

**Deloitte.**



**SYDNEY  
WORLDPRIDE  
2023**



The economic and social impact  
of Sydney WorldPride 2023

June 2023

**Deloitte  
Access Economics**

## Acknowledgement of country

We acknowledge the Australian Aboriginal and Torres Strait Islander peoples of this nation.

We acknowledge the traditional custodians of the lands on which our company is located, and where we conduct our business.

We acknowledge that Sydney WorldPride's official events took place on the unceded lands of the Gadigal people of the Eora Nation, and the Awabakal and Worimi peoples.

We pay respect to Ancestors and Elders past and present, and recognise their continuous connection to the land and community of the oldest surviving culture on the planet.

Deloitte is committed to honouring Australian Aboriginal and Torres Strait Islander peoples' unique cultural and spiritual relationships to the land, waters and seas and their rich contribution to society.

Walking together with Australia's First Nations People is Deloitte's Reconciliation Action Plan (RAP) which can be found at <https://www2.deloitte.com/au/en/pages/about-deloitte/articles/deloitte-reconciliation-action-plan.html>

This artwork was created by the Sydney WorldPride artist Jessica Johnson who was selected to design the hero artwork, logo and art identity for Sydney WorldPride.





## Acknowledgements

This report draws on consultations with event organisers and leaders within Sydney WorldPride and Equality Australia.

The report was produced by Deloitte Access Economics with the support of the Sydney Gay and Lesbian Mardi Gras and Sydney WorldPride teams.

Significant support was provided by Cameron Brown from Sydney WorldPride in the development of the report and the report's authors include Adele Labine-Romain, Emily Mahler, Evie Fox Koob, Rachel Power and Katie McGregor at Deloitte Access Economics.





# Sydney WorldPride opened Australia to the world, in a first for the Asia Pacific pride movement


Sydney WorldPride **gathered** LGBTQIA+ people from across the globe to honour and empower each other and local communities, to **amplify** and acknowledge connection across all societies, and to **dream** of a future where there is space for all voices.

**309,200** **Unique spectators** across the Sydney WorldPride calendar, representing 1 million in total attendance.

**103,800** **Visitors to Sydney**, including intrastate, interstate and international attendees and artists.

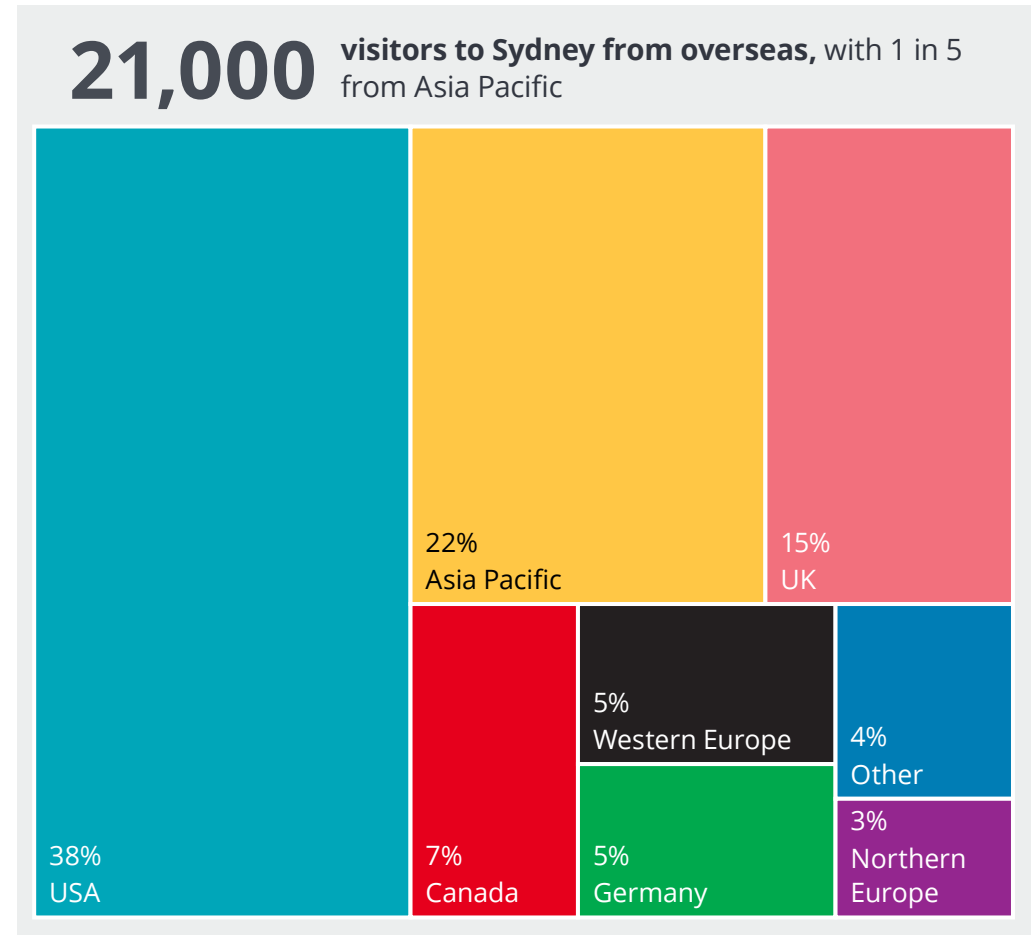
**7,100** **Artists and performers**, from a televised concert to community events and a drag show in Parliament House.

**3,450** **Volunteers**, contributing 15.4 hours each on average across the festival, from the Sydney Mardi Gras parade to the Human Rights Conference.

 **83%** Of **survey respondents** identified as LGBTQIA+

Source: Deloitte Access Economics, Sydney WorldPride attendance data. Attendee survey  
Notes: The above figures capture attendance and participation across all Sydney WorldPride events, including official events, WorldPride Arts, WorldPride Sports, and Pride Amplified events.

Chart i: Country of origin



Source: Deloitte Access Economics. Attendee survey



# The event made a substantial contribution to revitalising the Sydney economy



Source: Deloitte Access Economics, Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras operational and attendance data.  
Notes: FTE jobs refers to Full-Time Equivalent jobs.

# Sydney WorldPride generated broader social value for attendees and community

The festival achieved six key goals:

To **gather** a diverse set of attendees in Sydney



To increase the sense of **belonging, safety and pride** among the LGBTQIA+ community

92% of LGBTQIA+ people said they felt safe and welcome at Sydney WorldPride



Showcase Sydney as a safe and **welcoming city to LGBTQIA+** visitors and residents

92% of attendees said that WorldPride enhanced Sydney's reputation as an inclusive and diverse city

**Dream** of a better future and work together to make the dream a reality



Advocate for the rights and freedoms of LGBTQIA+ people in **Asia Pacific**

81% of Human Rights Conference attendees said they better understand issues facing LGBTQIA+ people in Asia Pacific



Mobilise and welcome a **network of active allies** and strengthen **global connections**

9 in 10 attendees said WorldPride enhanced Sydney's reputation as an arts, entertainment and events capital

**Amplify** a diverse set of voices and experiences



Celebrate **intersectionality** and highlight diversity within the LGBTQIA+ community

77% of attendees agreed that Sydney WorldPride promotes and encourages diversity among artists and entertainers



Enable a commercial return for participating partners

7 in 10 of businesses agreed that WorldPride brought more visitors to the area and was beneficial for business





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# Scope and purpose of this report



Deloitte Access Economics was engaged by Sydney WorldPride to produce a report demonstrating the economic and social impact of Sydney WorldPride.

**Sydney WorldPride was a national first, a landmark event and a critical support for Australia's post-pandemic recovery and the LGBTQIA+ pride movement.**

The Sydney Gay and Lesbian Mardi Gras (the Sydney Mardi Gras) is one of the oldest Pride festivals in the world, and the largest Pride event in Asia Pacific. Sydney WorldPride (the Festival) marked the 45th anniversary since the founding of the Sydney Mardi Gras, and the 50th anniversary of the first Gay Pride Week in Australia.

For 20 years, WorldPride has been hosted in and amongst local Pride Festivals around the globe, in destinations such as Rome, Jerusalem, London, Toronto, Madrid, New York and Copenhagen. The selection of Sydney to host WorldPride 2023 ensured that for the first time Pride represented and engaged with the LGBTQIA+ community in the Asia Pacific.

Sydney WorldPride ran from February to March 2023, hosting well-loved Sydney Mardi Gras events including the Sydney Mardi Gras Parade and Fair Day, as well as hundreds of additional events to celebrate WorldPride.

**Sydney WorldPride gathered LGBTQIA+ people from across the globe to honour and empower each other and local communities, to amplify and acknowledge connection across all societies, and to dream of a future where there is space for all voices.**

The purpose of this report is to articulate the economic and social contribution of Sydney WorldPride. Specifically, this report seeks to:

- communicate the impact Sydney WorldPride had in its calling to Gather, Dream, and Amplify
- Illustrate the ongoing importance and value of Sydney Mardi Gras
- contribute to calls for greater action and investment to improve the lives of the LGBTQIA+ community in Australia, the Asia Pacific and around the world.
- demonstrate the importance of holding significant events in Sydney to tourism brand, community, and local businesses.

**The intended legacy of Sydney WorldPride was to take the global Pride movement forward, by delivering a world-class event that represented and supported a diverse set of stakeholders.**

This report outlines the social benefits and ongoing legacy of the Festival, including the concerted efforts made to highlight Asia Pacific communities and advocate for their rights, design and deliver a program with First Nations people at the centre, and to reopen Sydney to the world in one of the first major events post-pandemic.

## Data sources for the analysis

The analysis in this report is informed by a range of sources including:

- Sydney WorldPride Limited and Sydney Gay and Lesbian Mardi Gras. The peak organisations responsible for planning and hosting the Festival provided data covering their independent financial and operational performance, and total participation data detailing attendance figures, and volunteer, employee and artist counts.
- An attendee survey of spectators, artists, and volunteers. The survey was developed, scripted and hosted by Destination NSW in consultation with Deloitte, Sydney WorldPride, and Sydney Gay and Lesbian Mardi Gras. Further details on the survey approach and sample are provided in Appendix 1.
- Supplementary online surveys of (1) Pride Amplified event organisers, (2) local businesses, and (3) Human Rights Conference attendees. The surveys were developed, scripted and hosted by Deloitte in consultation with Sydney WorldPride.
- Publicly available research and data sources as detailed in the report references.

This report presents aggregated data only and does not report individual responses or personal or business sensitive information. The approach to the analysis, including how the analysis drew on these various sources, is detailed in Appendix 2.



# The history of Sydney Gay and Lesbian Mardi Gras

Sydney WorldPride 2023 continued the 45 year history of an iconic protest, parade and party.

The Sydney Mardi Gras began in 1978 when a small group of protesters converged on Oxford Street to march and commemorate the Stonewall riots<sup>1</sup>.

Unfortunately, the protest attracted police violence and arrests and in the following months, more protests and arrests were observed. The Sydney Morning Herald published the personal details and occupations of those who attended the Mardi Gras Parade (the Parade), and many attendees were fired, given that homosexuality was a criminal offence until 1984.

In 1979, the NSW Summary Offences Act legislation which allowed the arrests to be made was repealed by the Parliament of New South Wales. This means that the backlash of the arrests at the event lead to a major civil rights accomplishment within the LGBTQIA+ community.

That same year, the second Parade saw 3,000 attendees participate in the peaceful protest. The theme was *Power in the Darkness*, and while there was still a significant police presence at the Parade, no arrests were made.

In 1980, the Parade afterparty was introduced and from the mid-80s onwards attendance began to dramatically increase.

By 1989 there were approximately 200,000 attendances<sup>(a)</sup> at the various events associated with the Sydney Mardi Gras. By 1993, attendances had grown to 500,000. By this time, the Sydney Mardi Gras began attracting a considerable number of interstate and international attendees.

From the late 90s onwards, the Sydney Mardi Gras continued to grow in both visitor and local spectator numbers, and in terms of an increasing range and quality of events.

By 2011, the annual Parade was reportedly generating an estimated \$30 million for the New South Wales economy, the second-largest annual event in the state in terms of economic impact.<sup>2</sup>

Robyn Kennedy (she/her), a Sydney Mardi Gras '78er who has fought for LGBTQIA+ rights since the 1970s, reflected on her experiences in the 1978 Sydney Mardi Gras in a 2022 interview with Vogue, reiterating the importance of community solidarity and remaining vigilant in the fight for LGBTQIA+ rights.<sup>3</sup>

Notes: (a) Importantly, one attendee can go to multiple events. Therefore, 'attendances' should not be interpreted as unique attendees.

.....  
“... the thing I remember most about all of that was how we really came together as a community. That whole night, and the following month of protesting united us as a movement. Because of what happened that night, we had a Mardi Gras the following year, and then forever after.”

– Robyn Kennedy, 1978er, Comments to Vogue Australia



Image credit: Daniel Boud



# The history of Sydney Gay and Lesbian Mardi Gras

Sydney Mardi Gras as we now know it includes an array of events to celebrate the diversity of the LGBTQIA+ community.

**The Sydney Mardi Gras now features a host of events including the Parade, Post-Parade Party, Festival, Fair Day, and Sydney Mardi Gras Awards.**

The Parade is a well-known, well-loved, and well-attended feature of the Sydney Mardi Gras. Each year the parade includes over 12,000 entrants, culminating in bright and colourful costumes and intricate floats of groups who represent either a topical theme, community group, or political message.

