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**Measuring the
Impact of Festivals**

**Guidelines for conducting an
economic impact study**

**Prepared by the National Centre
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MEASURING THE IMPACT OF FESTIVALS

Guidelines for conducting an economic impact study

National Centre for Culture and Recreation Statistics

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Preface

Australia's festivals offer a unique and valuable contribution to our cultural life. Festivals illustrate in a dynamic way the creative spirit of small towns, big cities and remote communities.

They also build bridges between people with different views of the world. Community festivals in regional Australia are on the increase, both in number and in popularity - as a result, regional centres with strong cultural and tourism profiles are enjoying direct economic and social benefits.

There are now some 1300 festivals Australia wide, ranging from major international events such as the Sydney, Melbourne and Adelaide International Festivals to the more regional and community based events. These festivals provide tangible benefits by giving their communities a creative focus, generating pride in the community and a sense of belonging to it, and providing economic benefits by attracting tourists to the area.

Cultural tourism is one of the fastest growing tourism sectors worldwide, and within Australia.

There is a growing recognition of the benefits accruing to regional economies through festival activity. While the types of economic benefits created by a festival can be easily identified, it is often difficult to put a monetary value on them. This paper proves a practical guide for all those involved in the administration of festivals in Australia. It will help you to develop a measure of the economics benefits of your festival to your own community.

The paper is a practical result of the co-operation between state, territory and federal arts agencies through the Statistics Working Group of the Cultural Ministers Council.

Should any Festival organisation wish to obtain a master copy of the questionnaire contained in this paper, please contact Chris Giddings on 08 82377326 at the National Centre for Culture and Recreation Statistics of the Australian Bureau of Statistics.

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MEASURING THE IMPACT OF FESTIVALS

1 INTRODUCTION

This paper has been prepared by the National Centre for Culture and Recreation Statistics at the request of the Statistics Working Group of the Cultural Ministers Council. It has been developed given the interest in better information gathering, with the hope that it will lead to a more consistent approach to economic impact studies of festivals in the future.

2 BACKGROUND

2.1 There are many festivals held in Australia. They have a variety of themes, ranging from music and the arts through to activities such as flower arranging, food and wine feasts and multicultural events. While most festivals are held annually, some are run biennially and a few occur even less frequently. Some last for only one or two days while others run for weeks. While there are obviously a tremendous variety of types of festivals, they all bring benefits to the communities that host them.

2.2 These benefits include giving the community a creative focus, generating pride in the community and a sense of belonging to it, and providing economic benefits by attracting tourists to the area.

2.3 The economic benefits can be quite considerable. For example, an economic impact study of the 1996 Adelaide Festival put the economic benefit to South Australia at \$13 million while a study of the 1993 Sydney Mardi Gras put its benefit to NSW at \$12 million. The economic benefit of a festival can also be expressed in terms of the employment it creates. This paper looks at the types of economic benefits that can accrue to a community by staging a festival and how they might be measured. It also contains some guidelines for conducting economic impact studies and provides suggested questionnaires. It highlights how to best produce meaningful data for an economic impact study which can be used in building a case to justify the benefit of the festival.

2.4 This paper may also help Festival organisers to collect data which enables them to better understand their audiences and so assist them in marketing their festival.

3 WAYS TO COLLECT THE DATA REQUIRED FOR AN ECONOMIC IMPACT STUDY

3.1 While the types of economic benefits created by a festival can be easily identified, it is often difficult to put a money value on them. To get some idea of the size of the economic impact of a festival, the most important information required is the number of tourists who visited the area because of the festival, the average

amount of money they spent while they were there, and how much of the expenditure was retained in the community. (Needless to say, a complete economic impact assessment requires much more information to accurately assess the benefits).

3.2 There are various ways in which these data could be collected. For most festivals, the total attendance would be known (e.g. through bookings or gate receipts). If some people could have attended more than one event at the festival, some adjustment would need to be made to avoid double-counting the same people. Then, by estimating the percentage of attendees who are tourists, it would be possible to estimate the total number of tourists. The number of tourists at a festival is difficult to estimate but it is a critical data item for any economic impact study. Estimates in most cases are based on data collected through administrative systems (e.g. the number of tickets sold), or through surveys of attendees.

