intermediate goods (eg raw materials, real estate, equipment and machinery) purchased by the industry from other industries.

Although gross output or sales revenue is commonly used as a measure of the value of an industry, it is an imperfect measure due to its inclusion of inputs purchased from other industries and the inherent double counting. However, we use gross output as the basis of our analysis to estimate value added and employment.

Appendix B – Economic modelling approach (continued)

Data sources

Main quantitative data sources

Our key quantitative data sources involved primary research through three surveys, information directly from the British and Irish Lions, and information directly from New Zealand Rugby and hosts:

1. survey of international visitors
2. survey of domestic tourists
3. international Visitor Survey (IVS) screener data
4. expenditure data from the British and Irish Lions
5. expenditure data from New Zealand Rugby, All Blacks Hospitality, Sport New Zealand, regional hosts
6. ticketing data from New Zealand Rugby, All Blacks Hospitality.

Kantar TNS assisted with the development of the two surveys and delivery through their online survey tools. The purpose of the surveys was to gain an insight into visitors; the length of stay and expenditure of international and domestic tourists in New Zealand. These were used for the economic modelling. Other information was also collected to form a broad understanding of the Series. Copies of the surveys are available upon request.

International survey

Respondents for the international visitor survey were selected by targeting attendees at each match, who were wearing Lions fan attire. Kantar TNS screened fans wearing red jerseys to identify those who were international visitors and willing to take part in our study, from which the potential survey respondents' email addresses were collected. A web link to the survey was sent to these 1,400 email addresses. This process was completed from 1 June until 8 weeks after the conclusion of the Series (approximately three months later) to capture late departing visitors. 377 individuals responded to the survey.

Domestic survey

New Zealand Rugby sent the link for the online domestic survey to all individual ticket purchasers in New Zealand.

The survey contained questions on whether the individual purchased the ticket, attendance of matches in the city in which they live and/or other cities as well as expenditure on their trip.

To boost the sample size, Kantar TNS sent the survey to a random sample of New Zealand adults as part of the online ConsumerLink panel. This yielded an additional 6 responses, giving an overall total of 299 responses for the domestic survey.

Appendix B – Economic modelling approach (continued)

Secondary data sources

We used a number of other data sources in our analysis, including:

- Stats NZ's Input-Output Tables for the 2012-13 year
- Stats NZ's Annual Enterprise Survey dataset
- MBIE's International Visitor Survey (IVS)
- Butcher Partners' national and city-specific multiplier tables for the 2012-2013 year.

Kantar TNS inserted an additional question into the IVS. Kantar TNS screens and collects email addresses from departing visitors airside at airports for Stats NZ's IVS. By including a question on the visit causation in the screening, it was possible to calculate the proportion of visitors that were in New Zealand for the Series and therefore we estimated the total visitors for the Series when this percentage was extrapolated to the overall number of international tourists to New Zealand.

Avoiding double counting

We avoid double counting expenditure streams by only including expenditure directly relating to procuring goods and services. For example, if Organisation A provides $100,000 to Organisation B, and Organisation B spends the $100,000 on marketing and advertising, this is only counted as one transaction by Organisation B.

Main qualitative data sources

Kantar TNS also prepared two surveys to understand the broader benefits of the Series:

- Reputation survey of New Zealand adults – covering the awareness of the Series and relative festival events and the perceptions that New Zealand adults have of New Zealand as a place capable of holding major events, and how well it showcased the host regions and New Zealand as a whole.
- Reputation survey of UK and Irish adults – covering the awareness and perceptions that UK and Ireland adults have of New Zealand as a place capable of holding major events, and as a place to holiday, work, study, live or invest.

Domestic and international survey response summary tables and copies of each questionnaire are available upon request.

Appendix B – Economic modelling approach (continued)

Multiplier analysis

Direct, indirect and total impacts

All industries have spillover effects on other parts of the New Zealand economy. For the purposes of this report, indirect impacts occur as a result of purchases of goods and services from other industries.

For example, a restaurant purchases a range of inputs to run its business: advertising services, menus, fresh produce, kitchen equipment, real estate, water and electricity, etc.

The upstream effects are the indirect impacts.

Estimating direct economic impacts

We estimate the direct impact of the Series in terms of its contribution to value added and employment as follows:

1. Obtain expenditure data by category for tourists and hosting related expenditure. For example, groceries, retail, accommodation or transport for tourists; and advertising, match-day entertainment, food and beverage services for hosting and leverage expenditure.
2. Match expenditure categories to input-output multiplier categories.
3. Adjust expenditure data for imported goods and services and wholesale/retail margins.
4. Apply the ratios of value added (VA) to gross output (GO) and VA (or GO) to employment in these industries. These ratios were then used to estimate direct GDP and full-time equivalent employment (FTE) for each category.

Estimating total economic impacts

Spending on the Series has multiplier effects in other industries as a result of the way in which that spending flows through the economy. Every dollar that is spent directly on the hosting or enjoying the Series will also stimulate or support other types of economic activity.

In order to estimate flow-on effects, we applied multipliers calculated using 2012/13 input-output tables for all New Zealand industries, which are the latest available. Multipliers were available for gross output, value added, and employment in these industries.

Indirect impacts were estimated using Type 1 multipliers, which account for the first-round and indirect effect of purchases of goods and services by each industry.

The total economic impact is the sum of the direct and indirect economic impacts.

We have not estimated induced impacts in our analysis. We do not consider this is an appropriate measure to analyse and report, for the purposes of this evaluation. The key reason for this is potential alignment to cost-benefit analysis. Initially cost-benefit analysis was proposed as the evaluation tool, in line with MBIE's Post Event Evaluation Guidelines, but a decision was reached to instead prepare an economic impact analysis. Note that the financial information that New Zealand Rugby has provided is confidential to PwC. Therefore if this option was to be pursued it would require further discussion.

Appendix B – Economic modelling approach (continued)

Adjustments

Import propensity

Expenditure on imported goods and services does not impact on the New Zealand economy, as these cash flows are diverted overseas. As such, an adjustment for imported goods and services is required in the analysis and we deduct the value of imported content from our expenditure estimates.

Stats NZ's input-output tables for the 2012-13 year were used for the adjustment. The percent of total output which is made up of imports, for each multiplier category were used to deduct the import content for each expenditure category. The national percentages were also applied to the host city data as this information is not available at a city or regional level.

Retail and wholesale margin adjustments

For multiplier categories relating to retail or wholesale trade eg supermarket and groceries, it is necessary to estimate the retail or wholesale margin for the analysis.

We used Stats NZ's Annual Enterprise Survey to estimate the relevant retail or wholesale trade margin for the analysis. The national percentages were also applied to the host city data as this information is not available at a city or regional level.

Extrapolation from the survey to the population

It was necessary to extrapolate from the survey sample to the population for the international and domestic tourism economic impacts.

We used ticketing data from New Zealand Rugby to capture the total ticket sales and proportions of tickets which were sold to domestic (own city), domestic (other city), and international purchasers, for each match.