The parade begins with a smoking ceremony and acknowledgement of the Gadigal, who are the traditional owners of the land on which the celebrations are held. 200 motorcycles descend as the *Dykes on Bikes* chart a 1.7 kilometre route through the Sydney CBD and in Darlinghurst, which attracted approximately 400,000 street spectators in 2020 (with attendance at 2021-22 events being impacted by COVID-19).<sup>1</sup>

**The theme and programming of the Sydney Mardi Gras responds to the community and topical stories of the time.**

Often, the Sydney Mardi Gras selects a theme which reflects key issues within the LGBTQIA+ community. In 1985, the parade had significant pressure to cancel due to public fear about the HIV/AIDS epidemic. However, the parade still went ahead with the theme *Fighting for Our Lives*.<sup>2</sup>

In 2017, the year of the Equal Marriage Postal Survey, the theme *Creating Equality* saw floats centred around the campaign, and the 2018 parade included a live wedding atop a float in celebration.<sup>3</sup>

In 2021-2022, the Parade moved to the Sydney Cricket Ground and continued through the lockdowns, a powerful symbol of visibility and pride under difficult circumstances.

The Sydney Mardi Gras Parade was the only Pride event in the world to keep marching under pandemic restrictions.

Following the disruptions of the COVID-19 pandemic, Sydney WorldPride marked the return of The Parade to the Oxford Street precinct, welcomed by record numbers of spectators.<sup>4</sup>



Image credit: Daniel Boud



# The first WorldPride in the Southern Hemisphere

WorldPride celebrates and advocates for the LGBTQIA+ community across the globe through a range of parades, festivals and other cultural activities.

WorldPride is an international event that celebrates and promotes the rights of LGBTQIA+ individuals.

The first WorldPride was held in Rome in 2000. Organisers posit that the event attracted approximately 250,000 people in a march to the Colosseum and the Circus Maximus, two world-renowned ancient sites in the city. They reported that this was one of the largest public gatherings in the city for decades. Alongside the Parade, the Festival included a range of activities and celebrations such as a fashion show, conferences, and leather dance.<sup>1</sup>

Each instalment of WorldPride has been held at a different location, representing an opportunity to highlight the diverse global LGBTQIA+ community.

Licensed by the international organisation InterPride and hosted by a country-specific member organisation, WorldPride presents an opportunity for potential host cities to bid to host upcoming WorldPride instalments.

The previous and upcoming WorldPride celebrations are presented below (Figure 1).

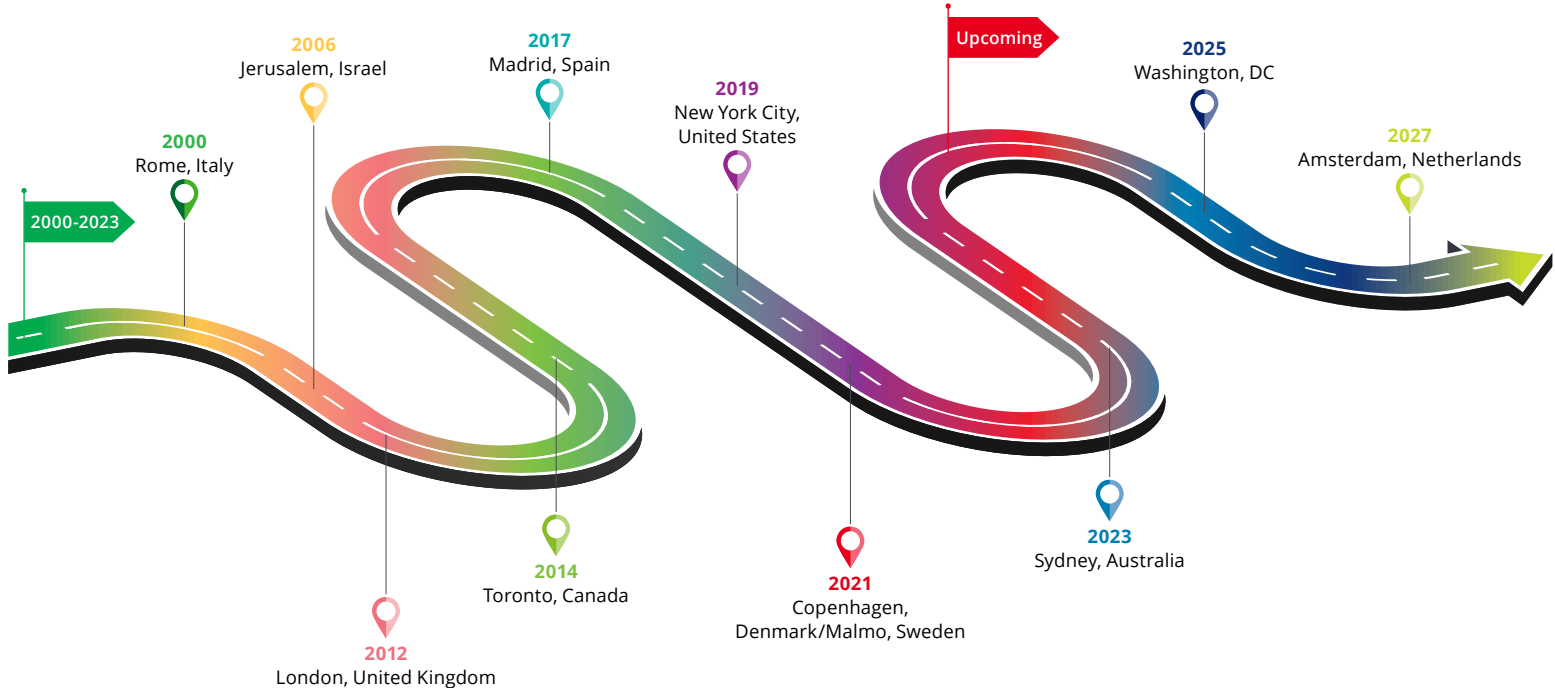
In 2021 and for the first time in its history, WorldPride was held in two locations, Copenhagen (Denmark) and Malmo (Sweden).

It coincided with the EuroGames and other activities held in the area. The event was held on two key LGBTQIA+ anniversaries in Denmark: 70 years after the world's first successful genital reconstructive surgery (1951) and 50 years after Denmark's chapter of the Gay Liberation Front was founded (1971).<sup>2</sup>

Sydney is the 9th city to win hosting rights and the first in the Southern Hemisphere.

A central feature of Sydney Gay and Lesbian Mardi Gras' bid was to celebrate and support LGBTQIA+ communities across the Asia Pacific region.

Figure 1: International host cities of WorldPride events



Source: Deloitte Access Economics

# An opportunity for allyship and advocacy across Asia Pacific

Sydney WorldPride presented an opportunity to strengthen Australia's position as an ally to the Asia Pacific LGBTQIA+ community.

**The bid for Sydney WorldPride responded to a challenging regional context for LGBTQIA+ rights, and presented an opportunity for advocacy.**

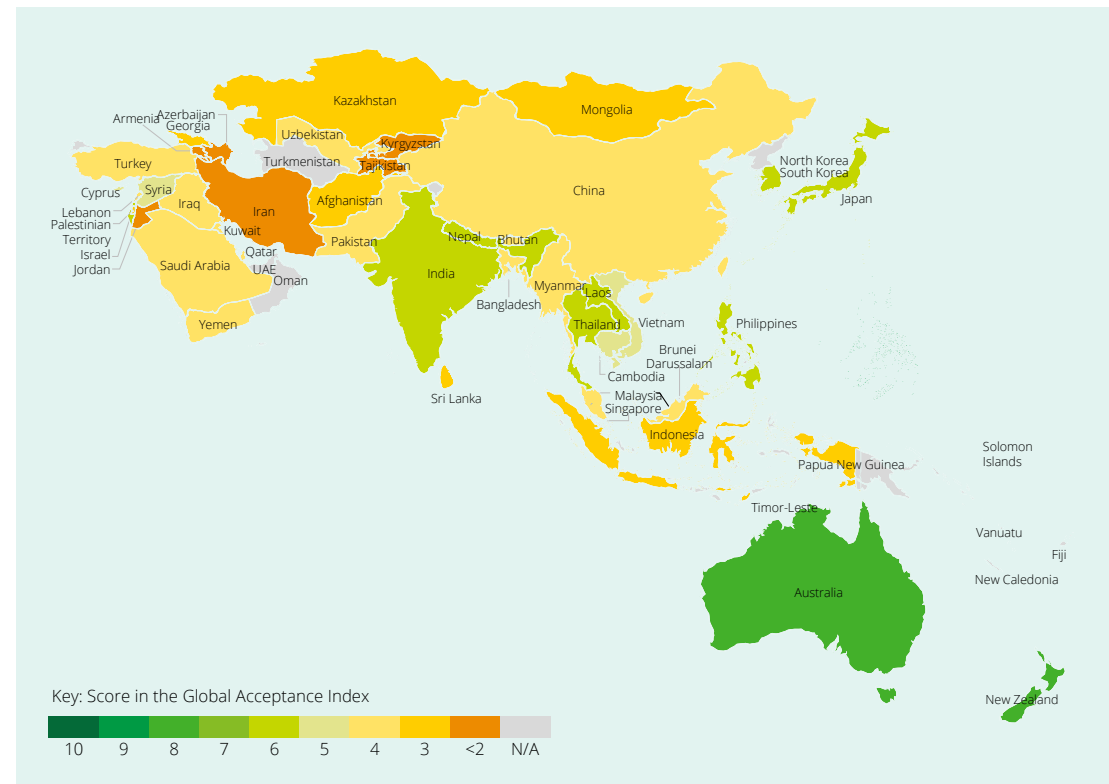
The bid made reference to recent injustices against LGBTQIA+ people including a public caning to a young couple in the Aceh Province of Indonesia in 2017 who were committed for the 'crime' of engaging in gay sex<sup>1</sup>, and an attempt in 2019 in the Sultanate of Brunei to make the already criminal offence of sex between men one that is punishable by death by stoning<sup>2</sup>. For a list of countries where being LGBTQIA+ is punishable by law, see page 13.

**Sydney WorldPride provided the opportunity to signify Australia's position as a safe gathering place and ally to the LGBTQIA+ community in Asia Pacific.**

In a global index measuring Social Acceptance of 'LGBTI' People published by the UCLA Williams Centre, Australia ranks 11th out of 175 countries, and 2nd in Asia Pacific, after New Zealand.<sup>3</sup> Other major Asia Pacific countries, including India and China, rank far lower, at 51 and 100 respectively.

The Sydney WorldPride Festival's landmark Human Rights Conference featured regional spotlights on progress and challenges across Asia Pacific to strengthen global connections and advocacy efforts.<sup>4</sup>

**Figure 2:** Social Acceptance ratings of LGBTI people in Asia Pacific



Note: this figure uses the acronym 'LGBTI' to align to the groups included in the academic research  
Projections: GCS China Geodetic Coordinate System 2000, GCS WGS 1984



# There are 66 countries where being LGBTQIA+ is punishable by law

The Amsterdam Rainbow Dress, a powerful symbol of ongoing fight for LGBTQIA+ rights worldwide, arrived in Australia for the first time ahead of Sydney World Pride 2023 and the Human Rights Conference.<sup>1</sup>

Designed by Arnout van Krimpen (he/him) in 2016, the dress was constructed using the 71 flags of countries where being LGBTQIA+ was punishable by law at the time<sup>2</sup>. It stands at over three metres tall and has a diameter of 16 metres. When a country progresses towards LGBTQIA+ equity, their flag is replaced with a rainbow flag. According to van Krimpen, until all flags are replaced, “we will continue to inform people and call on policymakers to fight for LGBTQIA+ human rights and call on civil societies to fight against injustice, discrimination and violence.”



“We will continue to inform people and call on policymakers to fight for LGBTQIA+ human rights and call on civil societies to fight against injustice, discrimination and violence.”

Most recently, the flags of the Cook Islands and Barbados were replaced with rainbow, as these countries passed legislation to decriminalise consensual LGBTQIA+ adult relationships. There remain 66 countries, including several in Asia Pacific, where these relationships remain illegal.

## Countries where being LGBTQIA+ is punishable by law<sup>3</sup>

- Uganda
- Qatar
- Mauritius
- Comoros
- Ghana
- Turkmenistan
- Cameroon
- Palestine
- Namibia
- Egypt
- Afghanistan
- Morocco
- Dominica
- Senegal
- Malawi
- Samoa
- Kenya
- Malaysia
- Uzbekistan
- Ethiopia
- Papua New Guinea
- Sudan
- United Arab Emirates
- Maldives
- Swaziland
- Brunei
- Zimbabwe
- Tanzania
- Togo
- Tunisia
- Myanmar
- Kuwait
- Iraq
- Bangladesh
- Guyana
- Guinea
- Yemen
- Jamaica
- Grenada
- Tonga
- Saudi Arabia
- Oman
- Iran
- Kiribati
- Tuvalu
- Lebanon
- Nigeria
- Indonesia
- Pakistan
- Gambia
- Algeria
- Burundi
- Solomon Islands
- Sierra Leone
- Mauritania
- Saint Lucia
- Syria
- Libya
- Liberia
- Chad
- South Sudan
- Zambia
- Somalia
- Sri Lanka

Source: Human Dignity Trust

# Amsterdam Dress in Sydney

Image credit: Cassandra Hannagan





# The goals of Sydney WorldPride



The vision of Sydney WorldPride was for a world-class festival of LGBTQIA+ arts and culture that was inclusive, diverse, and accessible, built through committed partnerships.

To bring this vision to life, Sydney WorldPride developed 8 key goals and a theme which reflected on the strengths of the international LGBTQIA+ community.

The goals of Sydney WorldPride 2023 (see right) provided a set of guiding principles to inform the programming and delivery.

The festival theme: *Gather, Dream, Amplify* spoke to the purpose and intended legacy of the festival.

The theme of Sydney WorldPride was developed following widespread consultation with the national LGBTQIA+ community across the planning stage.

*Gather, Dream, Amplify* reflected the festival's intentions to celebrate with an international community, and to consider the next frontier of inclusion, and Australia's role in supporting these goals across Asia Pacific.