3.3 Information on expenditure needs to be obtained direct from the tourists. Interviewers could approach people while they are at the festival to ask them the required questions. Questionnaires could be handed out to the attendees and then mailed back later on (at the end of the festival, the person would have a better idea of how much was spent in the region). If the festival accepted mail bookings for events, a mail-out survey could be conducted.

3.4 It is also very important to determine whether the tourists came to the region because of the festival or whether they were coming anyway (only those who came because of the festival should be included in the economic impact study). This information can also be collected in the questionnaire.

3.5 One of the problems encountered in economic impact studies is determining how much expenditure the respondent incurred at the festival. To some extent, this can be overcome by careful questionnaire design. However, some of the difficulties in determining the amount of expenditure cannot readily be fixed in this way. For example:

- some of the tourists may not have completed their stay at the time of providing the information, and so can't be sure of how much more money will be spent; and
- some tourists may not be able to recall all of the expenditure made while attending the festival.

3.6 Any expenditure generated by the festival also has flow-on effects in the community. For example, a tourist's expenditure on a meal benefits the restaurateur who provides the meal, but it may also indirectly benefit other local businesses (e.g. a bakery) and local producers (e.g. market gardeners). These flow-on effects are often referred to as the indirect impact of the festival. The selection of the appropriate values for the multipliers to determine the indirect effects is somewhat arbitrary. This is because there is usually not sufficient

information known about the local industries to assess how much of their inputs are produced locally and how much are brought in from outside of the region.

3.7 The collection of the foregoing information should be sufficient to roughly gauge the economic impact of a festival in dollar terms. A broad indication of the employment impact can be obtained by dividing this amount by average weekly earnings. For example, full-time adult average earnings in Australia are approximately \$700 per week. Therefore, if the economic impact of the festival is assessed as being \$140,000, this is approximately equivalent to 200 full-time jobs for one week (or four full-time jobs for one year).

3.8 The collection and analysis of data to produce an economic impact study requires a considerable amount of resources. For an economic impact study of a major Australian festival, the costs can be considerable, depending on the methodology adopted, the level of accuracy required and the amount of analysis undertaken.

4 A METHODOLOGY FOR CONDUCTING ECONOMIC IMPACT STUDIES

4.1 This section aims to give broad guidelines for anyone wanting to conduct an economic impact study of a festival. The adoption of these guidelines will hopefully minimise the possibility that the resulting analysis will be flawed.

Firstly, it is advisable to have separate questionnaires for visitors and residents as they are asked different questions - one combined questionnaire would look long and daunting to respondents.

Visitor questionnaire

4.2 As stated earlier in this paper, the most important item in an economic impact analysis is to find out how many visitors came to the festival who wouldn't have visited the area had the festival not been held.

4.3 Unless the festival lasts for only one day, total ticket sales will overstate the total number of visitors to the festival, as visitors may come on different days to see different events. Consequently, a methodology must be devised to overcome the problem of double-counting.

4.4 For most festivals, the most accurate way to collect information on visitor numbers would be through an audience survey. This could be used to determine:

- how many of the people at the festival came from outside of the study area;
- how many of those people were coming to the area anyway; and
- how many of those coming anyway extended their stay because of the festival.

4.5 The questionnaires could be handed out to the festival goers as they entered events at the festival⁽¹⁾.

4.6 Some possible wordings for these questions could be:

(a) To determine where the person lived (in case a resident is accidentally given a visitor questionnaire):

Where do you usually live?

(b) To determine if the person visited the study area solely because of the festival:

Would you have come to [study area] this year had the [festival name] not been held?

The purpose of this question is to determine if all of the person's expenditure in the study area can be attributed to the festival. If the person was coming anyway, only the additional expenditure incurred because of the festival can validly be included in the economic impact study. The reference period (this year) is somewhat arbitrary, but should be long enough to identify those people who have arranged the timing of their trip to coincide with the festival. To avoid the risk that some trips may be excluded from the economic impact study when they shouldn't be, the following question could be asked of people who said that they were coming anyway.

Was your visit to [study area] during the Festival an additional visit especially for the Festival?

To isolate the additional amount of time spent in the study area as a result of the festival (if they were coming anyway):

Did you stay longer in [study area] on this visit because of the Festival?

and, if yes,

How many more nights did you stay?