We assumed that the survey sample was representative of the overall population of the ticket purchasers and extrapolated the results on this basis.

Assumptions

Ultimately, the purpose of Part 1 and 2 of our methodology was to take raw survey data, complete a first level of analysis and produce summary statistics that were used for the national and regional cost benefit analysis. Our analysis was underpinned by the following assumptions:

1. UK-based operators made a 20% margin on packages sold to international visitors. This is expenditure which is retained in the UK and does not impact New Zealand's economy. This assumption is based on ONS data on margins for the Series arrangement services in the UK.
2. The majority of International air travel did not accrue to New Zealand. We allocated the share of expenditure on international air travel by Air New Zealand's share of total international flights into New Zealand from our survey.

Appendix B – Economic modelling approach (continued)

Regional economic impact analysis

Direct, indirect and total impacts

We also completed analysis for the following six host cities: Whangarei, Auckland, Rotorua, Hamilton, Wellington and Christchurch. Our approach to the regional EIA was similar to the national EIA, assessing the relevant and material costs and benefits to the host region, whilst making relevant import and retail or wholesale margin adjustments. City-specific multipliers are used in the host city analysis.

Whereas domestic tourism is excluded from the national EIA on the basis that the expenditure is displaced from other expenditure in New Zealand, the regional analysis included New Zealand residents who travelled to a different region for the Series. We used the data collected in the domestic survey to identify the expenditure by domestic tourists. PwC identified the costs owing to the host region. This was easily defined for some items, such as the investment made by local authorities. However, others were pro-rated based off national figures, using either the proportion of total Series tickets sold or total guest nights to allocate the national figures to a regional basis.

The overall approach for the regional economic analysis is broadly the same as the approach for the national analysis. Differences are highlighted in the table below.

Inclusions and exclusions for modelling approach

	National EIA	Host city EIAs
International tourism	Y	Y – pro-rated by total guest nights in each host city (after removing guest nights from international visitors in non-host cities)
Domestic tourism	N – assumed to be displaced expenditure within New Zealand	Y – assumed to be additional expenditure to a host city *Note: only expenditure by New Zealanders within New Zealand but outside their home city is included*
Hosting and leverage (national)	Y – assumed to be integral to the success of the Series	Y – pro-rated by ticket sales (total)
Hosting and leverage (city)	N – assumed to be displaced expenditure on other New Zealand events at a national level.	Y – assumed to be additional expenditure integral to the success of the Series from a city-perspective. *Note: only expenditure by host cities on vendors based in the same city is included. Spend on vendors outside the host city but within New Zealand could be included in other city analyses but the value of this spend is immaterial to the analysis.*

Appendix B – Economic modelling approach (continued)

Regional economic impact analysis

Ticketing data analysis

In order to identify the proportion of tickets which were sold to home-city residents, domestic tourists and international tourists we analysed ticketing data from New Zealand Rugby, and All Blacks Hospitality, who were able to provide a breakdown of the purchaser's origin for most of the tickets sold.

We made the following assumptions for the ticketing data:

- Tickets broken down by region were assumed to be purchased by residents in the host city eg tickets sold to purchasers in Waikato were assumed to be in Hamilton.
- Tickets sold by All Blacks Tours had a similar pattern of home-city/domestic tourist/international tickets as the tickets sold by All Blacks Hospitality.
- VIP and Sponsor tickets were assumed to have the following profile: 33% Auckland, 33% Wellington and 33% overseas.
- Provincial/Super Rugby team tickets were all home-city tickets.
- Unless suggested otherwise in ticketing notes, tickets purchased by residents with a Wellington postal address were assumed to be purchased by Wellington residents (and similarly for other host city areas).

Note: the rest of New Zealand has been calculated as the difference between the New Zealand total and host city impacts.

All Blacks Tours, which had exclusive rights to sell travel and accommodation coupled with match tickets for the rest of the world outside the European Union, is likely to have a higher proportion of sales to overseas visitors than All Blacks Hospitality, which focuses on hospitality packages in the domestic market. We completed sensitivity testing on the assumption around the profile of tickets sold by All Blacks Tours. If it is assumed that all tickets sold by All Blacks Tours were sold to overseas purchasers, recalculation of the results does not materially affect the overall outcome, due to the relatively small number of tickets sold through this channel.

Appendix B – Economic modelling approach (continued)

Official venue capacity – (maximum seats for that match configuration)

Venue	Capacity
Whangarei	19,720
Auckland (Blues)	45,860
Christchurch	20,635
Dunedin	28,296
Rotorua	28,193
Hamilton	29,984
Auckland (Test 1)	48,713
Wellington (Hurricanes)	39,916
Wellington (Test 2)	39,429
Auckland (Test 3)	48,709
Total	**349,455**

Appendix C

Detailed results & other information

Appendix C – Detailed results

Summary of regional expenditure broken down by category on a per person per night basis ($NZD)

Data source	Location	Expenses at the match	Restaurants, bars, cafes	Groceries	Accommodation	Car hire	Local public transport	Intercity ground transportation	Domestic airfares	Retail shopping	Attractions and activities	Total
Regional expenditure by domestic tourists	Whangarei	63	46	-	38	20	16	-	16	11	11	222
	Auckland	23	69	5	65	8	10	1	49	22	3	255
	Rotorua	29	61	7	48	8	1	-	7	3	7	170
	Hamilton	33	64	2	32	5	3	-	-	10	-	150
	Wellington	30	79	2	38	8	10	2	34	11	2	216
	Christchurch	17	87	32	32	55	4	-	44	25	10	306
	Dunedin	36	111	9	51	41	2	-	37	14	3	303
Expenditure by international tourists	Average across NZ cities/towns	14	63	9	116	49	8	10	26	21	17	332

*Figures may not add due to rounding.

Appendix C – Detailed results (continued)

Regional economic contribution to the series through tourism, hosting and leverage activities

Whangarei ($GDPm)

Category	Subtotal
International airfares	$1.4m
Domestic travel	$1.0m
Accommodation	$1.7m
Food & beverages	$1.3m
Attractions and activities	$0.2m
Retail shopping	$0.1m
Hireage and security	$0.0m
Hosting and leverage	$0.5m
Total	$6.2m

Whangarei (FTEs)

Category	Subtotal
International airfares	10
Domestic travel	8
Accommodation	32
Food & beverages	34
Attractions and activities	4
Retail shopping	1
Hireage and security	0
Hosting and leverage	7
Total	96

Auckland ($GDPm)

Category	Subtotal
International airfares	$14.8m
Domestic travel	$10.4m
Accommodation	$18.0m
Food & beverages	$13.4m
Attractions and activities	$2.0m
Retail shopping	$0.7m
Hireage and security	$0.2m
Hosting and leverage	$8.4m
Total	$67.9m

Auckland (FTEs)

Category	Subtotal
International airfares	111
Domestic travel	71
Accommodation	241
Food & beverages	242
Attractions and activities	28
Retail shopping	9
Hireage and security	1
Hosting and leverage	104
Total	808

Rotorua ($GDPm)

Category	Subtotal
International airfares	$2.2m
Domestic travel	$1.7m
Accommodation	$3.2m
Food & beverages	$2.7m
Attractions and activities	$0.4m
Retail shopping	$0.1m
Hireage and security	$0.0m
Hosting and leverage	$0.8m
Total	$11.1m

Rotorua (FTEs)

Category	Subtotal
International airfares	17
Domestic travel	12
Accommodation	52
Food & beverages	61
Attractions and activities	8
Retail shopping	1
Hireage and security	0
Hosting and leverage	9
Total	162

*Figures may not add due to rounding.