The theme also presented a framework to understand the social benefits of Sydney WorldPride and is used as the organising structure in the social impact component of this report.

## The Goals of Sydney WorldPride 2023

- 1. Ensure that the Festival embraces First Nations perspectives and culture.** Australia is home to the oldest continuous culture in the world. As such, our Aboriginal and Torres Strait Islander LGBTQIA+ communities bring their own distinct voices and stories to share. Their contribution and voice was made an integral part of the event calendar of Sydney WorldPride 2023.
- 2. Showcase the breadth of Australian LGBTQIA+ arts and culture to regional, national and international visitors.** The Festival will truly showcase the high calibre of LGBTQIA+ visionary artists from Australia across multiple art-forms.
- 3. Ensure that the Festival is accessible.** Our events will be created with a strong focus on accessibility ensuring that people living with disability are considered at all stages of event development. Removing barriers to access across the Festival will be front and centre in our planning.
- 4. Develop sustainable and mutually beneficial partnerships.** Our partnerships will be built on a foundation of genuine engagement and collaboration. We highly value our stakeholders, artists, audiences, visitors and event producers and we demonstrate this through care and respect.
- 5. Ensure that our communities and audiences feel safe, welcome and represented.** Our events will be developed with empathy and consideration of the audience experience.
- 6. Ensure a multiplicity of voices across the Festival and through the curation of the Festival program.** Our processes in the development of the Festival will be equitable and open and embrace multiple perspectives.
- 7. Deliver a financially viable program.** The Festival Program will be developed with financial responsibility, thorough planning and appropriate resourcing.
- 8. Develop a Festival that is environmentally responsible.** We will commit to reducing carbon emissions from operations and events with the aim of preserving a healthy natural environment for future generations.<sup>1</sup>



# The key events of Sydney WorldPride

The Festival program explicitly considered the distinct experiences of eight intersectional groups.

Alongside official events, the program was co-designed with community organisations and local businesses.

Dedicated Sports and Arts programming and a partnership program 'Pride Amplified' were developed to ensure that a diversity of LGBTQIA+ community members and experiences were represented in the programming (Figure 3).

Eight curatorial priorities were identified to inform programming, with the intent that events were representative of intersectional identities held by those attending the festival.

Sydney WorldPride prioritised the development of events that provided a platform and opportunity for voices that have traditionally been under-represented whilst developing new audiences for LGBTQIA+ arts and cultural events.

These groups included:

- First Nations Peoples
- People from Asia Pacific
- People of Colour
- Transgender + Gender Diverse People
- People with Disability
- Women
- Elders
- Youth

Several of the Festival's landmark events, including the Human Rights Conference, First Nations Gala, First Nations Gathering Space and Ultra Violet party were designed with these priority groups in mind. These communities were all also represented in various floats in the Parade and within central events, such as the Opening Concert line-up.

Figure 3: Attendances by event type

Official Events	WorldPride Arts	WorldPride Sports	Pride Amplified
<b>Events</b>			
<b>38</b>	<b>82</b>	<b>17</b>	<b>334</b>
<b>Key examples</b>			
These events were delivered with Sydney Gay and Lesbian Mardi Gras, including: <ul style="list-style-type: none"> <li>• Flag Raising Ceremony</li> <li>• Fair Day</li> <li>• Sydney Harbour Bridge Pride March</li> <li>• The Parade</li> <li>• Human Rights Conference</li> <li>• Marri Madung Butbut, the First Nations Gathering Space.</li> </ul>	These events were delivered in partnership with local industry and community organisations. The event program included Rainbow Elders, a First Nations photo exhibition, and Hubris & Humiliation, an LGBTQIA+ take on the Austen classic, Pride and Prejudice.	These events were delivered in partnership with local industry and community organisations. The program included events such as Pride on Ice, a mixed gender ice hockey tournament, the Tony Galluzzo Wrestling Tournament, and the Frontrunners' international Pride run.	Pride Amplified provided an opportunity for businesses and organisations to independently deliver events under the Sydney WorldPride banner. Such events included a Rainbow Pride Golf Event and Pride Amplified Storytime, a family friendly storytelling event.
<b>Attendances</b>			
<b>751,435</b>	<b>124,136</b>	<b>6,698</b>	<b>194,914</b>
<b>Volunteers (unique)</b>			
<b>748</b>	<b>2,421</b>	<b>281</b>	
<b>Artists (unique)</b>			
<b>3,006</b>	<b>1,382</b>	<b>2,686</b>	

Source: Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras attendance data. There was no available data on the number of unique artists and volunteers for Pride Amplified.



# Live & Proud Opening Concert

Image credit: Anna Kucera





# Attendees of Sydney WorldPride



Sydney WorldPride provided a platform to showcase the voices and cultures of groups that have traditionally been under-represented on a world stage.

Sydney WorldPride drew a wide array of attendees, across a diverse range of genders, sexualities, races, backgrounds and abilities.

For example, 1 in 5 attendees (22%) came from Asia Pacific and 6% identified as transgender and/or gender diverse. The large number of LGBTQIA+ people in the sample (84%) likely reflects a combination of the nature of the Festival and that the survey was perceived as a safe place to disclose LGBTQIA+ status and share their experience.

Through the attendee survey, each of the eight intersectional groups revealed their own unique perspectives and experiences of the Festival.

Overall, most people in each of the eight intersectional groups felt welcome at Sydney WorldPride. However, people with a disability (86%) and transgender people (90%) were less likely than the average attendee to feel welcome, suggesting more can be done to support these groups.

Transgender and gender diverse people (61%) were also less likely than the average attendee (70%) to say that WorldPride increased the level of acceptance for LGBTQIA+ people in Sydney, demonstrating the unique perspective of this particular group.

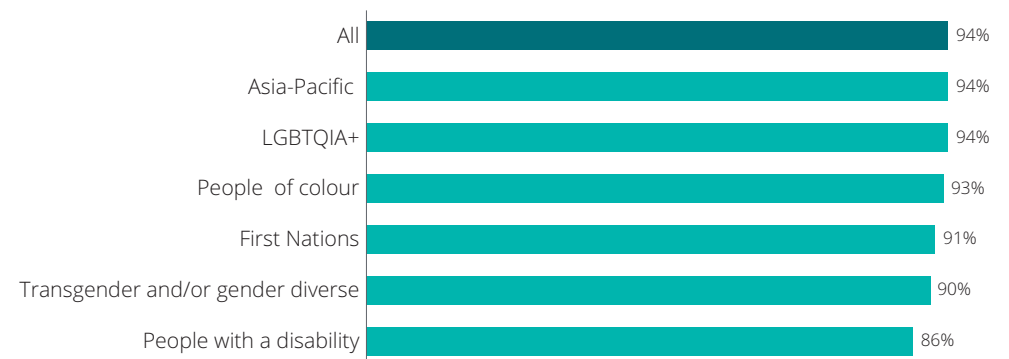
<b>84%</b> Of attendees surveyed identified as LGBTQIA+	<b>22%</b> Of attendees came from Asia Pacific	<b>16%</b> Of attendees identified as a Person of Colour
<b>8%</b> Of attendees identified as a person living with a disability	<b>6%</b> Of attendees identified as transgender and/or gender diverse (GD)	<b>4%</b> Of attendees identified as First Nations

**Chart 1:** Sydney WorldPride has increased the level of acceptance for LGBTQIA+ people in Sydney



Source: Attendee survey based on question, *To what extent do you agree with the following statements on the impact of Sydney WorldPride?* All (n=2,838), Asia Pacific (n=48), LGBTQIA+ (n=2,438), First Nations (n=99), Transgender/GD (n=161)

**Chart 2:** I felt welcome at Sydney WorldPride



Source: Attendee survey based on question, *Please indicate how much you agree with the following statements? I felt welcome at Sydney WorldPride* All (n=5,713), Asia Pacific (n=94), LGBTQIA+ (n=4,896), First Nations (n=194), Transgender/GD (n=315)



# An opportunity to amplify Pride

Landmark events in the Sydney WorldPride program included the first LGBTQIA+ Human Rights Conference, a suite of events featuring the voices of First Nations people, and the festival's first headline event for women.

## Sydney WorldPride showcased First Nations identity as part of presenting Australia on the world stage.

First Nations Australians are the oldest, continuous living culture in the world. Showcasing the richness and longevity of the First Nations community's history and culture was a priority for the event organisers (see case study *Centring First Nations voices in the festival program* on page 29). The core objective was to highlight the deep connection of First Nations peoples to their land, community and culture, while also acknowledging the ongoing social justice challenges presented by colonisation.

*Marri Madung Butbut* ('Many Brave Hearts') was the largest program dedicated to all First Nations LGBTQIA+SB\* communities to call Australia home and hosted 18 major events.

The gathering space successfully amplified the key messages and unique voices of First Nations artists and performers.

## The Human Rights Conference (HRC) attracted a broad array of attendees for a diversity of outcomes – with the vast majority of those surveyed reporting fulfilling their goals.

The conference brought together international scholars, political leaders and community members, and included regional spotlights on both progress and challenges in Asia Pacific to strengthen global connections as well as advocacy efforts (see case study *Using the Human Rights Conference to affect change within Asia Pacific* on page 34).

The largest group of attendees were activists and advocates, who comprised 20% of all attendees (Chart 3), followed by those supported under the Sydney WorldPride Scholarship program (16%) who received financial support to attend the conference.

Surveyed attendees of the Human Rights Conference were asked if they had goals that they wished to achieve at the conference, such as connecting with other people. Of those that reported setting goals, all achieved at least one of their goals, with 40% achieving all of their stated goals.

**Chart 3:** Attendees at the Human Rights Conference



Source: Human Rights Conference survey based on question, *Which of the following best describes the capacity in which you attended the Human Rights Conference?* (n=190)

## Ultra Violet was the first dedicated party for women and gender diverse people.

Ultra Violet was the largest event to ever be hosted at Town Hall. The event included DJs and Producers Sveta Gilerman (she/her) and Jess Hill (she/her) and brought together burlesque, performance art, visual art, cabaret and drag kings backed by some of the most prolific LGBTQIA+ talent, including crowd favourite, Magda Szubanski (she/her) as Sharon Strzelecki.

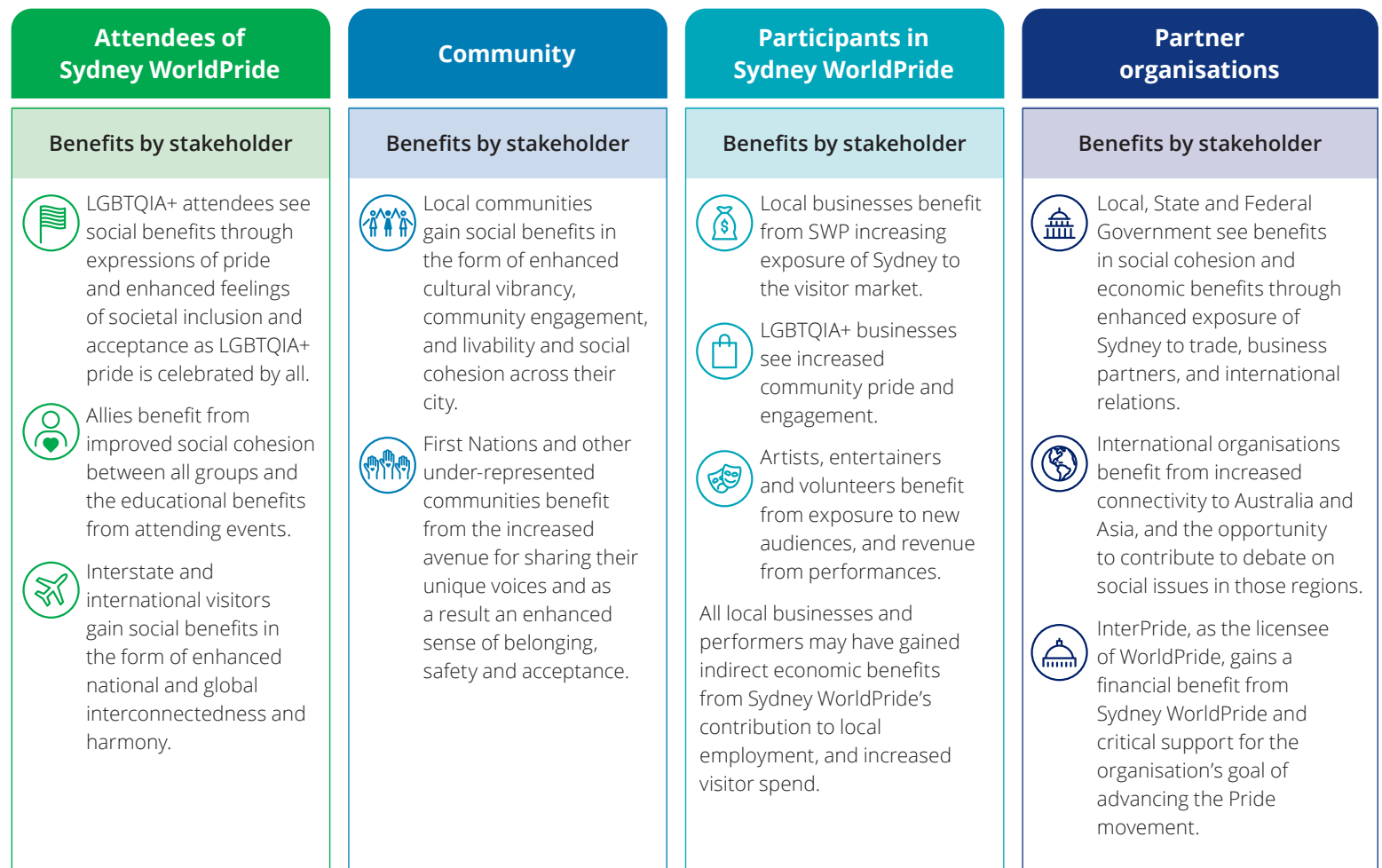
\* SB refers to 'sistergirls' and 'brotherboys'. Some Aboriginal communities use these terms to describe transgender people and their relationships.