To determine what proportion extra time was of the total time spent in the study area, it would also be necessary to ask these people:

How many nights did you stay in total?

(c) To determine how many visitors attended multiple events (for weighting⁽²⁾ purposes):

How many [Festival name] performances and events did you attend?

If some events aren't included in the scope of the survey (e.g. exhibitions), this question would need to identify the number of these separately⁽³⁾. The questionnaires returned should be given a weight in the final results which is

inversely proportional to the number of in-scope events attended e.g. a person in the sample attending just one event would contribute twice as much to the final results as a person attending two events⁽⁴⁾.

(d) To determine how much was spent by the visitors in the study area, it is probably least confusing for respondents (and therefore more likely to be accurate) to collect information for their travelling party. This is also useful for ensuring that expenditure on children in the travelling party is included in the analysis. It is helpful to ask for a breakdown of the expenditure incurred as the categories listed can give respondents a reminder of some expenditure that they may have otherwise overlooked. Suggested wording is:

The following question is about your estimated expenditure in [study area] during your entire visit.

*Please include **all spending made by you and all members of your family** (if another member of your family receives a questionnaire, you should still include their expenditure on your questionnaire).*

*Remember to include payments made by **cheque, bankcard and credit cards**.*

On your visit how much did you (and your partner/family) spend in [study area] on:

Accommodation

Meals, food and drinks

Festival tickets

Other entertainment costs (e.g. nightclubs, movies, museums)

Transport (e.g. taxi fares, petrol, car hire)

Personal services (e.g. hairdressing, laundry, medical)

Other expenditure (e.g. films, souvenirs, books, cigarettes)

To determine the amount of expenditure reported that should be included as the respondent's, the analysis requires knowledge of how many people this expenditure covered. Assuming that children are not handed questionnaires, the expenditure should be divided by the number of adults in the travelling party⁽⁵⁾. Suitable wording would be:

How many people does this expenditure cover?

Number of adults

Number of children

4.7 This is all the information that is required from visitors to conduct an economic impact study. However, most surveys also collect some additional information (e.g. age, sex, opinions on the festival) to assist in planning and marketing future festivals. The amount of additional information collected should be kept to a minimum, as a long questionnaire has an adverse effect on the response rate (i.e. the number of questionnaires returned) and so would make the survey results less reliable.

The resident questionnaire

4.8 As indicated previously, it is advisable to have separate questionnaires for visitors and residents as they are asked different questions. If residents form the vast majority of attendees, it is advisable to sample a lower proportion of them to save on processing costs.

4.9 The information required from residents is not anywhere as detailed as for visitors. Only those residents who 'holidayed at home' should be included in the economic impact study.

The following questions would elicit the information required from residents:

Where do you usually live? (to ensure that they are residents and not visitors)

Have you chosen to stay 'at home' this year to attend the festival rather than take a holiday?

Those who stayed at home can then be asked:

In the absence of the festival, where would you have holidayed?

In [study area]

Elsewhere

Those who would have holidayed elsewhere can then be asked:

For how many nights would you have stayed away on holidays?

4.10 The relevant expenditure to include in the study would be the money that would have been spent had the person holidayed outside of the study area. As this expenditure is hypothetical and so would cause most respondents difficulty, it is better to base estimates of their likely expenditure on the daily expenditure of people who have been on holidays (e.g. visitors at the festival).

4.11 The other information that must be asked of residents (for weighting purposes) is how many attended multiple events. This question would be identical to that asked of visitors, viz:

How many [Festival name] performances and events did you attend?

Number of questionnaires that should be distributed

4.12 The accuracy of the survey depends on the response rate (the percentage of questionnaires returned) and the sample size.

4.13 A high response rate reduces the possibility that those who returned the questionnaires have different characteristics from those who don't. Thus, a high response rate means that one can be more confident that the questionnaires returned truly represent the sample initially selected. Typical response rates for mail back audience surveys are between 20% and 50%.

4.14 The larger the sample size, the more accurate the information collected is likely to be. The sample size can be measured in two ways:

- the absolute number of festival goers interviewed; and
- the proportion of the total festival goers interviewed.

4.15 The absolute number of people interviewed is the more important of these two factors. As a consequence, to get the same accuracy, an audience survey for a large festival needs to collect information from only slightly more festival goers than a small festival.

4.16 To be reasonably confident about the results of the impact study, a minimum of about 30 questionnaires need to be obtained from visitors who came to the area because of the festival. The total number of people who need to be approached is much larger than this. For example, if, say, only one-half of the visitors came specifically for the festival, then a minimum of 60 visitor questionnaires need to be returned. If say, only a third of the respondents given a questionnaire hand it back, then a minimum of 180 visitors need to be approached. If visitors comprise, say, one-fifth of all festival goers, then a minimum of 900 people need to be approached (though not all residents need to be given a questionnaire).

4.17 If user requirements also include information for marketing purposes, more details about the visitors are needed, thus requiring a larger sample size.

4.18 The large number of people who need to be approached is one of the reasons why it is expensive to conduct economic impact studies for festivals.

4.19 For festivals where significantly less visitors attend than local residents, costs can be slightly reduced by handing the residents questionnaire to only a sample of residents approached. All visitors approached should receive a visitors questionnaire under this scenario.

Calculation of the number of festival goers

4.20 The total attendance at the festival must be known if the total number of festival goers is to be calculated. The total attendance may be obtained, for example, by examining gate receipts or ticket sales for the various events.

4.21 Once the questionnaires have been returned, it is possible to calculate the number of people who went to the festival. The weight allocated to each respondent in the survey is a function of three factors. The first factor affecting the weights arises if every visitor approached is given a questionnaire but, say, only every third resident approached is given a questionnaire. In this example, an initial weight of one can be arbitrarily allocated to each visitor included in the sample and an initial weight of three to each resident included in the sample (see the first column in the table which shows that four visitor questionnaires and two resident questionnaires are returned).

EXAMPLE OF CALCULATION OF WEIGHTS FOR AN AUDIENCE SURVEY

	<i>Initial weight</i> (column 1)	<i>No. of events attended</i> (column 2)	<i>Combined weight</i> (column 3)	<i>Final weight</i> (column 4)
Visitor	1	1	1.0	20
Visitor	1	2	0.5	10
Visitor	1	5	0.2	4
Visitor	1	10	0.1	2
Resident	3	1	3.0	60
Resident	<u>3</u>	2	1.5	<u>30</u>
	10			126

Note: Six questionnaires are returned (the six rows in the table represent the six questionnaires).

Assume: Every visitor approached is handed a questionnaire but only one in three residents approached are given a questionnaire.

Total attendance (given by ticket sales) is 200.

4.22 The second factor to consider is the probability of being approached to complete a questionnaire - a visitor attending multiple events has a greater chance of being given a questionnaire than a visitor attending just one event and the weights should make allowance for this. For example, a visitor attending one event should be given twice the weight that is given to a visitor attending two events. A weight combining the first two factors can be derived by dividing the initial weight for each person in the sample - as shown in the first column of the table - by the number of events the person attended. The combined weight is shown in the third column in the table.

4.23 The third factor to be taken into account is the proportion of total festival goers surveyed. This factor can be calculated by dividing the total number of attendances (obtained from ticket sales) by the sum of the initial weights (in the example in the table, the attendance based on ticket sales was 200 and the sum of the initial weights was 10, making the third factor 20). The final weight is calculated

by multiplying the combined weight derived in paragraph 4.22 by this third factor (the final weight is shown in column 4). Note that this last adjustment to the weights makes an allowance for any questionnaires distributed that were not returned.

4.24 The final weight allocated to each questionnaire indicates how many festival goers that questionnaire represents. For example, in the table, the questionnaire from the visitor who attended one event is assumed to represent a total of 20 festival goers. These 20 festival goers are deemed to have the same characteristics (age and sex) and expenditure patterns as the person who returned this particular questionnaire.

4.25 The total number of festival goers can be obtained by adding up the final weights for all of the respondents (in the example shown in the table, the number of festival goers is estimated to be 126, of whom 36 were visitors).

Other information required

4.26 Other information that would need to be gathered for a full economic impact study includes:

- payments to performers based outside of the study area;
- expenditure by these performers in the study area;
- expenditure by media from outside of the study area (if not captured in the audience survey); and
- sponsorship and grants originating from outside of the area.

4.27 Other factors that could be considered in the study (although they may be too difficult to measure) are:

Do any residents leave the area because of the Festival (e.g. taking advantage of cheap flights returning empty after bringing visitors into the study area)?

Do any visitors come to the study area after the festival is over as a result of publicity generated by the festival?

Are there any costs borne by the local community as a result of the festival (e.g. traffic congestion, noise)?

Calculating the direct expenditure attributable to the festival

4.28 Using the weighted results, it is then possible to calculate the direct expenditure generated by the festival. It would include:

- all of the expenditure of visitors who came to the study area solely because of the festival;

- a proportion of the expenditure of visitors who were coming to the study area anyway, but who extended their stay because of the festival;
- for those residents who holidayed at home, the estimated expenditure that they would have made on holidays outside of the study area; and
- other expenditure attributable to the festival (e.g. expenditure by performers who normally reside outside of the study area).

4.29 Any payments made for services based outside of the study area need to be subtracted from this direct expenditure (e.g. money paid to performers who normally reside outside of the study area).

Calculating the total economic impact of the festival

4.30 By selecting an appropriate value added multiplier (ideally based on input-output tables for the study area), the total economic impact can be calculated. These value added multipliers are generally in the range of 1.0 to 1.5, which implies that the total economic impact may be up to 50% higher than the direct expenditure attributable to the festival⁽⁶⁾.

(1) The proportion of total questionnaires handed out at a particular event in the festival should be calculated by dividing that event's attendance by the total attendance at all events (these attendances have to be estimated as they will not be known exactly until after the festival).

(2) In statistical methodology, the term 'weight' means the number of festival goers that each returned questionnaire is calculated to represent.

(3) If questionnaires are not handed out at a particular event, it cannot be included in the scope of the survey unless similar events are surveyed and allowance is made in the distribution of questionnaires at the similar event to represent other events.

(4) This is because people who attended only one event are less likely to be handed a questionnaire - by attending only one event, there is only one time they can be approached. Consequently, the weights need to be adjusted if the festival has multiple events to overcome the bias in the sample selected.

(5) By dividing the expenditure by the number of adults in the party, any expenditure incurred by or on children is included on an adult's form and so is reflected in the economic impact study.

(6) Note that the value added multiplier can have a value less than one. This would be most likely to occur where the study area was very small - in this case, there would be a lot of leakages as many of the goods purchased by visitors would have been produced elsewhere. Note that the appropriate multiplier for an economic impact study is the value added multiplier. The input-output publications listed in the references (e.g. Multipliers for Culture-Related Industries) concentrate on describing output multipliers rather than value added multipliers.

Appendix - Sample questionnaires

[FESTIVAL NAME] VISITORS SURVEY

The organising committee of the [Festival name] is conducting this survey to obtain information on the economic importance of the festival.

Information supplied in this survey will be treated confidentially and the results will be presented only in the form of aggregated data.

You may find it easier to complete this questionnaire at the end of your visit to the festival. However, you may wish to complete this questionnaire during your visit. If so, and you are uncertain of the answer to any question, please give what you consider to be your most likely response.

Thank you for your co-operation.

How to complete this questionnaire.

Answer questions by ticking the appropriate box or by writing in the answer.

Please add any comments you feel are necessary to clarify any of your answers.

Do not complete this questionnaire if you are under 15 years of age.

- | | |
|--|---|
| <p>1. Are you:</p> <p>Male? <input type="checkbox"/></p> <p>Female? <input type="checkbox"/></p> | <p>5. How many nights did you stay in [study area]? nights <input type="text"/> <input type="text"/></p> |
| <p>2. What is your age?</p> <p>Under 15 years (<i>no more questions</i>) <input type="checkbox"/></p> <p>15-24 <input type="checkbox"/></p> <p>25-44 <input type="checkbox"/></p> <p>45-64 <input type="checkbox"/></p> <p>65 or more <input type="checkbox"/></p> | <p>6. Would you have come to [study area] this year had the [festival name] not been held?</p> <p>Yes <input type="checkbox"/></p> <p>No (<i>go to question 10</i>) <input type="checkbox"/></p> |
| <p>3. How many [Festival name] performances and events did you attend?</p> <p>number <input type="text"/> <input type="text"/></p> | <p>7. Was your visit to [study area] during the Festival an additional visit especially for the Festival?</p> <p>Yes (<i>go to question 10</i>) <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
| <p>4. Where do you usually live?</p> <p>[Study area] (<i>no more questions</i>) <input type="checkbox"/></p> <p>Elsewhere in Australia <input type="checkbox"/></p> <p>Overseas <input type="checkbox"/></p> | <p>8. Did you stay longer in [study area] on this visit because of the Festival?</p> <p>Yes <input type="checkbox"/></p> <p>No (<i>no more questions</i>) <input type="checkbox"/></p> |
| | <p>9. How many more nights did you stay? nights <input type="text"/> <input type="text"/></p> |

10. This question is about your estimated expenditure in [study area] during your entire visit.

Please include **all spending made by you and all members of your family** (if another member of your family receives a questionnaire, you should still include their expenditure on your questionnaire).

Remember to include payments made by **cheque, bankcard and credit cards**.

On your visit, how much did you (and your partner/family) spend in [study area] on:

Accommodation?	\$ <input type="text"/>
Meals, food and drink?	\$ <input type="text"/>
Festival tickets?	\$ <input type="text"/>
Other entertainment costs (e.g. nightclubs, movies, museums)?	\$ <input type="text"/>
Transport (e.g. taxi fares, petrol, car hire)?	\$ <input type="text"/>
Personal services (e.g. hairdressing, laundry, medical)?	\$ <input type="text"/>
Other expenditure (e.g. films, souvenirs, books, cigarettes)?	\$ <input type="text"/>
Total expenditure	\$ <input type="text"/>

11. How many people does this expenditure cover?

Number of adults	<input type="text"/>
Number of children	<input type="text"/>

If you require any assistance with this questionnaire, please see one of the interviewers who handed it out. Please hand the completed questionnaire back to the interviewer or post it back in the reply paid envelope supplied. Thank you for your assistance.

[FESTIVAL NAME] RESIDENTS SURVEY

The organising committee of the [Festival name] is conducting this survey to obtain information on the economic importance of the festival.

Information supplied in this survey will be treated confidentially and the results will be presented only in the form of aggregated data.

You may find it easier to complete this questionnaire at the end of your visit to the festival. However, you may wish to complete this questionnaire during your visit. If so, and you are uncertain of the answer to any question, please give what you consider to be your most likely response.

Thank you for your co-operation.

How to complete this questionnaire.

Answer questions by ticking the appropriate box or by writing in the answer.

Please add any comments you feel are necessary to clarify any of your answers.

Do not complete this questionnaire if you are under 15 years of age.

- | | |
|--|--|
| <p>1. Are you:</p> <p>Male? <input type="checkbox"/></p> <p>Female? <input type="checkbox"/></p> | <p>4. Have you chosen to stay at home this year to attend the [Festival name] rather than take a holiday elsewhere?</p> <p>Yes <input type="checkbox"/></p> <p>No (<i>go to question 7</i>) <input type="checkbox"/></p> |
| <p>2. What is your age?</p> <p>Under 15 years (<i>no more questions</i>) <input type="checkbox"/></p> <p>15-24 <input type="checkbox"/></p> <p>25-44 <input type="checkbox"/></p> <p>45-64 <input type="checkbox"/></p> <p>65 or more <input type="checkbox"/></p> | <p>5. In the absence of the Festival, where would you have holidayed?</p> <p>[Study area] (<i>go to question 7</i>) <input type="checkbox"/></p> <p>Elsewhere in Australia <input type="checkbox"/></p> <p>Overseas <input type="checkbox"/></p> |
| <p>3. Where do you usually live?</p> <p>[Study area] <input type="checkbox"/></p> <p>Elsewhere in Australia (<i>no more questions</i>) <input type="checkbox"/></p> <p>Overseas (<i>no more questions</i>) <input type="checkbox"/></p> | <p>6. For how many nights would you have stayed away on holidays? nights <input type="text"/> <input type="text"/></p> <p>7. How many [Festival name] performances and events did you attend? number <input type="text"/> <input type="text"/></p> |

If you require any assistance with this questionnaire, please see one of the interviewers who handed it out. Please hand the completed questionnaire back to the interviewer or post it back in the reply paid envelope supplied. Thank you for your assistance.

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