Appendix C – Detailed results (continued)

Regional economic contribution to the series through tourism, hosting and leverage activities

Hamilton ($GDPm)

Category	Subtotal
International airfares	$2.5m
Domestic travel	$1.7m
Accommodation	$3.1m
Food & beverages	$2.3m
Attractions and activities	$0.4m
Retail shopping	$0.1m
Hireage and security	$0.0m
Hosting and leverage	$0.7m
Total	$10.7m

Wellington ($GDPm)

Category	Subtotal
International airfares	$6.4m
Domestic travel	$4.9m
Accommodation	$8.0m
Food & beverages	$6.6m
Attractions and activities	$1.0m
Retail shopping	$0.3m
Hireage and security	$0.1m
Hosting and leverage	$3.5m
Total	$30.7m

Christchurch ($GDPm)

Category	Subtotal
International airfares	$2.0m
Domestic travel	$1.3m
Accommodation	$2.2m
Food & beverages	$1.5m
Attractions and activities	$0.3m
Retail shopping	$0.1m
Hireage and security	$0.0m
Hosting and leverage	$0.9m
Total	$8.3m

Hamilton (FTEs)

Category	Subtotal
International airfares	19
Domestic travel	12
Accommodation	54
Food & beverages	55
Attractions and activities	5
Retail shopping	2
Hireage and security	0
Hosting and leverage	9
Total	156

Wellington (FTEs)

Category	Subtotal
International airfares	35
Domestic travel	28
Accommodation	131
Food & beverages	157
Attractions and activities	12
Retail shopping	5
Hireage and security	0
Hosting and leverage	39
Total	407

Christchurch (FTEs)

Category	Subtotal
International airfares	15
Domestic travel	10
Accommodation	29
Food & beverages	28
Attractions and activities	4
Retail shopping	1
Hireage and security	0
Hosting and leverage	12
Total	100

*Figures may not add due to rounding.

2% of New Zealand adults surveyed claimed to have attended at least one Whangarei event and the most widely attended event was the Waitangi Treaty Grounds

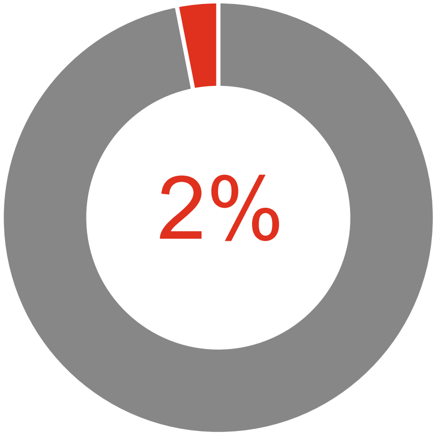
Incidence of surveyed New Zealanders attending at least one Whangarei event

The 2% that attended at least one event is made up of …

Residents	
Attended a match	7%
Did not attend a match	16%
Visitors (last six weeks)	
Attended a match	19%
Did not attend a match	58%

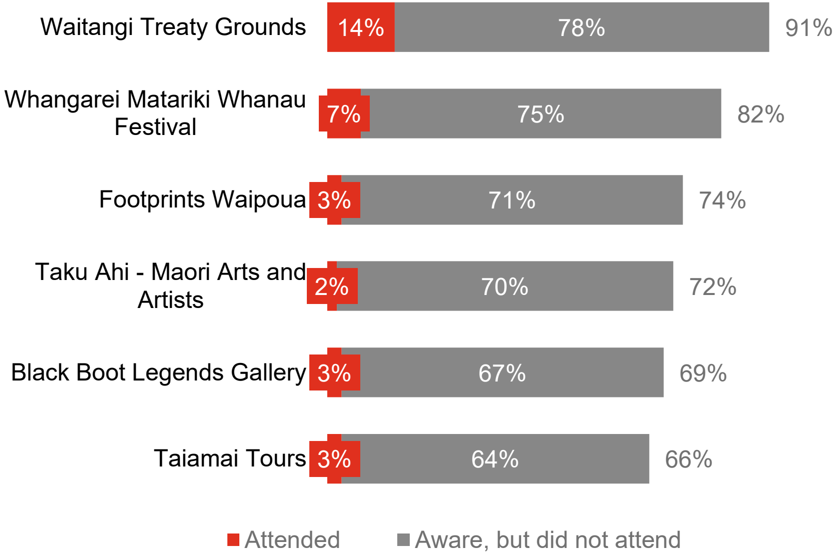
Significantly higher among:
- Males (3%)
- North Island residents (2%)
  - Northland (18%)
- Other ethnicity (5%)

Significantly lower among:
- Females (1%)
- South Island residents (<0.01%)
- New Zealand European (1%)



Base: New Zealanders aged 18 plus | Sample size n=1000

Awareness and attendance of individual events by people that were in Whangarei at the time



Base: New Zealanders aged 18 plus that live in Whangarei, plus people that visited Whangarei during the Series
Sample size: 91

12% of New Zealand adults surveyed claimed to have attended at least one Auckland event and the most widely attended event was a Rugby Fanzone

Incidence of surveyed New Zealanders attending at least one Auckland event

The 12% that attended at least one event is made up of …

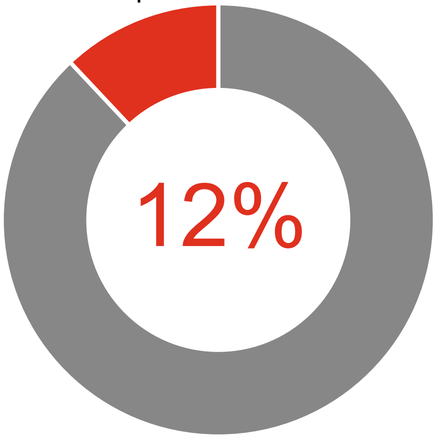
Residents	
Attended a match	17%
Did not attend a match	48%
Visitors (last six weeks)	
Attended a match	14%
Did not attend a match	21%

Significantly higher among:

- Males (15%)
- 18-29 years (19%)
- North Island residents (14%)
  - Auckland (24%)
- Other ethnicity (29%)