# Economic and social benefits across a range of stakeholders

The invitation to attend Sydney WorldPride was open to all – from international LGBTQIA+ performers to interstate visitors, local allies and supporting business partners.

The figure on the right sets out the key stakeholders of Sydney WorldPride, including the local attendees, visitors, volunteers, artists and businesses, and the benefits associated with each stakeholder group.

**Figure 4:** The key stakeholders of Sydney WorldPride and economic and social benefits realised





# Economic contribution summary

Sydney WorldPride 2023 contributed \$185.6 million in value added to the New South Wales economy, with associated employment of 1,699 full time equivalent (FTE) jobs.

Economic contribution studies provide a snapshot of the contribution of an entity or industry, or in this case Sydney WorldPride 2023, to the economy at a point in time. The headline contribution metrics are included in the table below.

**Table 1:** Economic contribution of Sydney WorldPride

Measures of contribution	Direct	Indirect	Total
Value added (\$m)	82.4	103.2	185.6
Employment (FTE)	1,028	672	1,699

Source: Deloitte Access Economics

## Direct value added

The direct value added demonstrates the returns generated from the direct labour and capital inputs of event hosting operations, and businesses servicing visiting attendees and artists.

## Indirect value added

The indirect supply chain effects from the demand for goods and services generated in other sectors as a result of direct economic activity associated with Sydney WorldPride 2023.

Further details on the approach are provided in Appendix 2.

**Figure 5:** Components of the economic contribution of Sydney WorldPride



### Sydney WorldPride Limited and Sydney Gay and Lesbian Mardi Gras

The planning and hosting activity associated with Sydney WorldPride contributed **\$40.2 million** in valued added to the New South Wales economy and supported **291 FTE jobs**.



### Attendees

Induced attendees contributed **\$141.0 million** to the NSW economy and supported **1,366 FTE jobs** through their expenditure on things such as accommodation, food and beverages, and shopping and transport.



### Artists

Induced artists contributed **\$4.4 million** to the NSW economy and supported **42 FTE jobs** through their expenditure in NSW.



### Volunteers

Volunteers contributed **\$2.4 million** in foregone wages as a result of time spent participating in the festival. However, the value of volunteer time is not included in measures of the overall economic contribution of Sydney WorldPride.

# Economic contribution of operational activity

The planning and hosting activity associated with Sydney WorldPride contributed \$40.2 million in value added to the New South Wales economy and supported 291 full-time equivalent (FTE) jobs.

Sydney WorldPride Limited and Sydney Gay and Lesbian Mardi Gras are the two event organisations responsible for planning and hosting the Festival.

As both entities are not-for-profit organisations, the direct contribution largely reflects the wages paid to employees (or returns to labour). Combined, the host organisations directly contributed \$12.7 million to the Australian economy, and supported 82 FTE jobs.

Through the purchase of intermediate goods and services to facilitate event host operations, the Festival generated \$27.6 million in value added and supported 208 FTE jobs. The bulk of the indirect activity flowed to the Heritage, Culture and Performing Arts (\$16.9 million in value added or 48% of indirect activity), and Professional, Scientific and Technical Services (\$11.0 million in value added or 31% of indirect activity) industries.

**Table 2:** Economic contribution of event planning and hosting activity, 2023

Measures of contribution	Direct	Indirect	Total
Value added (\$m)	12.7	27.6	40.2
Employment (FTE)	82	208	291

Source: Deloitte Access Economics



334 Sydney WorldPride supported events were planned and hosted by a range of local businesses as part of Pride Amplified

## Economic contribution

82

Direct FTE jobs supported by host organisations

77%

of host organisation employees identify as LGBTQIA+

8%

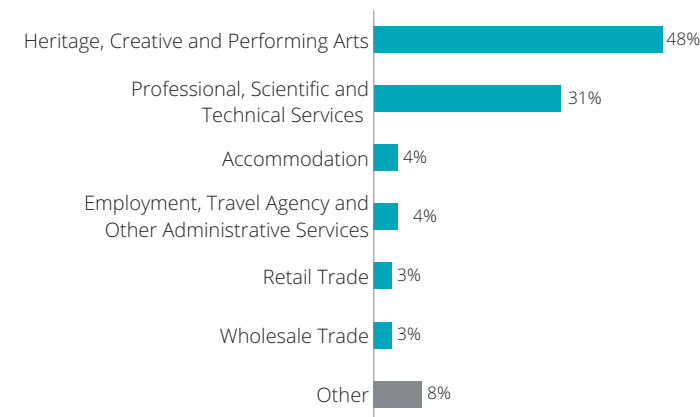
of host organisation employees identify as non-binary

2.5

Indirect FTE jobs for every direct FTE job supported by host organisations

## Indirect economic contribution

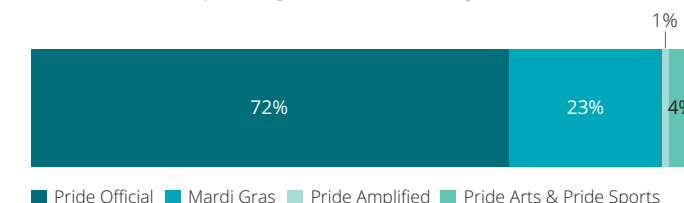
**Chart 4:** Indirect economic contribution of operational activity



## Labour expenditure

The host organisations directly employed 82 full-time equivalent workers, with associated labour expenses of over \$13.3 million. The bulk of the planning and hosting activity was concentrated towards Pride Official events.

**Chart 5:** Labour spending shares of host organisations



Source: Deloitte Access Economics, Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras operational data

# Visitor contribution from attendees

Visiting Festival attendees injected a total of \$228.7 million in induced tourism spend into the New South Wales economy, resulting in an attendee tourism contribution of \$141.0 million in value added and 1,366 FTE jobs.

The activity associated with a visiting Festival attendee is considered induced if the attendee either travelled to New South Wales specifically to attend the Festival or extended their stay in New South Wales to attend the Festival.

The translation of total Festival attendances to induced attendees is depicted in Chart 6, with key metrics used to inform the tourism contribution estimation shown in Table 4.

This approach is detailed further in Appendix 2, and is consistent with current best practice conventions for event based economic impact measurement.

**Table 3:** Tourism contribution from induced attendees, 2023

Measures of contribution	Direct	Indirect	Total
Value added (\$m)	67.6	73.4	141.0
Employment (FTE)	917 <sup>a</sup>	449	1,366

Source: Deloitte Access Economics

Notes: (a) The concept of FTE in the context of the tourism contribution of an event can be somewhat abstract as the bulk of the spending is concentrated during the event period, it is important to interpret the figures accordingly.

## Unique attendee contribution

**\$228.7m**

Induced tourism spend to the NSW economy

**78,807**

Induced attendees who came to NSW to attend Sydney WorldPride

**1,868**

Attendees extended their stay in NSW to attend Sydney WorldPride

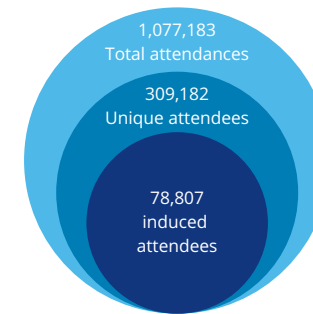
**\$141.0m**

Value added to the NSW economy from induced attendee activity

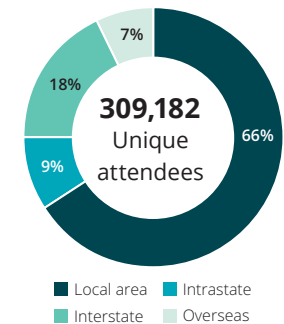
**1,366**

FTE jobs supported by induced attendee activity

**Chart 6:** Attendee breakdown



**Chart 7:** Unique attendees by region



**Table 4:** Festival attendee profiling

	Local area	Intrastate	Interstate	Overseas
Average events per attendee	3.6	2.4	3.3	4.5
Induced share of attendees	N/A	71%	80%	71%
Average length of stay (#)	N/A	4.6	6.9	10.8
Average spend per night (\$)	N/A	287	396	497

**84%**

Of attendees surveyed identified as LGBTQIA+

**36%**

Of attendees were less than 35 years old

**4 in 10**

Attendees lived only with their partner

Sources: Deloitte Access Economics, Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras attendance data. Attendee survey Notes: (b) This figure includes spend on tickets to WorldPride events. Ticketing spend is ultimately removed when determining the tourism contribution to avoid any double counting against the operational activity contribution estimates. (c) Attendance figures capture attendance and participation across all Sydney WorldPride events, including official events, WorldPride Arts, WorldPride Sports, and Pride Amplified events.



# Contribution and experience of artists



Visiting Festival artists injected a total of \$6.8 million in induced tourism spend into the NSW economy, resulting in an artist tourism contribution of \$4.4 million in value added and 42 FTE jobs.

Artists associated with the Festival contributed to the State economy in two ways: (1) through the induced tourism spend of artists from outside of the local area, and (2) through the fees earned through Festival performances, particularly those paid to local artists, that were subsequently injected back into the economy through household spending activities

Overall, visiting artists contributed \$2.1 million in direct value added and \$2.3 million in indirect value added to the New South Wales economy. This equates to a total of 29 direct FTE jobs and 14 indirect FTE jobs.

The adjacent charts provide a specific perspective of the unique experience of artists at the Festival.

**Table 5:** Tourism contribution from induced artists, 2023

Measures of contribution	Direct	Indirect	Total
Value added (\$m)	2.1	2.3	4.4
Employment (FTE)	29	14	42

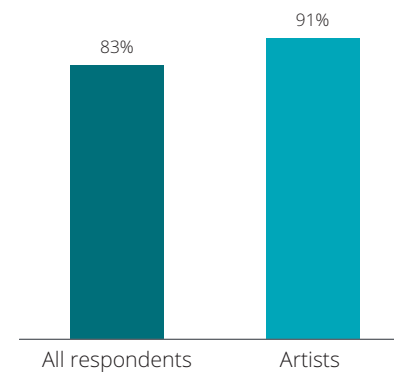
Source: Deloitte Access Economics



The host organisations paid out over \$5 million dollars in artist and creative fees.<sup>a</sup>

Notes: (a) This amount is not additive to the overall economic contribution, as it is already captured in the value added of planning and hosting activities

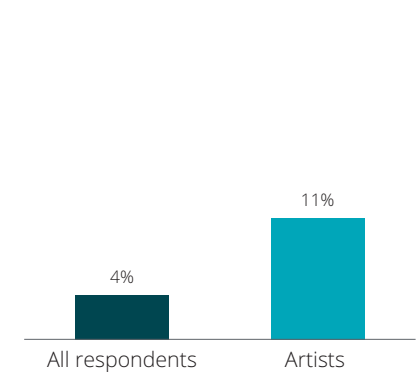
**Chart 8:** Identify as LGBTQIA+



**1.1x** More likely to be LGBTQIA+

Source: Attendee survey, All (n=10,030), artists (n=160)

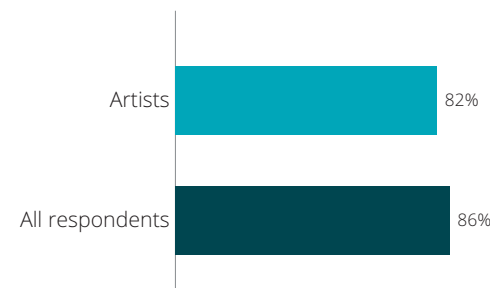
**Chart 9:** Identify as First Nations



**2.8x** More likely to be First Nations

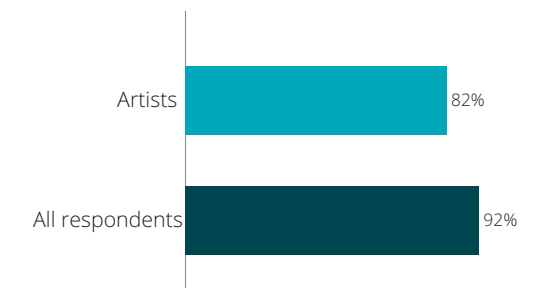
Source: Attendee survey, All (n=10,030), artists (n=160)

**Chart 10:** WorldPride enhanced Sydney's reputation as an arts and entertainment capital



Source: Attendee survey, All (n=6,437), artists (n=117)

**Chart 11:** I felt safe at Sydney WorldPride



Source: Attendee survey, All (n=6,437), artists (n=117)

# Contribution and experience of volunteers

Sydney WorldPride volunteers contributed \$2.4 million in foregone wages as a result of time spent participating in the festival.

Volunteer labour was critical to the output of Sydney WorldPride and ensured the host organisations' ability to deliver quality experiences for attendees and participants. A survey of Sydney WorldPride volunteers provided estimates of volunteer hours throughout the festival. Deloitte Access Economics has converted this data to a measure of the value of volunteer time by assigning a (foregone) wage rate to the total number of hours worked by volunteers.

## Economic value of volunteer hours

**15.4**

Average hours volunteered per Sydney WorldPride volunteer

**52,233**

Estimated total hours volunteered at Sydney WorldPride

**\$2.4m**

Economic value of volunteer time

A total of around 3,450 volunteers each contributed an average of 15.4 hours of personal time to support Sydney WorldPride events, from the Parade to the Human Rights Conference. This equates to a value of \$2.4 million based on a foregone wage or replacement cost method of valuing volunteer time.

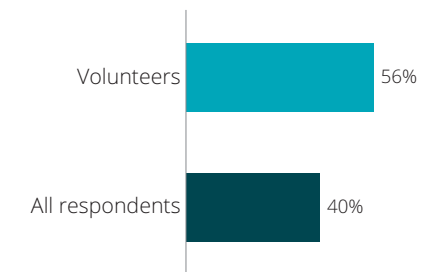
The demographic profile of volunteers was broadly similar to the full respondent group. As such, the adjacent charts focus on the unique experience of volunteers at Sydney WorldPride.

**Chart 12:** Attending Sydney WorldPride increased my understanding of issues faced by LGBTQIA+ people



Source: Attendee survey, All (3,195), volunteers (n=115)

**Chart 13:** After attending WorldPride, I am more likely to use peoples' preferred pronouns



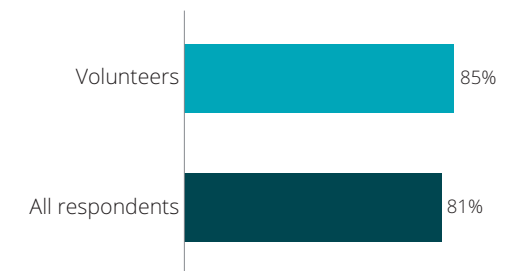
Source: Attendee survey, All (3,195), volunteers (n=115)

**Chart 14:** Sydney WorldPride increased the level of acceptance for LGBTQIA+ people in Sydney



Source: Attendee survey, All (n=3,195), volunteers (n=115)

**Chart 15:** Sydney WorldPride increased my sense of belonging within the LGBTQIA+ community



Source: Attendee survey, All LGBTQIA+ respondents (n=6,437), LGBTQIA+ volunteers (n=101)



# Gather, Dream, Amplify: the social impact of Sydney WorldPride

The economic and social benefits of Sydney WorldPride were realised by many stakeholders, from attendees and participants to global communities and advocacy groups.

CEO of Sydney WorldPride Kate Wickett (she/her) described the festival as a ‘party with a purpose’,<sup>1</sup> recognising that the social and wellbeing benefits of global pride events are well established, including in academic literature.

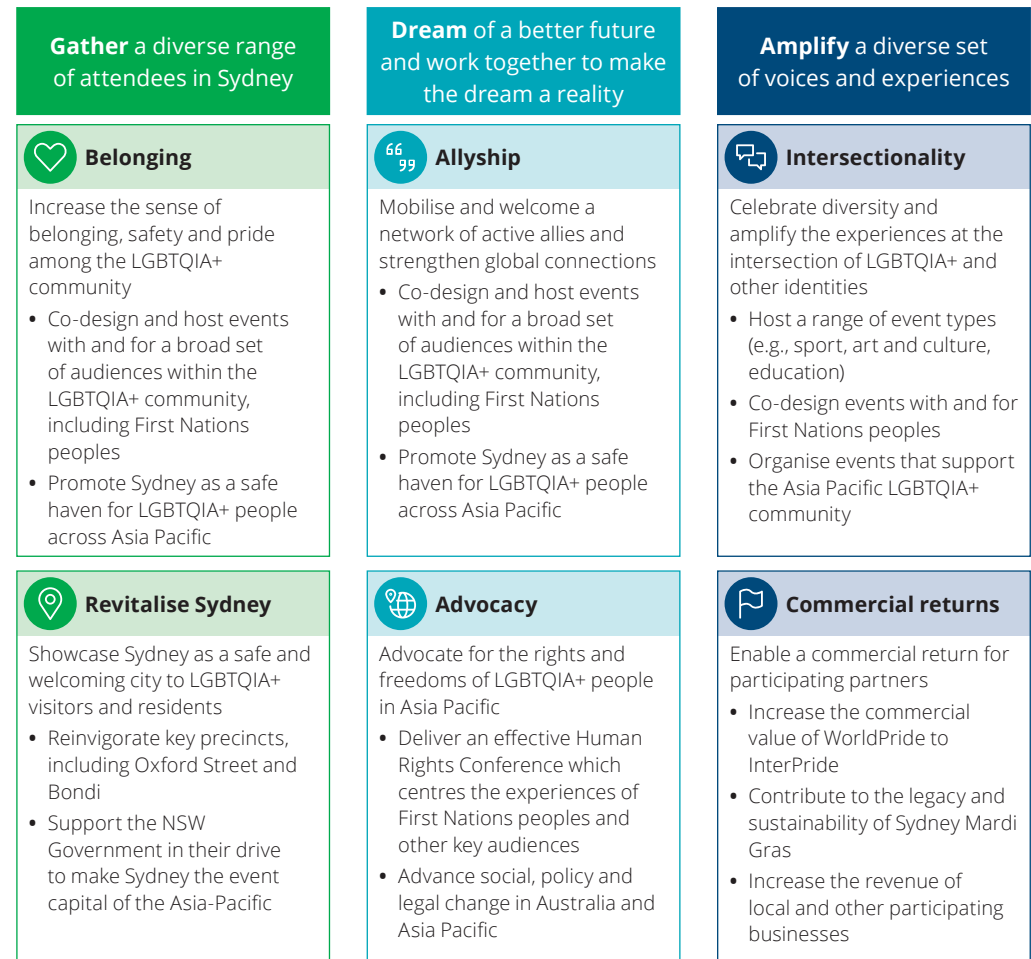
These benefits include:

- facilitating social connectedness and a sense of belonging across the community – which can combat systemic discrimination and bolster resilience, including to suicidality.<sup>2</sup>
- strengthening visibility and acceptance of the LGBTQIA+ community.<sup>3</sup>
- challenging norms, assumptions and dominant discourses about sexuality and gender, to normalise and validate LGBTQIA+ identities.<sup>4</sup>

- mobilising the ally community and raising awareness of the role of allies.<sup>5</sup>
- providing opportunities to foster activism and advocacy against inequalities, where experiences of distress can be transformed into actions for social change.<sup>6</sup>

Summarised in the figure on the right, the festival theme Gather, Dream, Amplify provides a framework for understanding the social benefits and legacy of the festival for a diversity of stakeholders.

**Figure 6:** A framework to understand the broader benefits of Sydney WorldPride



Source: Deloitte Access Economics, Sydney WorldPride theme statement



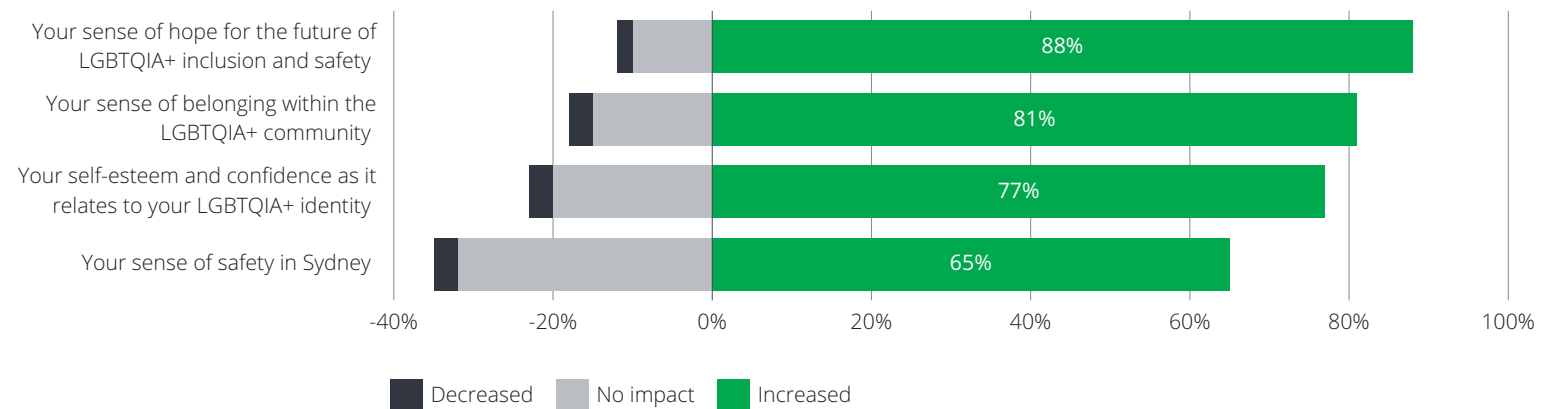
# Increasing belonging for a community of visitors

Sydney WorldPride sought to increase the sense of belonging, safety and pride among the LGBTQIA+ community.

Sydney WorldPride sought to strengthen belonging, safety, pride and acceptance by co-designing and hosting events with and for a broad set of audiences within the LGBTQIA+ community, including First Nations peoples. As a result:

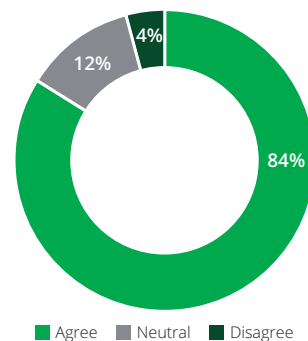
- The Festival strengthened LGBTQIA+ community members' sense of belonging (81%) and sense of safety in Sydney (65%), with flow-on effects related to self-esteem and confidence in their LGBTQIA+ identity
- The majority of attendees reported the event gave them an increased sense of hope (84%) for the future of LGBTQIA+ inclusion and safety
- Almost all LGBTQIA+ attendees felt both safe and welcome (92%) at Sydney WorldPride
- A large majority of LGBTQIA+ First Nations respondents felt safe (88%) and welcome (90%) at Sydney WorldPride. However, these figures were still lower than the broader LGBTQIA+ community indicating there is still work to be done, building on the legacy of Sydney WorldPride, to improve outcomes and perspectives of the First Nations community.

**Chart 16:** LGBTQIA+ respondents' reflections on the impact of WorldPride



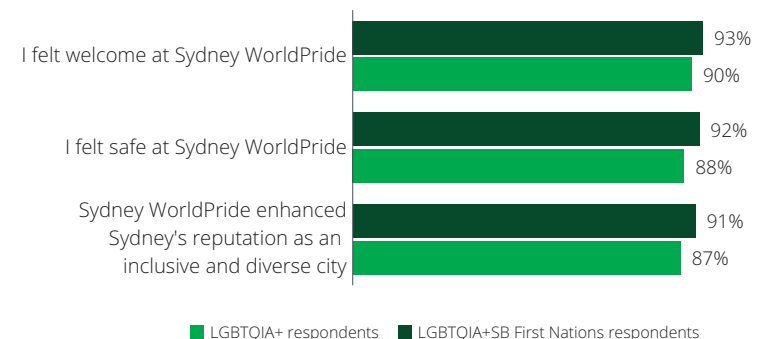
Source: Attendee survey based on question, *As a member of the LGBTQIA+ community, how did Sydney WorldPride impact the following?* (n=6,437)

**Chart 17:** Respondents on whether they connected with LGBTQIA+ people through Sydney WorldPride



Source: Attendee survey based on question, *To what extent do you agree with the following statements on the impact of Sydney WorldPride? [I connected with LGBTQIA+ people through Sydney]* (n=3,195)

**Chart 18:** LGBTQIA+ respondents on to what extent do they agree with the following statements\*



Source: Attendee survey based on question, *To what extent do you agree with the following statements?* All (n=6,437), First Nations (n=218)

Notes: \*First Nations represents all First Nations people, not just Aboriginal and Torres Strait Islander people

# Revitalising Sydney's brand as vibrant and open for business

Sydney WorldPride sought to showcase Sydney as a safe and welcoming city to LGBTQIA+ visitors and residents.

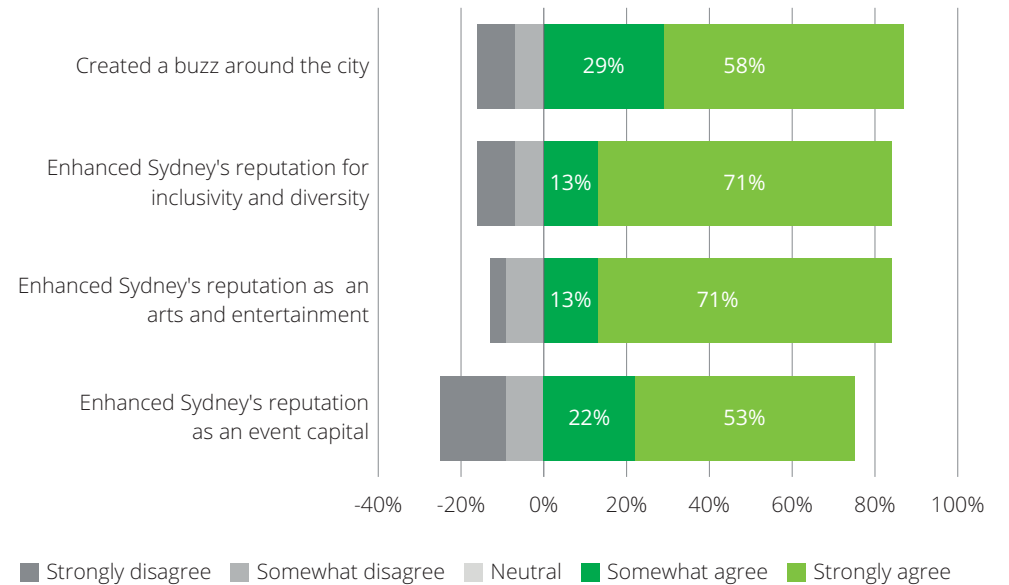
Key objectives of Sydney WorldPride related to revitalising Sydney were to showcase Sydney as a safe and welcoming city to LGBTQIA+ visitors and residents, and to revitalise Sydney as a global event capital.

Survey results for local artists and businesses indicate that the Festival:

- **Enhanced Sydney's reputation** with the majority of businesses agreeing that WorldPride enhanced:
  - Sydney's reputation for inclusivity and diversity (84%)
  - Sydney's reputation as an events (75%), arts and entertainment capital (84%)

- **Provided opportunities for local artists**, with the majority of artists who were surveyed reporting that, as a result of participating in Sydney WorldPride, they:
  - expect to receive more artistic opportunities (54%)
  - increased their following (60%)
- **Delivered benefits to businesses**, with a majority of businesses surveyed agreeing that Sydney WorldPride:
  - enabled their business to publicise its commitment to LGBTQIA+ inclusion (73%),
  - created a buzz around the city (87%).
  - reiterated that being LGBTQIA+ inclusive is important to their business (85%)

**Chart 19:** To what extent do you agree with the following statements about Sydney WorldPride?



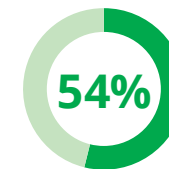
Source: WorldPride Business Survey, (n=45)



Of the artists surveyed:



agreed that participating in Sydney WorldPride has **"helped to grow my following"**



**expect to receive more opportunities** as a result of participating in Sydney WorldPride

Source: WorldPride Artist Survey, (n=115)

# Centring First Nations voices, perspectives and performances

Primarily located on Gadigal land, Sydney WorldPride set out to centre the distinct experiences and identities of LGBTQIA+SB\* and First Nations people.

## First Nations lived experience was embedded into the festival design.

In October 2019, Sydney was selected to host WorldPride. From its inception, Sydney WorldPride integrated the lived experiences of First Nations communities into the fabric of the Festival.

A key example is the recruitment of First Nations people as leaders in the organisation, including First Nations Co-Creative Director, Ben Graetz (an Iwaidja and Malak Malak man). Including First Nations representation at the executive level, rather than just through an advisory group, was a world-first for First Nations inclusion in Pride. By ensuring Graetz was a part of the original bid, in late 2019, Sydney WorldPride embedded the principle of *'nothing about us without us'* into festival design from its inception:



*"The legacy of the Festival is proof that you can do it. You can include First Nations peoples at the ground, management and executive level. You can ensure they are self-determined and supported."*

**– Ben Graetz, First Nations Co-Creative Director for the Festival**

- Establishing a dedicated First Nations Advisory Committee and adopting a decision-making process focused on consensus. The Advisory Committee comprised of 16 First Nations leaders from across Australia, representing each state and territory. Their insights informed the development of programs and platforms to strengthen the representation of LGBTQIA+ First Nations voices. Moving forward, the Advisory Committee will continue to guide Sydney Gay and Lesbian Mardi Gras.
- Consulting extensively with a range of First Nations stakeholders, such as Blak ACON. This enabled the festival to capture the diverse and varying perspectives of Australia's First Nations peoples.

## WorldPride 2023 was an opportunity to gather First Nations people across Australia, including from regional and remote centres.

After winning the WorldPride bid, organisers implemented a series of initiatives to ensure First Nations communities were invited to and, indeed, were central participants in the Festival. This included:

- Launching a nationwide tour of First Nations rainbow communities in September 2022, designed to activate participation ahead of the Festival. Organisers met with LGBTQIA+SB mob at 11 locations all over the country.
- Establishing a discounted ticketing scheme for First Nations Australians called MobTix. The scheme aimed to increase program accessibility for First Nations peoples. It spanned a range of key events including the Opening Concert, Human Rights Conference, First Nations Gala, Rainbow Republic and all shows at Marri Madung Butbut.
- Delivering the First Nations Grants Program for local viewing events in regional centres. Grants of up to \$5,000 enabled First Nations peoples to watch the Opening Concert and the Parade from a location closer to their Country.

## The festival created a space for learning and connection.

The Marri Madung Butbut – 'Many Brave Hearts' – First Nations Gathering Space ran for six full-days of the Festival, providing a space where attendees could experience the rainbow heart of the oldest surviving culture on the planet. It included a wide a range of events, such as free exhibits, theatre, dining and drag, as well as a dedicated First Nations only space.



*"I was at the Marri Madung Butbut for all six days and I didn't want to be anywhere else. We've never had anything like that for our community – it was just phenomenal."*

**– Felix May (they/them),  
First Nations Engagement Officer  
of Sydney WorldPride**

\*SB refers to 'sistergirls' and 'brotherboys'. Some Aboriginal communities use these terms to describe transgender people and their relationships



# Centring First Nations voices, perspectives and performances

Sydney WorldPride aimed to unite First Nations peoples from across Asia Pacific, celebrating a shared respect for culture, indigeneity and liberation.

## The event programming showcased First Nations culture and talent.

Sydney WorldPride engaged First Nations businesses and performers to deliver key aspects of the Festival's branding. For instance, the Nungala Creative agency of Warramunga Wombaya artist Jessica Johnson was employed to create Sydney WorldPride's iconic logo and visual identity.

First Nations inclusion was also a priority in programming the Festival's headline events.

First Nations performers were featured in official events such as the Live and Proud Opening Concert, including Kuku Yalanji singer Jessica Mauboy.

The First Nations Gala Concert, Blak & Deadly, centred Blak voices, with a line-up of First Nations LGBTQIA+SB talent and artistry, such as Electric Fields, award-winning artist Mo'Ju and Ru Paul's Drag Race Down Under star Kween Kwon.

.....  
"I welcome each and every one of you on behalf of my Sydney tribe of sexually and gender-diverse First Nations peoples. We have our own very proud and long history and future... It is a privilege for me to walk in the path of my elders – barefoot or in heels."

– Nana Miss Koori,  
a Gadigal elder drag performer,  
from the Opening Concert'

**79%** Of First Nations attendees agree that First Nations peoples were well-represented at Pride

**77%** Of artists agree that Sydney WorldPride promotes and encourages diversity among artists and entertainers



Nana Miss Koori, Live & Proud Opening concert

Image credit: Daniel Boud



# Centring First Nations voices, perspectives and performances

It was imperative to invite and engage Asia Pacific First Nations community members to Sydney WorldPride.

To recognise the shared understanding and struggle of First Nations communities, Sydney WorldPride prioritized the voices of Asia Pacific First Nations LGBTQIA+SB peoples in the Human Rights Conference. The Conference included sessions like 'Regional Spotlights from Our Movement', and 'First Nations Justice in the Asia Pacific'.

Asia Pacific First Nations LGBTQIA+SB people were well-represented among the attendees of the Human Rights Conference – with 16% of total attendees identifying as First Nations.

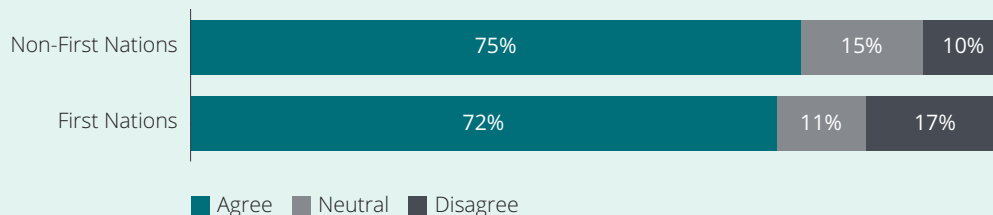
First Nations attendees came from across Asia Pacific, including Australia, Fiji, New-Zeland and Samoa.

As part of the Festival, Australian First Nations peoples designed a message stick made of recycled glass. The stick will be passed onto the First Nations peoples of the country that will next host WorldPride at every WorldPride.

.....  
"The message stick signifies that First Nations peoples should be at the centre of each Pride. We are the first story-tellers. We are the truth tellers. Hire us. Give us our seat at the table. Each WorldPride should start with us."

– Felix May (they/them),  
First Nations Engagement Officer  
Sydney WorldPride

**Chart 20:** To what extent do you agree that the Human Rights Conference enabled you to better understand LGBTQIA+SB First Nations peoples?



Source: Human Rights Conference survey, First Nations (n=29), non-First Nations (n=161)



Deborah Cheetham  
FraillonLive &  
Proud Opening concert

Image credit: Daniel Boud

# Strengthening global allyship for the LGBTQIA+ community



Sydney WorldPride helped mobilise and welcome a network of active allies and strengthen global connections.

Key objectives of Sydney WorldPride related to mobilising and welcoming a network of active allies and strengthening global connections by:

- Increasing the visibility of LGBTQIA+ people and the issues they face
- Encouraging active allyship among non-LGBTQIA+ people

The results from surveyed Sydney WorldPride attendees who did not identify as LGBTQIA+ found that the event supported a greater understanding of and support for the LGBTQIA+ community.

After attending Sydney WorldPride:

**98%**

Of non-LGBTQIA+ respondents say they understand what being an ally means

**7 in 10**

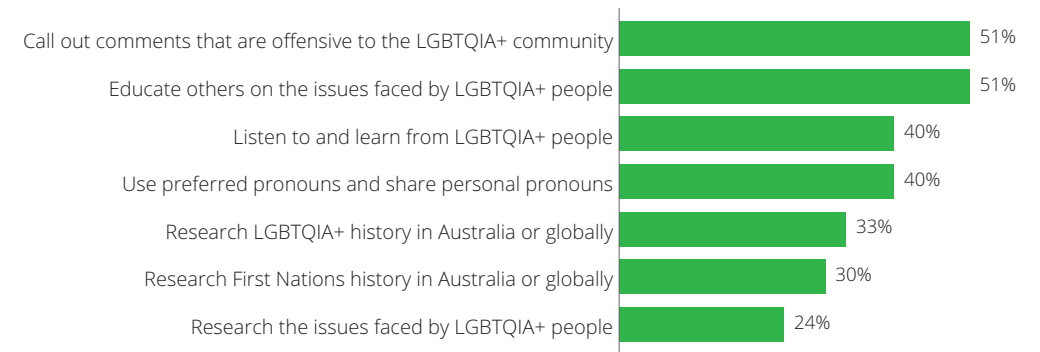
Respondents say they have a greater understanding and acceptance for LGBTQIA+ people in Sydney

**73%**

Of respondents say they connected with LGBTQIA+ allies through Sydney WorldPride

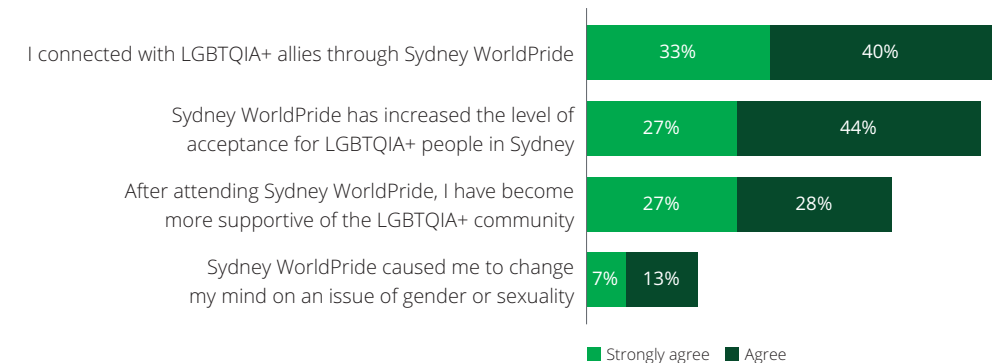
Source: Attendee survey based on questions, *Which, if any, of the following things are you more likely to do after attending Sydney WorldPride?* (n=3189) and *As a result of Sydney WorldPride, how has your allyship to the LGBTQIA+ community changed?* (n=443)

**Chart 21:** Respondents' intended actions after attending WorldPride (% more likely to)



Source: Attendee survey based on question, *Which, if any, of the following things are you more likely to do after attending Sydney WorldPride?* (n=3189)

**Chart 22:** Respondents' reflections on the impact of WorldPride (% agree)



Source: Attendee survey based on question, *To what extent do you agree with the following statements on the impact of Sydney WorldPride?* (n=3195)



# Advocating for the rights and freedoms of LGBTQIA+ people

Human Rights Conference attendees were broadly in agreement that the conference would have positive implications for LGBTQIA+ communities.

The majority of Human Rights Conference participants agreed or strongly agreed that the Conference supported and promoted:

- New government and corporate commitments to actions in support of LGBTQIA+ communities
- The development of a broader coalition of partners in the LGBTQIA+ space
- An increase in skills, networks and experiences relevant to LGBTQIA+ human rights
- Public support for the LGBTQIA+ community

After attending the Human Rights conference:



Survey respondents that attended the Human Rights Conference agreed that the Human Rights Conference would lead to **positive impacts for LGBTQIA+ communities in Sydney and globally\***

Source: Human Rights Conference survey, (n=90)  
Notes: \*excluding respondents who declined to answer/were unsure

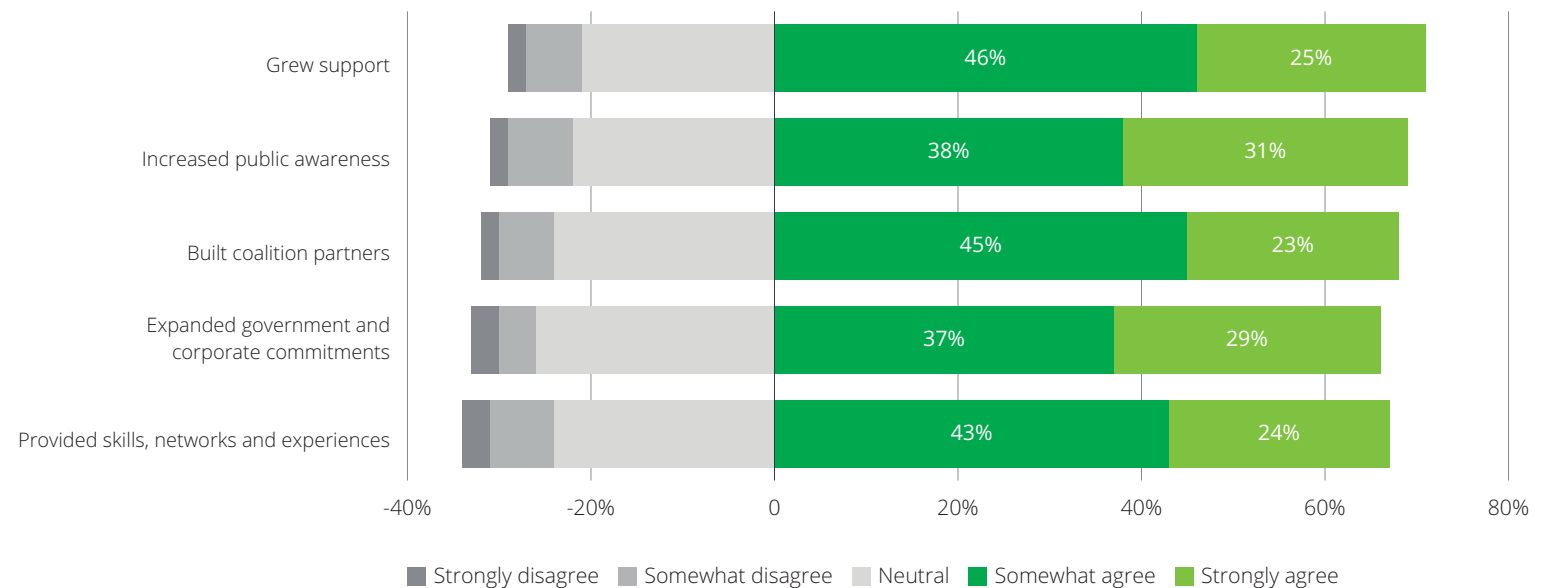
After attending Sydney WorldPride:

**1 in 4** are more likely to donate to an LGBTQIA+ organisation

**3 in 10** are more likely to volunteer at a LGBTQIA+ organisation or take political action

Source: Attendee survey based on question, *Which, if any, of the following things are you more likely to do after attending Sydney WorldPride?* (n=3189)

**Chart 23:** Perspectives of Human Rights Conference attendees on the likely implications of the Human Rights Conference



Source: Human Rights Conference attendee survey based on question, *To what extent do you agree that HRC achieved the following* (n=190)

# Using the Human Rights Conference to affect change within Asia Pacific

WorldPride's first Human Rights Conference in the Southern Hemisphere signified Australia's position as a safe gathering place with a genuine commitment to supporting the rights of LGBTQIA+ communities across Asia Pacific.

The Conference's 3,200 attendees, both in person and online, representing over 60 countries, included international human rights defenders, legal experts, sportspeople, celebrities, academics, grassroots advocates, corporates, Special Envoys and UN representatives.

Sydney WorldPride CEO, Kate Wickett reflected on the opportunity of the event as a catalyst for progress on human rights across the region:

.....  
"This has the potential to not only be the most consequential of our Sydney WorldPride events, but perhaps the most consequential event for the LGBTQIA+ community in the Asia Pacific region."

– Kate Wickett CEO, Sydney WorldPride

**The Conference was an important point of connection for community members, governments, and change makers.**

The program was a collaborative effort built by the International Advisory Board. The event built international connections between policymakers and community members.

Pre-Conference caucuses, receptions and multi-lateral meetings connected law- and policy-makers with the leaders of the movement, building momentum for change across the globe.

.....  
"When you leave this place and go back to your homes – whether that be across the bridge, across the country or across the seas – we want you to feel part of an unstoppable movement for change."

– Anna Brown OAM, CEO of Equality Australia, lead community partner for the HRC

The Conference was informed through a consultation process undertaken by Equality Australia, including an online community survey with 1,334 responses from 55 countries and 23 stakeholder workshops, the findings from which were published in the *What We Heard Report*.<sup>1</sup>

Respondents from the consultation process requested a variety of considerations be made in terms of accessibility, diversity and visibility. These requests included online access, providing wellbeing services, ensuring diversity among speakers, amplifying the voices of marginalised communities, sharing information to grow the movement and networking events to grow the community.

These requests helped build the 6 core themes of the Conference program:

- Community and Culture
- Health and Wellbeing
- Visibility and Inclusion
- Justice and Freedom
- Development, Education and Digital
- Workshops and Networking.

.....  
"The spotlight is so important. Whoever controls the spotlight mobilises what's on the ground. All we want is the same rights that everyone else has. These are not new rights we're fighting for."

– Ymania Brown (She/Her), Strategic Adviser for the Human Rights Conference, Equality Australia

# Using the Human Rights Conference to affect change within Asia Pacific

## The Human Rights Conference was leveraged to advocate for positive policy change supporting the rights and freedoms of LGBTQIA+ people in Asia Pacific

Foreign Minister Penny Wong (she/her) announced a package of reforms coinciding with the Human Rights Conference, including a new fund with an initial allocation of \$3.5 million to support LGBTQIA+ organisations and networks in Asia Pacific, a human rights engagement strategy, and a new LGBTIQ unit in the Department of Foreign Affairs and Trade.<sup>1</sup>



“We recognise that to act meaningfully, we must act in support and alignment with those on the ground.

We will listen to the voices, views and priorities of LGBTQIA+ human rights defenders and civil society.

The voices of those who best know the context, challenges and opportunities in their countries.”

– Senator the Hon Penny Wong, remarks to the Human Rights Conference

Australia’s investment will begin with an increased contribution to the US-led Global Equality Fund to provide emergency assistance to human rights defenders and LGBTQIA+ organisations in the region.

In addition, DFAT will consult widely to establish an LGBTQIA+ human rights engagement strategy which will include bilateral and multilateral diplomacy, development and humanitarian assistance.

Attendees reported a positive impact of attending the Conference, including a better understanding of issues facing LGBTQIA+ communities in Asia Pacific

8 in 10 attendees said that attending the Human Rights Conference increased their understanding of the issues faced by LGBTQIA+ people in Asia Pacific, and 7 in 10 agreed that the Conference provided them with the skills, networks and experiences to create change in their local communities (chart right).

**3,200**

Conference attendees, including 1,200 online

Source: Equality Australia

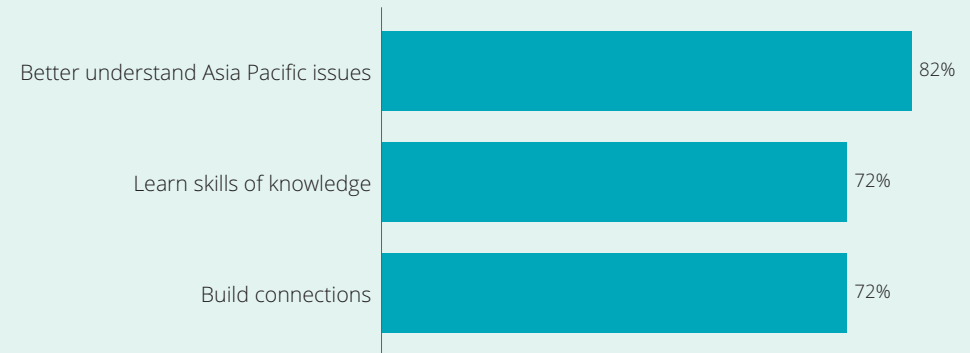
**227**

Presenters, across 106 sessions and 3 days

**60+**

Countries and regions represented

**Chart 24:** To what extent do you agree that the Sydney WorldPride Human Rights Conference enabled you to:



Source: Human rights conference survey, (n=188)



# Live & Proud Opening Concert

Image credit: Daniel Boud







# Celebrating intersectionality and diversity

Sydney WorldPride aimed to recognise the importance of intersectionality in the LGBTQIA+ community and promote diverse experiences.

Key objectives of Sydney WorldPride related to celebrating diversity and amplifying experiences at the intersection of LGBTQIA+ and other identities, included:

- Host a range of event types (e.g., sport, art and culture, education)
- Co-design events with and for First Nations peoples
- Organise events that support Asia Pacific LGBTQIA+ communities

Sydney WorldPride prioritised intersectionality through organising events centred on the voices and experiences of marginalised groups within the LGBTQIA+ community, as illustrated by the case studies in this report on promoting First Nations voices, advocating for change in Asia Pacific, and celebrating gender-diverse communities.

After attending Sydney WorldPride

**4 in 5**

are more likely to donate to an LGBTQIA+ organisation

**77%**

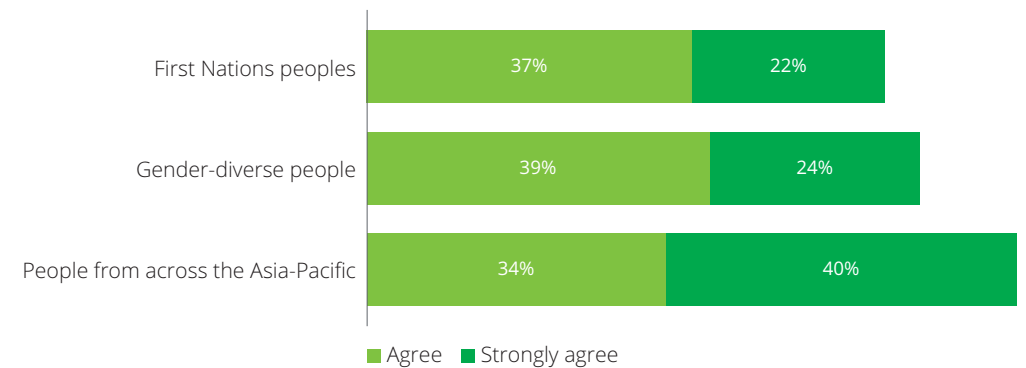
of respondents agreed that Sydney WorldPride promotes and encourages diversity among artists and entertainers

**3 in 4**

respondents report a somewhat or strongly increased understanding of a part of the community they do not identify with.

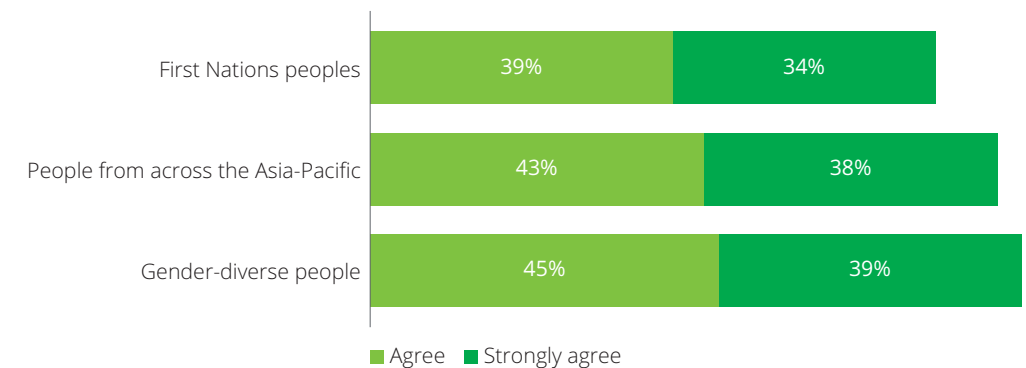
Source: Attendee survey based on the questions, *Please indicate to what extent you agree with the following questions* (n=115), and *As a member of the LGBTQIA+ community, how did Sydney WorldPride impact the following?* (n=2745)

**Chart 25:** Respondents gained a greater understanding of the issues faced by the following communities



Source: Attendee survey based on question, *I gained a greater understanding of the issues faced by* (n=214-3,098)

**Chart 26:** Respondents felt the following communities were well-represented at Sydney WorldPride



Source: Attendee survey based on question, *The following groups were well-represented at Sydney World Pride* (n=208-3,006)

# Enabling a commercial return for partner businesses

Sydney WorldPride enabled a commercial return for participating partners and allowed them to build their brand and demonstrate support.

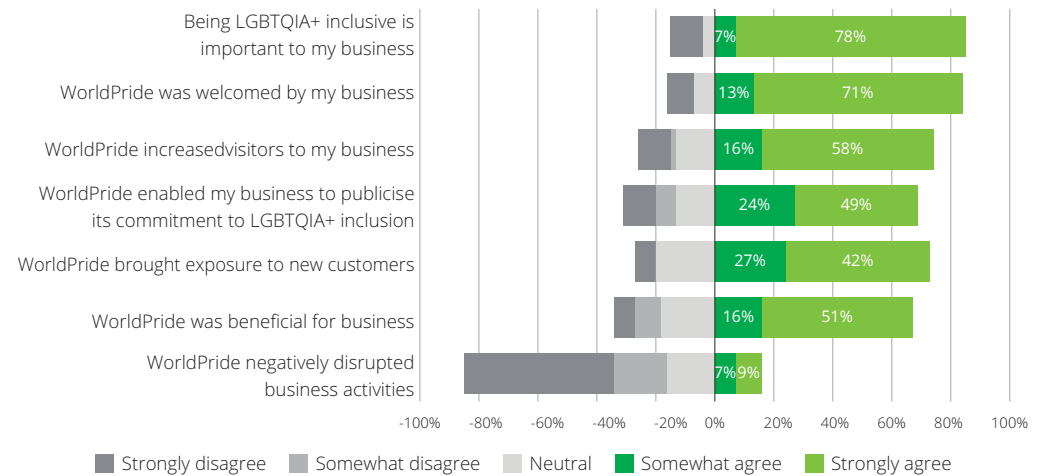
WorldPride 2023 also brought substantive benefits to local businesses across the Oxford Street precinct. These benefits included:

- Increasing the revenue of local and participating businesses, of which 49% reported an increase in revenue compared to the previous month.
  - According to Airwallex, businesses supporting the events had seen a 11.9% increase in transactions during WorldPride compared to a 4.1% increase for all other businesses<sup>1</sup>.
- It enabled businesses to publicise their commitment to LGBTQIA+ inclusion (73% of local businesses surveyed agree), brought visitors to their local area (69%) and exposed them to new customers (67%) (Chart 27).

- Local businesses participated actively and visibly in Sydney WorldPride, with 60% of those surveyed putting up decorations for WorldPride. 20% of local businesses surveyed hosted a WorldPride event, both through the Pride Amplified program and independently. (Chart 28).

A broader economic contribution of the festival (quantified on pages 17-19) reflects the outcomes of increasing the financial sustainability of Sydney Gay and Lesbian Mardi Gras through the event, and increasing the commercial value of WorldPride to InterPride.

**Chart 27:** To what extent do businesses agree with the following statements?



Source: Survey of local businesses engaged in Sydney WorldPride, (n=45)

**Chart 28:** During Sydney WorldPride, did your business do any of the following?



Source: Pride Amplified Survey, (n=36)



# Broader benefits of Sydney WorldPride through Pride Amplified

Pride Amplified allowed local businesses to get the most out of Sydney WorldPride.

Pride Amplified allowed local businesses to host events with the sponsorship support of Sydney WorldPride. A total of 344 events, capturing 194,914 attendances, were held by a range of local businesses as part of the Pride Amplified program.

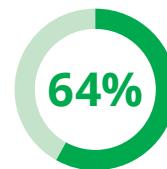
A survey of Pride Amplified hosts captured feedback from 37 local businesses, in total covering approximately 50% of the Pride Amplified event program. The survey revealed:

- An estimated 6% were First Nations Pride Amplified events.
- There were an average of 4 people – including artists, contractors, employees, and volunteers - engaged to facilitate Pride Amplified events. Extrapolating this across the total Pride Amplified program reveals around 1,300 people contributed to event planning and hosting.
- Hosts were positive about the effects of Pride Amplified, with a majority claiming that it “helped to publicise their business’ commitment to LGBTQIA+ inclusion” (70%), that it was a “positive branding experience” (64%) and that it “brought new audiences” to their business (52%).

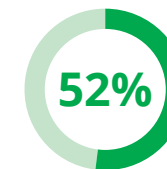
Respondents that hosted a Pride Amplified event found that hosting the event:



Helped to publicise their business’ commitment to LGBTQIA+ inclusion



Was a positive branding experience



Brought new audiences to their business

Source: Pride Amplified survey, (n=37)

**1 in 2**

Pride Amplified events were free to attend

**10 hours**

Of volunteer time contributed to each Pride Amplified event

**1 in 2**

Events were arts and culture related events

**2.1 artists**

Contributed an average of 10.3 hours each per event



# Celebrating and supporting trans and gender diverse communities

The explicit inclusion of minority groups within the LGBTQIA+ community remains an imperative for Sydney's Pride events.

The trans community has received continued political focus, negative social commentary, and harassment and abuse across Australia, including in the weeks following WorldPride.

This highlights the need to create a safe space for the trans and gender diverse communities through further community-building activities and targeted advocacy, utilising the momentum and benefit of allies to these groups within the LGBTQIA+ community.

## Trans speakers were given a platform and trans voices were highlighted across Sydney WorldPride.

In planning the portfolio of events for WorldPride, organisers ensured there were specific events that centred the voices and experiences of trans and gender diverse communities. The parade float entries also included some that were dedicated to trans rights and narratives. These events included:

- Six sessions at the Human Rights Conference which centred on the trans experience covering threats to trans inclusion, protecting trans people in prison, the role of beauty pageants, bodily autonomy and creating an affirming future.
- A wide array of cultural performances by trans and gender diverse artists. For example, Queens of Joy was a celebration of trans voices and included kings, queens, spoken word and music. It also had an afterparty with trans DJs, roving performances and dance.
- A host of educational events to advance understanding on trans issues. For instance, Archer Magazine Queer Ideas Forum on Gender, Sex Work and Polyamory was a deep dive into the topics around sex, gender and identity.
- Supports for trans inclusive sporting events such as Sydney Inner West Council's pride amplified safe swimming event for trans and gender diverse people.
- A range of trans-inclusive parade floats, including Parents for Trans Youth Equity, Trans Pride Australia, Trans Australia & Allies, Trans Glamore and the Universal Life Church 'No pride in religious transphobia' floats.

Prime Minister Anthony Albanese was the first sitting Prime Minister to participate in the Parade, signalling increased support for gender and sexual minorities.

.....  
"We need to be a country that respects everyone for who they are."  
– Prime Minister Anthony Albanese

Despite the current and ongoing marginalisation of trans and gender diverse communities, many survey respondents (200, 86%) reported that at Sydney WorldPride, their sense of hope for the future of LGBTQIA+ inclusion and safety had increased.

**Chart 29:** For trans and gender diverse respondents, how did Sydney WorldPride effect the following?



Source: Attendee Survey (trans and gender diverse participants), (n=200)

# Celebrating and supporting trans and gender diverse communities

## **During WorldPride, there was policy change to support the needs of trans and gender diverse communities.**

- During Sydney WorldPride, some key policy announcements were made which support accessible healthcare for trans and gender diverse communities, including:
  - A new national LGBTQIA+ health plan and \$26m in research funding.
  - Alex Greenwich’s Equality Bill was introduced to the NSW Parliament which included noting an opportunity to reform the ID documents process.
  - Australian Capital Territory is set to become the first place in Australia to ban unnecessary and non-consensual medical procedures on intersex people.
  - A bilateral commitment to outlawing conversion practices ahead of the NSW State election.
- A focus on LGBTQIA+ inclusion across the region also saw a spotlight on the need for domestic investment. During the Conference the Albanese Government announced a 10 year National Action Plan for the health and wellbeing of the LGBTQIA+ community and a \$26 million investment in healthcare and medical research focusing on LGBTQIA+ people funded through the Medical Research Future Fund, addressing Equality Australia’s call for funding.



“LGBTQIA people have significantly poorer mental health, disparities in other health outcomes and can often struggle to get the right care and treatment... Quite simply, this plan will save lives.”

– Equality Australia CEO  
**Anna Brown, remarks to the Human Rights conference on the \$26 million investment in healthcare**



“We will put [gender and sexually diverse people] at the heart of the co-design process. For far too long you have been without the support of the government. I see you. I hear you, and I want to stand with you. I can’t wait to work with you.”

– Ged Kearney, Assistant Minister  
**for Health and Aged Care at the Human Rights conference on the National Action Plan for the health and wellbeing of the LGBTQIA+ community**

## **There is still an ongoing commitment and more policy that will be required to support trans and gender diverse communities.**

People with a trans experience are 67% more likely to be out of work, 22% less likely to say they are engaged and 13% less likely to report feeling safe at work compared to those with a diverse sexual orientation (Pride in Diversity AWEI 2022 Survey). Policy and practice can address specific barriers to inclusion for transgender and gender-diverse team members.



Live & Proud Opening Concert

Image credit: Daniel Boud





# The legacy of Sydney WorldPride

Sydney WorldPride was an opportunity to celebrate progress, and to define the next frontier for inclusion of LGBTQIA+ communities in Australia and Asia Pacific.

The event was an important vehicle by which to support belonging, safety and pride among the LGBTQIA+ community, showcase Sydney as a safe and welcoming city, celebrate intersectional experiences, and advocate for the rights and freedoms of LGBTQIA+ people in Asia Pacific.

.....  
"Sydney WorldPride exemplified how our beautifully diverse LGBTQIA+ community and its allies can unite, celebrate and advocate for equality, through art, performance and meaningful discussion. Sydney was the perfect backdrop to host this once in a lifetime, party with purpose."

– Kate Wickett, CEO WorldPride

**The festival gathered hundreds of thousands of LGBTQIA+ people and their allies, making community visible on a global stage.**

The 200-float parade up Oxford Street, the first post-pandemic, saw record attendance and participation, and was a visible signal of Sydney as an inclusive, vibrant and open city.

A suite of First Nations-led events signified a renewed intent to centre Australian First Nations voices when showcasing Sydney's culture and creativity on an international stage, the Marri Madung Butbut gathering space a key example.

**Sydney WorldPride invited attendees to dream of a better future and strengthened advocacy around marginalised communities.**

The Festival's landmark Humans Rights Conference brought together thousands of attendees from more than 60 countries and a range of LGBTQIA+ experiences to place a spotlight on progress and challenges in Asia Pacific. Lasting collaborations across communities, governments and business were established.

A focus on LGBTQIA+ inclusion across the region also saw a spotlight on the need for domestic investment. During Sydney WorldPride, the Federal Government announced a \$26 million investment in healthcare and medical research to support LGBTQIA+ people, and at the State level, a bipartisan commitment was made to end gay 'conversion' therapy.

**Sydney WorldPride amplified the contributions of community leaders, minority groups and small businesses.**

Pride Amplified provided an opportunity for businesses and organisations to independently deliver events under the Sydney WorldPride banner, which, alongside official events delivered by WorldPride and Mardi Gras, contributed \$168.6 million in total value added to the NSW economy.

The festival also amplified the voices of support for LGBTQIA+ communities, with survey results indicating a marked increase in attendees' acceptance of the LGBTQIA+ people in Sydney and understanding of the issues facing the Asia Pacific community. 3 in 4 attendees – both LGBTQIA+ people and allies – said they learned something new about a community under the LGBTQIA+ umbrella.

**The legacy of WorldPride is continued through advocacy and allyship.**

Tackling norms and assumptions about gender and sexuality is necessary to continue to drive positive outcomes for individuals and communities, and to ensure that the progress made at WorldPride is not lost.

.....  
"It's really important that we safeguard what we have achieved because if we lose them, it's going to take a long time to get back again."

– Robyn Kennedy, 1978er  
comments to Vogue Australia<sup>1</sup>

The connections made between advocates, allies and community members will continue to build on the legacy of WorldPride 2023, well after the Progress Shark is taken down and the glitter is packed away.



# Endnotes

## Scope and purpose of this report

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# Appendix 1: Data sources and survey details

## Data sources



### Financial and operational data of event organisers

Sydney WorldPride Limited and Sydney Gay and Lesbian Mardi Gras were asked to provide all revenue, expenditure and employment performance data specific to their planning and hosting roles for Sydney WorldPride 2023.

The event organisers were also responsible for providing final data on total event attendances, source market make up of attendees, and volunteer, event employee and artist participation figures.



### Attendee survey of spectators, artists and volunteers

Destination NSW was responsible for developing, scripting and hosting a detailed survey of attendees, in consultation with Deloitte, Sydney WorldPride, and Sydney Gay and Lesbian Mardi Gras. The survey was distributed via two mechanisms:

1. Intercept surveys at marquee free events, including Fair Day and the Parade. A total of 3,789 attendees were interviewed by this means.
2. An online survey of Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras membership bases. The online survey collected a total of 10,507 responses, of which 9,006 of respondents identified as primarily attendees, while 161 were artists, and 294 were volunteers.



### Surveys of Human Rights Conference attendees, Pride Amplified event organisers and local businesses

The surveys were developed, scripted and hosted by Deloitte, in consultation with Sydney WorldPride. In aggregate, Deloitte received 190 responses to the Human Rights Conference survey, 36 responses from Pride Amplified organisations, and 45 responses from local businesses.

**Table A.1:** Timing and information in data source

Data source	Timing	Information targeted
<b>Organiser financial and operational data</b>	Data received: Sydney Gay and Lesbian Mardi Gras - 22 May 2023 Sydney WorldPride – 6 June 2023	Operational revenues, operational expenditure by type and source of supplier, labour expenses, employee counts
<b>Attendee survey (n=10,507)</b>	Fieldwork: 17 February 2023 to 9 March 2023  Online: 17 March 2023 to 9 April 2023	Demographics, tickets and attendance, visitation and spending in Sydney and Newcastle, awareness and experience, social impact, volunteer and artist experiences, government involvement, partnerships
<b>Human Rights Conference Survey (n=190)</b>	Online: 31 March 2023 to 24 April 2023	Demographics, Scholar program, assistance, experience, goals, social impact
<b>Pride Amplified event organiser survey (n=36)</b>	Online: 21 March 2023 to 14 April 2023	Type of organisation, staff count, industry, postcode, number of events, type of event, attendees, volunteers artists, employees, attitudes, revenue, profit, employment
<b>Local businesses survey (n=45)</b>	Online: 28 March 2023 to 24 April 2023	Staff count, industry, postcode, actions, attitudes, revenue, employees, hours worked



# Appendix 2: Economic contribution analysis

Economic contribution studies are intended to quantify measures such as value added, exports, imports and employment associated with a given industry or firm, in a historical reference year. The economic contribution is a measure of the economic value of production by a firm or industry.

Value added is the most appropriate measure of the economic contribution - related to planning and hosting the Festival - to gross state product (GSP). Other measures, such as total revenue or gross output, may be easier to estimate than value added but they 'double count'. That is, they overstate the contribution of a company to economic activity because they include, for example, the value added by external firms supplying inputs or the value added by other industries.

The economic activity accounting framework is presented in Figure A1, showing how total revenue can be disaggregated into component parts in order to measure the economic contribution of an entity. The framework demonstrates the definition of value added being the difference between total revenue and intermediate inputs.

When calculating the gross operating surplus (GOS) for a typical for-profit firm or industry, income streams from government (such as transfers or production subsidies) are excluded as they are a transfer of public funds, not reflective of income generated by the activities of the firm or industry.

However, for non-profit organisations providing a service that generates external, non-use benefits that are not reflected in market prices, government transfers are included in the GOS calculation as they are fundamental to ongoing operations (as is the case for Sydney WorldPride and Sydney Gay and Lesbian Mardi Gras). Similarly, value added is typically calculated as GOS plus labour income net of subsidies.

### