

Economic impact of the Australian War Memorial

Expenditure by Australian War Memorial visitors in Canberra 2009-2010

Methodology

The methodology used in this analysis is based on an approach used by the Centre for Tourism Research in determining the economic impact of the National Gallery of Australia's *Monet and Japan* exhibition.

It uses the results of the Australian War Memorial's ongoing visitor exit survey which was conducted over 20 days during 2009-2010. In all, 2,313 visitors were randomly approached and asked to fill in a self-completion survey at the end of their visit to the Memorial; of these people, 1,343 actually completed the survey. This provides a response rate of 58%.

This sample size has a confidence interval of up to plus or minus 2.7% at the 95% confidence level.

In the survey, respondents were asked a range of questions including:

- Where they lived
- The main purpose of their visit to Canberra (non-locals)
- How many nights they would be staying in the Canberra region
- How many adults and children were part of their immediate group visiting the Memorial

Survey respondents were not directly asked about their expenditure during their trip to Canberra. Instead, data has been drawn from the Tourism Research Australia online publications *Regional expenditure 2008 – Domestic overnight visitors* and *Regional expenditure 2008 – Domestic day visitors*. These publications report average expenditure of \$158 by day-trippers to the ACT in 2008 (the most recent figures), and of \$156 per day by overnight visitors (excluding airfares and long distance transport costs). The average length of stay by overnight visitors to Canberra was 3.0 nights. These figures have been used to estimate expenditure by Memorial visitors in Canberra.

Number of visitors to the Memorial

The Australian War Memorial attracted 868,828 visitors during 2009-2010. Of these, approximately 74% were adults and 26% were children (including children booked as part of an educational visit). In the economic model that is used for this analysis, children are valued as .5 of an adult. This means that the Memorial had approximately 638,705 adult visitors and 115,061 'adult equivalents' during 2009-2010. This is demonstrated in Table 1:

Table 1 Adult equivalent visitors to the Memorial in 2009-2010

Number of people who attended the Memorial	868,828
Proportion of visitors that were adults	74%
Number of adults who attended the Memorial	638,705
Proportion of visitors that were children	26%
Number of children who attended the Memorial	230,123
Children represented as 'adult equivalents'	115,061
Total number of 'adult equivalents' who attended the Memorial	753,767

The results of the Memorial's visitor exit survey showed that the majority of the Memorial's visitors were tourists visiting Canberra. In fact, 87.3% of the Memorial's visitors were tourists, while only 12.7% of Memorial visitors were residents of the ACT. This means that approximately 658,050 of the Memorial's adult equivalent visitors in 2009-2010 were also visitors to Canberra.

Of the tourists who completed the Memorial's exit survey, 19.3% came to the ACT specifically to visit the Memorial. This equals approximately 127,003 'adult equivalent' visitors.

It is these visitors that are used to determine the impact of the Memorial on the ACT economy. Table 2 provides a breakdown of these figures:

Table 2 Memorial visitors (tourists) who came to Canberra to visit the Memorial

Number of 'adult equivalents' who attended the Memorial in 2009-2010	753,767
Proportion of these that were tourists to Canberra	87.3%
Number of Memorial visitors that were tourists to Canberra	658,050
Proportion of tourists to Canberra that came specifically to visit the Memorial	19.3%
Number of 'adult equivalent' tourists that came to Canberra to visit the Memorial	127,003

These 127,003 tourists can be further split into two categories – those who came to Canberra for a day-trip only, and those who chose to stay overnight in the ACT region.

A large majority of visitors who came to Canberra especially to visit the Memorial chose to stay overnight (82.3%), while just 17.7% came to the region as part of a day trip. These figures are shown on Table 3:

Table 3 Breakdown of Canberra tourists based on length of stay

	Percentage	Number of tourists
Tourists that came to Canberra to visit the Memorial (adult equivalents)		127,003
Overnight tourists	82.3%	104,505
Day-trippers	17.7%	22,498

Expenditure by overnight tourists

The following table shows the expenditure by tourists who came to Canberra specifically to visit the Australian War Memorial and who stayed in the region overnight.

According to the latest data from Tourism Research Australia, the average length of stay by overnight visitors to Canberra was 3.0 nights. However, the Memorial's survey results showed that overnight visitors to Canberra who came specifically to visit the Memorial had an average stay of 2.5 nights. To reflect this slightly lower length of stay, the expenditure figures provided by Tourism Research Australia have been adjusted accordingly. The workings are shown below:

Table 4 Expenditure by overnight tourists

Number of overnight tourists	104,505
Average daily expenditure by overnight tourists to Canberra (TRA data)	\$156.00
Average length of stay by overnight tourists who came to Canberra to visit the Memorial	2.5 days
Average expenditure by overnight tourists who came to Canberra to visit the Memorial	\$390.00
Total expenditure by overnight tourists who came to Canberra to visit the Memorial	\$40,756,950.00

This shows that overnight tourists who visited Canberra especially to see the Memorial spent more than \$40 million in the ACT during 2009-2010.

Expenditure by day-trippers

As outlined above in Table 3, almost 22,500 day-trippers came to Canberra especially to visit the Australian War Memorial in 2009-10. According to Tourism Research Australia data, day-trippers spent an average of \$158 each whilst in Canberra. Total expenditure by day-trippers visiting Canberra to see the Memorial was more than \$3.5 million, as shown in Table 5:

Table 5 Expenditure by day-trippers who came to Canberra to visit the Memorial

Total number of day-trippers who came to Canberra to visit the Memorial	22,498
Average expenditure by day-trippers (TRA data)	\$158.00
Total expenditure by day-trippers who came to Canberra to visit the Memorial	\$3,554,684.00

Total expenditure

The following table shows the total expenditure by overnight tourists and day-trippers who came to Canberra especially to see the Australian War Memorial during 2009-2010:

Table 6 Total expenditure by tourists who came to Canberra to visit the Memorial

Overnight visitors	\$40,756,950.00
Day-trippers	\$3,554,684.00
Total expenditure	\$44,311,634.00

As shown in Table 6, the total expenditure by these tourists was in excess of \$44 million. This amount signifies direct expenditure in the ACT economy during 2009-2010.

This result clearly demonstrates the enormous and ongoing benefit the Australian War Memorial brings to the ACT economy.

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References

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Tourism Research Australia (2009) *Regional expenditure 2008 – Domestic overnight visitors* published at http://www.ret.gov.au/tourism/Documents/tra/Regional%20Expenditure/12_DomON_State_Territory_v1.pdf and accessed on 26 July 2010