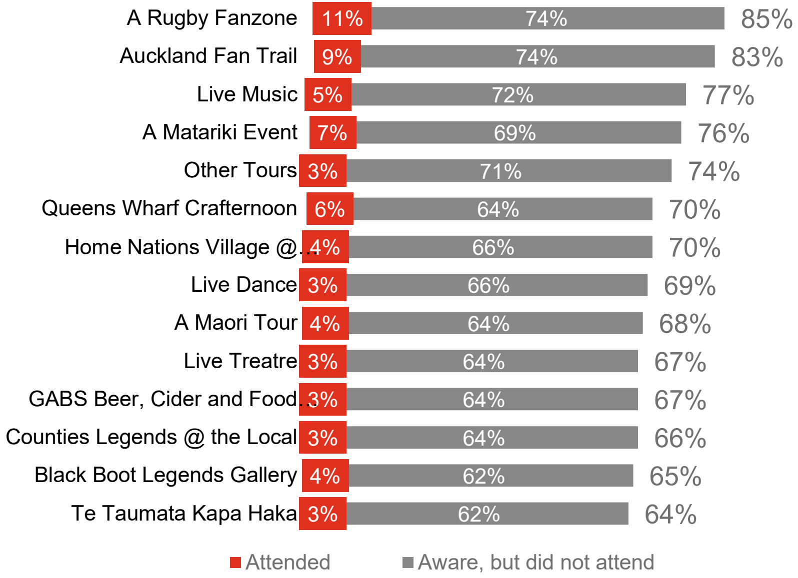
Significantly lower among:

- Females (9%)
- 50-59 years (7%)
- 70+ years (5%)
- South Island residents (3%)
- New Zealand European (9%)



Base: New Zealanders aged 18 plus | Sample size n=1000

Awareness and attendance of individual events by people that were in Auckland at the time



Base: New Zealanders aged 18 plus that live in Auckland, plus people that visited Auckland during the Series
Sample size: 497

7% of New Zealand adults surveyed claimed to have attended at least one Hamilton event and the most widely attended event was Hamilton Gardens

Incidence of surveyed New Zealanders attending at least one Hamilton event

The 7% that attended at least one event is made up of …

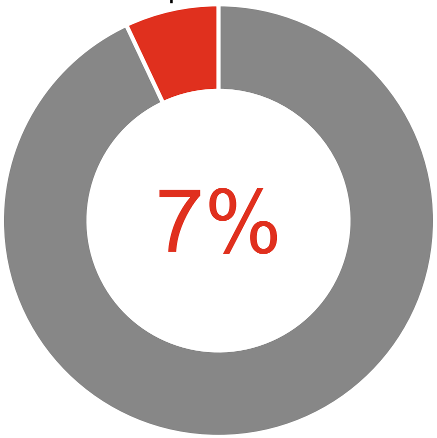
Residents	
Attended a match	4%
Did not attend a match	16%
Visitors (last six weeks)	
Attended a match	11%
Did not attend a match	69%

Significantly higher among:

- 18-29 years (11%)
- North Island residents (10%)
  - Waikato (32%)
- Other ethnicity (21%)

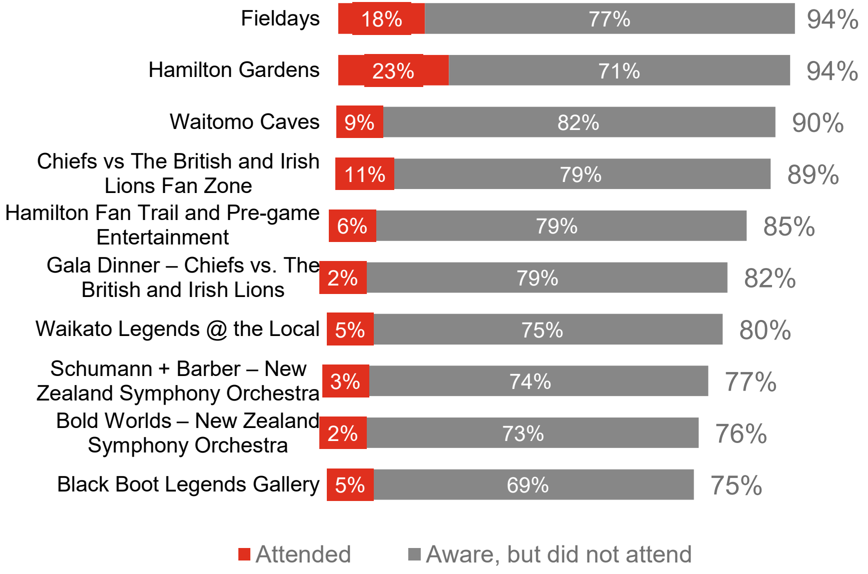
Significantly lower among:

- 70+ years (4%)
- South Island residents (1%)
- New Zealand European (6%)



Base: New Zealanders aged 18 plus | Sample size n=1000

Awareness and attendance of individual events people that were in Hamilton at the time



Base: New Zealanders aged 18 plus that live in Hamilton, plus people that visited Hamilton during the Series
Sample size: 191

3% of New Zealand adults surveyed claimed to have attended at least one Rotorua event and the most widely attended event was the Rotorua Night Market

Incidence of surveyed New Zealanders attending at least one Rotorua event

The 3% that attended at least one event is made up of … (1)

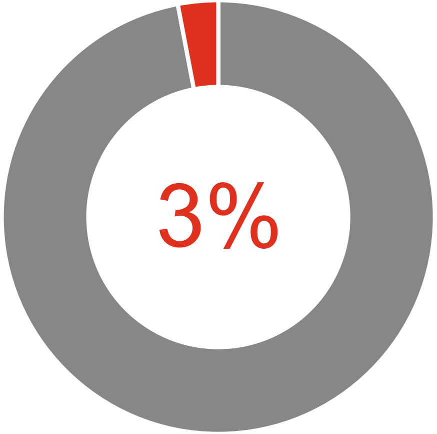
Residents	
Attended a match	--
Did not attend a match	--
Visitors (last six weeks)	
Attended a match	94%
Did not attend a match	6%

Significantly higher among:

- 18-29 years (8%)
- North Island residents (4%)
  - Auckland (5%)
- Other ethnicity (7%)

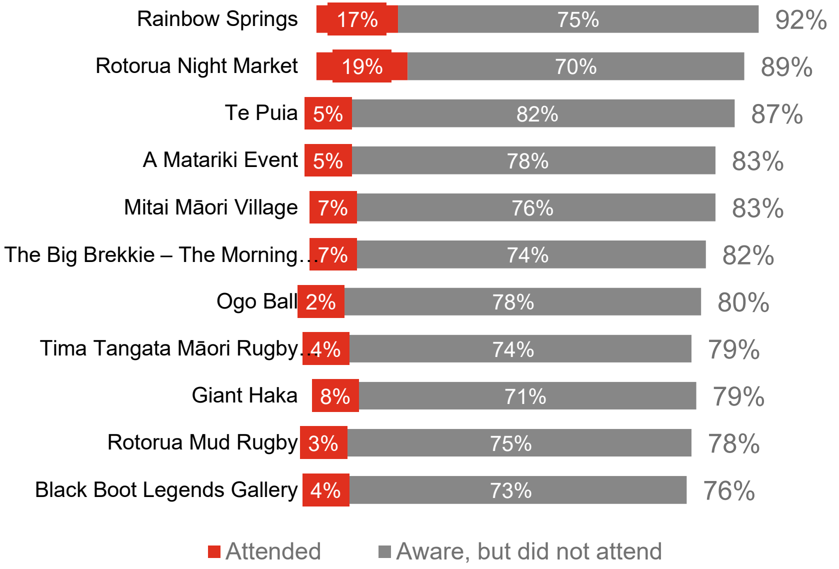
Significantly lower among:

- South Island residents (0%)
- New Zealand European (3%)



Base: New Zealanders aged 18 plus | Sample size n=1000 | (1) -- = 0%, i.e. among of our event attendees, we did not pick up any Rotorua residents, which is not unexpected given total event attendance is just 3%

Awareness and attendance of individual events by people that were in Rotorua at the time



Base: New Zealanders aged 18 plus that live in Rotorua, plus people that visited Rotorua during the Series
Sample size: 107

9% of New Zealand adults surveyed claimed to have attended at least one Wellington event and the most widely attended event was an exhibition at Te Papa

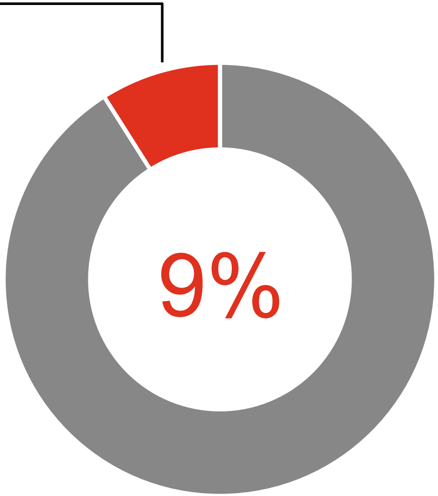
Incidence of surveyed New Zealanders attending at least one Wellington event

The 9% that attended at least one event is made up of …

Residents	
Attended a match	8%
Did not attend a match	23%
Visitors (last six weeks)	
Attended a match	14%
Did not attend a match	55%

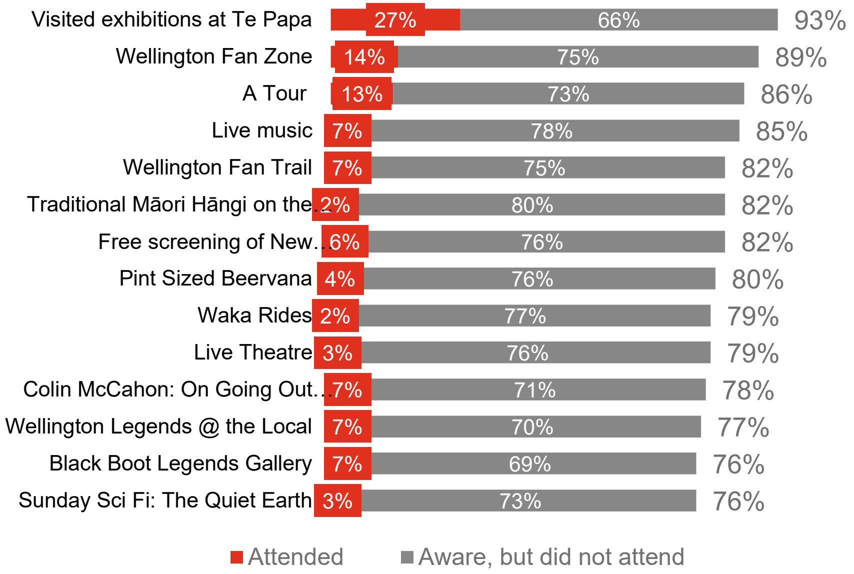
Significantly higher among:
- 18-29 years (13%)
- 50-59 years (12%)
- North Island residents (10%)
  - Wellington (38%)
- Other ethnicity (13%)

Significantly lower among
- 60-69 years (4%)
- 70+ years (1%)
- South Island residents (6%)
- HHI[(1)] up to $40K (4%)
- New Zealand European (8%)



Base: New Zealanders aged 18 plus | Sample size n=1000 | (1) HHI = household income

Awareness and attendance of individual events by people that were in Wellington at the time



Base: New Zealanders aged 18 plus that live in Wellington, plus people that visited Wellington during the Series
Sample size: 206

4% of New Zealand adults surveyed claimed to have attended at least one Christchurch event and the most widely attended events were the Christchurch Fanzone and the SCAPE public art walkway

Incidence of surveyed New Zealanders attending at least one Christchurch event

The 4% that attended at least one event is made up of …

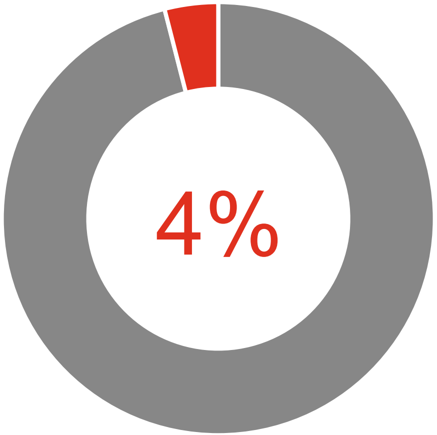
Residents	
Attended a match	--
Did not attend a match	--
Visitors (last six weeks)	
Attended a match	48%
Did not attend a match	52%

Significantly higher among:

- 18-29 years (8%)
- South Island residents (11%)
  - Canterbury (16%)
- HHI[(2)] of $80-120K (6%)

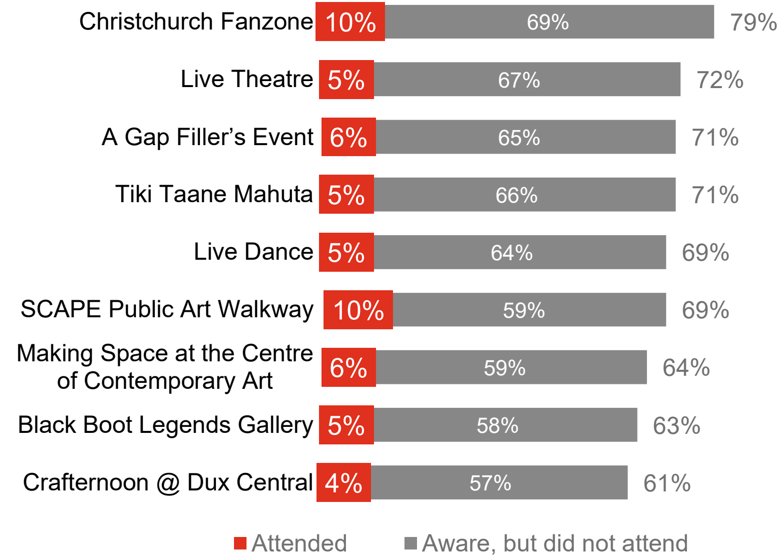
Significantly lower among:

- 70+ years (1%)
- North Island residents (2%)



Base: New Zealanders aged 18 plus | Sample size n=1000 | (1) -- = 0%, i.e. among of our event attendees, we did not pick up any Christchurch residents, which is not unexpected given total event attendance is just 4% | (2) HHI = household income

Awareness and attendance of individual events by people that were in Christchurch at the time



Base: New Zealanders aged 18 plus that live in Christchurch, plus people that visited Christchurch during the Series
Sample size: 208

2% of New Zealand adults surveyed claimed to have attended at least one Dunedin event and the most widely attended event was the Dunedin Fan Walk

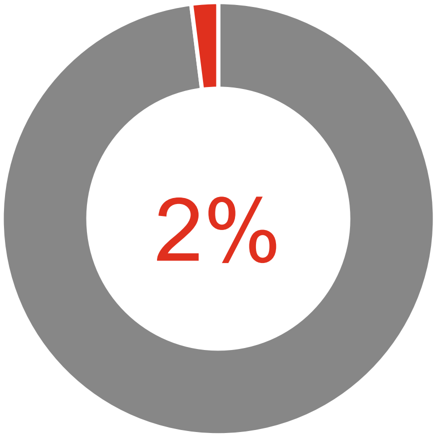
Incidence of surveyed New Zealanders attending at least one Dunedin event

The 2% that attended at least one event is made up of …

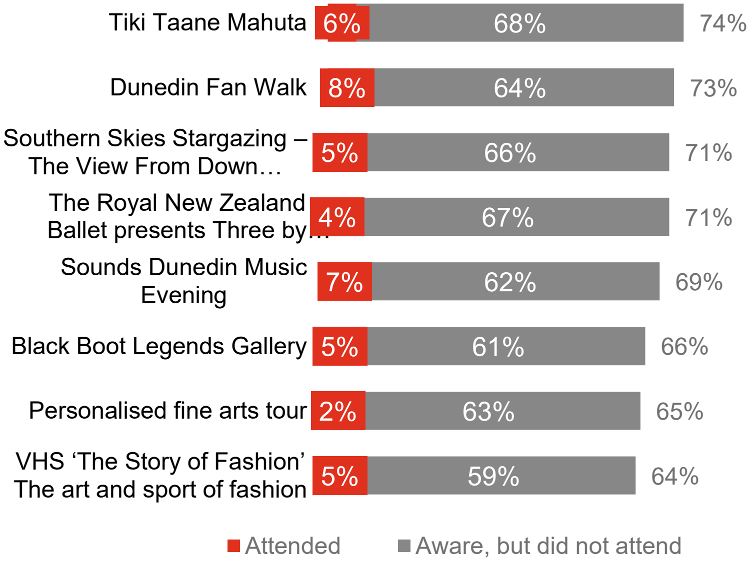
Residents	
Attended a match	8%
Did not attend a match	--
Visitors (last six weeks)	
Attended a match	50%
Did not attend a match	42%

Significantly higher among:
- Males (3%)
- 30-39 years (4%)
- South Island residents (6%)
  - Otago (17%)
- HHI(2) of $80-120K (4%)

Significantly lower among:
- Females (1%)
- North Island residents (1%)



Awareness and attendance of individual events by people that were in Dunedin at the time



Base: New Zealanders aged 18 plus | Sample size n=1000 | (1) -- = 0%, i.e. among of our event attendees, we did not pick up any Dunedin residents, which is not unexpected given total event attendance is just 2% | (2) HHI = household income

Base: New Zealanders aged 18 plus that live in Dunedin, plus people that visited Dunedin during the Series
Sample size: 110

Appendix C - The Series had broadly positive impacts on perceptions, and 22% of surveyed people that were aware of the Series and/or that attended an event are more interested in experiencing New Zealand arts and culture as a result

Perceptions of the Series and its impact on relevant statements

Base of people	Statements	% agree / strongly agree	% neutral	% disagree / strongly disagree
Aware of Series, or who weren't aware of the Series but attended a related event(1)	Made me feel proud to be a New Zealander	59%	24%	11%
	Showcased the best of what New Zealand has to offer	52%	26%	12%
	Brought people together in my community	48%	26%	14%
	The festival events offered something for everyone, even if you don't like rugby	47%	27%	12%
	Got me interested in experiencing more of New Zealand's arts and culture in future	22%	34%	37%
	Got me more involved in experiencing New Zealand's arts and culture during the Series	18%	28%	45%
Aware of Series(2)	New Zealanders came across as friendly and hospitable hosts for international visitors	68%	20%	6%
	Any rivalry between fans was friendly and good-natured	65%	19%	6%
	The Series and festival were a real credit to New Zealand and our ability to host world-class events	64%	22%	7%
	The festival created a sense of excitement around the Series	57%	21%	11%
Aware of Series, and who live in an event region(3)(4)	Showcased the best of what my region has to offer	46%	30%	11%
Attended an event(5)	On the whole I really enjoyed the events I attended that were associated with the Series	58%	27%	8%

1. Sample size: n = 936. 2. Sample size: n = 923. 3. Sample size: n = 767. 4. Northland, Auckland, Waikato, Bay of Plenty, Wellington, Canterbury, or Otago. 5. Sample size n = 268

Appendix C - Perceptions are generally more favourable among surveyed 18-29 year olds

	Total	Male	Female	18-29	30-39	40-49	50-59	60-69	70+	North Island	South Island	Households with children	Adult-only households	Up to $40K	$40K to $80K	$80K to $120K	$120K plus	NZ European	Maori / Pasifika	Other
Perceptions (1)																				
Made me feel proud to be a New Zealander	59%	59%	59%	55%	56%	59%	60%	65%	61%	60%	54%	58%	60%	56%	61%	66%	61%	59%	63%	56%
Brought people together in my community	48%	50%	46%	51%	43%	48%	45%	50%	47%	49%	42%	47%	49%	47%	51%	49%	51%	47%	51%	49%
Show cased the best of w hat New Zealand has to offer	52%	50%	54%	50%	49%	52%	51%	58%	55%	53%	49%	52%	53%	46%	54%	60%	53%	53%	54%	48%
The festival events offered something for everyone, even if you don't like rugby	47%	46%	47%	43%	44%	49%	48%	47%	51%	49%	39%	45%	49%	42%	47%	56%	56%	46%	51%	47%
Got me more involved in experiencing New Zealand's arts and culture during the series	18%	22%	14%	26%	19%	16%	16%	17%	11%	18%	19%	19%	18%	15%	21%	15%	18%	16%	19%	29%
Got me interested in experiencing more of New Zealand's arts and culture in future	22%	24%	20%	30%	23%	21%	18%	21%	16%	23%	20%	24%	21%	19%	23%	24%	21%	20%	28%	33%
Total sample size for base:	*936*	*443*	*493*	*150*	*144*	*179*	*183*	*137*	*143*	*719*	*217*	*343*	*512*	*145*	*251*	*205*	*77*	*774*	*53*	*109*
Base = NZ residents aged 18+ and aware of series, or not aware of the series but attended an event																				
Perceptions (1)																				
The festival created a sense of excitement around the series	57%	54%	59%	52%	53%	58%	58%	66%	58%	60%	48%	56%	58%	52%	60%	57%	65%	57%	69%	53%
The series and festival w ere a real credit to New Zealand and our ability to host w orld-class events	64%	62%	65%	58%	57%	63%	68%	73%	67%	65%	59%	63%	65%	62%	62%	69%	65%	65%	72%	49%
Any rivalry betw een fans w as friendly and good-natured	65%	69%	61%	59%	57%	68%	69%	72%	67%	64%	66%	65%	66%	63%	64%	67%	73%	66%	63%	56%
New Zealanders came across as friendly and hospitable hosts for international visitors	68%	68%	67%	57%	58%	68%	75%	77%	75%	68%	66%	65%	71%	63%	70%	67%	73%	69%	63%	58%
Total sample size for base:	*923*	*437*	*486*	*147*	*143*	*174*	*182*	*136*	*141*	*708*	*215*	*334*	*509*	*143*	*247*	*203*	*76*	*767*	*53*	*103*
Base = NZ residents aged 18+ and aware of series																				
Perceptions (1)																				
Show cased the best of w hat my region has to offer	46%	46%	46%	46%	39%	48%	43%	57%	45%	47%	41%	44%	47%	43%	48%	47%	54%	45%	50%	44%
Total sample size for base:	*767*	*369*	*398*	*134*	*122*	*148*	*153*	*98*	*112*	*596*	*171*	*295*	*404*	*109*	*199*	*168*	*71*	*618*	*48*	*101*
Base = NZ residents aged 18+, aware of series, and live in Northland, Auckland, Waikato, Bay of Plenty, Wellington, Canterbury, or Otago.																				
Perceptions (1)																				
On the w hole I really enjoyed the events I attended that w ere associated w ith the series	58%	56%	61%	58%	55%	59%	61%	66%	43%	57%	65%	64%	55%	62%	53%	69%	51%	60%	70%	49%
Total sample size for base:	*268*	*131*	*137*	*58*	*42*	*56*	*52*	*35*	*25*	*222*	*46*	*104*	*144*	*32*	*66*	*70*	*19*	*196*	*19*	*53*
Base = NZ residents aged 18+ and attended an event																				

(1) % = proportion that agree or strongly agree w ith this statement

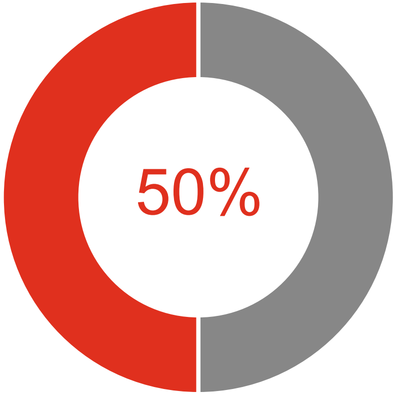
Significantly higher than for people not in this segment at 90% confidence

Significantly low er than for people not in this segment at 90% confidence

Appendix C – Of those surveyed, awareness of the Series is higher in Ireland than UK at 64% and 50% respectively; males and older residents aged 55 years or over are more likely to be aware of the Series

UK – Awareness of the Series

Among residents aged 18 plus



Significantly higher among:

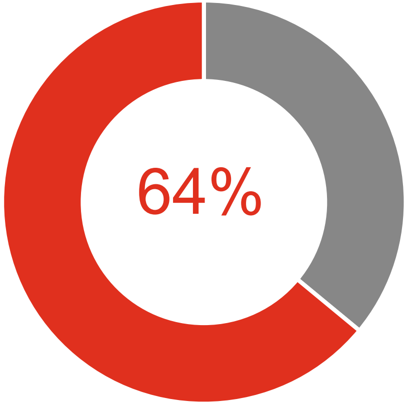
- Males (67%)
- 55+ years (56%)

Significantly lower among:

- Females (35%)
- 35-54 years (45%)

Ireland – Awareness of the Series

Among residents aged 18 plus



Significantly higher among:

- Males (74%)
- 55+ years (75%)

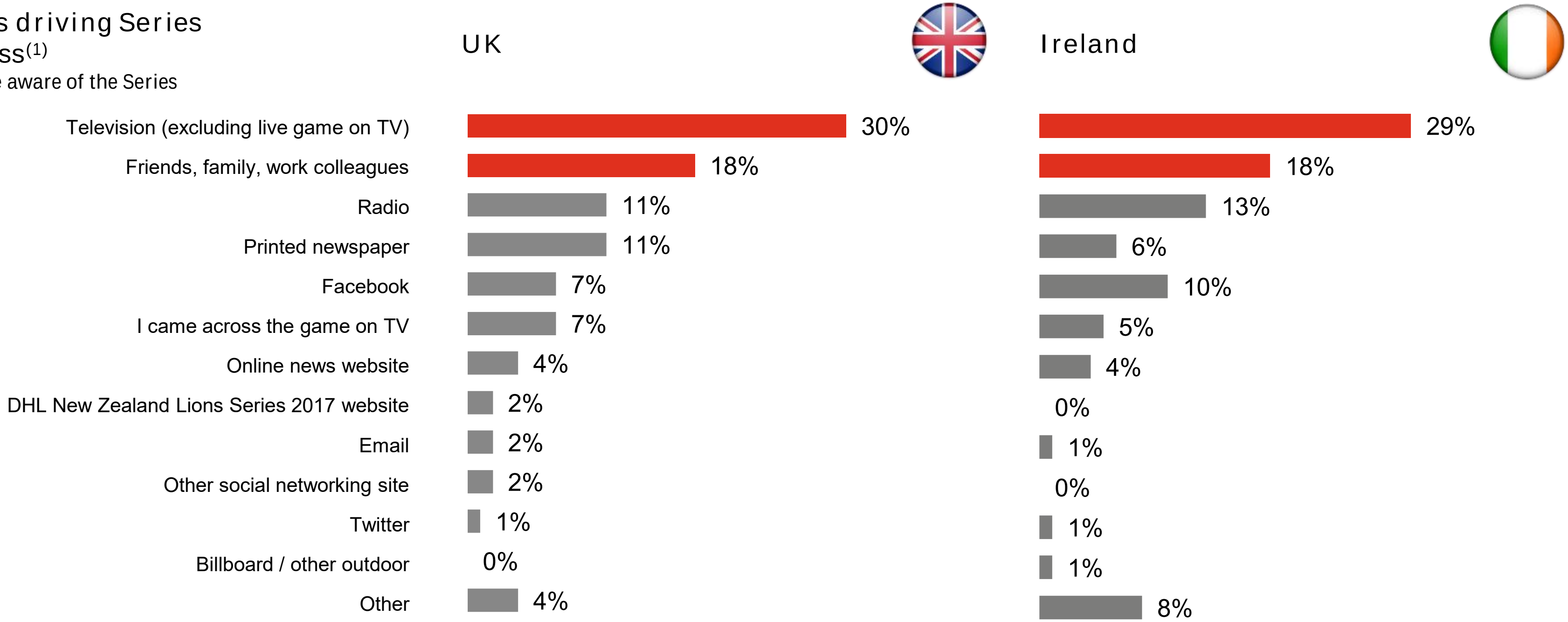
Significantly lower among:

- Females (54%)
- 18-34 years (48%)

Base: UK / Ireland residents aged 18 plus
Sample size: UK, n=814 | Ireland, n=532

Appendix C - Within both the UK and Ireland survey populations, television generated most of the Series awareness followed by word of mouth

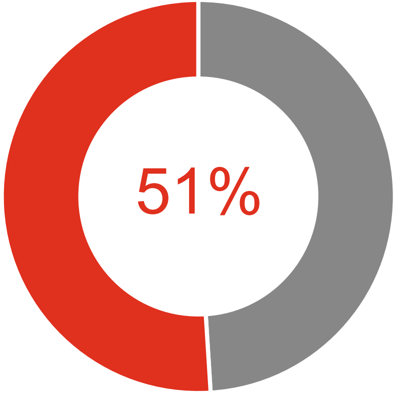
Channels driving Series awareness[(1)]
Among those aware of the Series



Base: UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220 | (1) Significant differences by demographic segment available in the complementary data tables

Appendix C – Of those surveyed, over half of those aware of the Series tuned in to at least one of the matches on TV with Ireland residents more likely to do so than UK

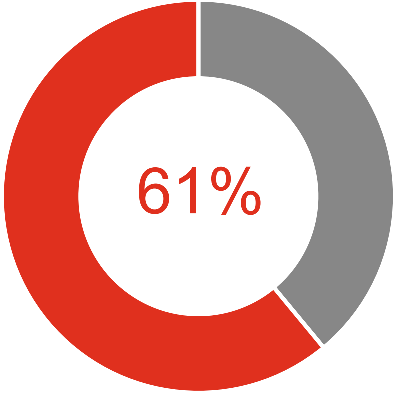
UK – TV viewership of any match
Among those aware of the Series



Significantly higher among:
- 18-34 years (76%)
- Households with children school aged or less (64%)

Significantly lower among:
- 55+ years (37%)
- Households without children (43%)
- HHI[1] up to £20K (36%)

Ireland – TV viewership of any match
Among those aware of the Series



Significantly higher among:
- Males (67%)
- 18-34 years (72%)
- HHI[1] €60K+ (75%)

Significantly lower among:
- Females (52%)
- 55+ years (54%)
- HHI[1] up to €30K (52%)

Base: UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220 | (1) HHI = household income

Appendix C - Unsurprisingly, the highest viewership by those surveyed was for the All Blacks matches

TV viewership of individual matches(1)

Among those aware of the Series

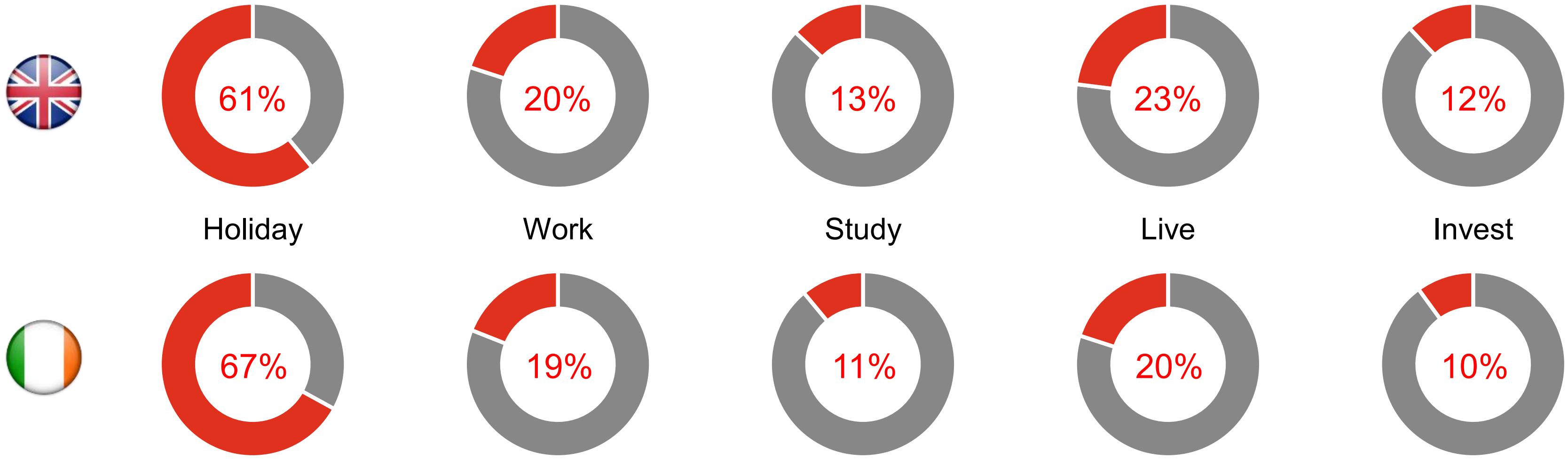
First match ↓ Final match

Any of the games	51%	61%
By individual game		
Whangarei – Provincial Barbarians	14%	21%
Auckland – Blues	12%	15%
Christchurch – Crusaders	11%	24%
Dunedin – Highlanders	13%	14%
Rotorua – Maori All Blacks	15%	22%
Hamilton – Chiefs	8%	12%
Auckland – All Blacks	26%	41%
Wellington – Hurricanes	7%	15%
Wellington – All Blacks	30%	44%
Auckland – All Blacks	38%	50%
Any of the three Auckland games	49%	57%
Either of the two Wellington games	30%	45%
Average number of games tuned in to	1.7	2.6

Base: UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220 | (1) Significant differences by demographic segment available in the complementary data tables

Appendix C - As a result, surveyed UK and Ireland residents are more likely to consider New Zealand as a destination – most likely for a holiday but also with good levels of stated interest to live and work in New Zealand

As a result of what you have seen and heard about the recent DHL New Zealand Lions Series 2017 rugby tour, are you more **likely to consider New Zealand as a place to…?**(1)



Base: UK / Ireland residents aged 18 plus and aware of the Series
Sample size: UK, n=199 | Ireland, n=220 | (1) Significant differences by demographic segment available in the complementary data tables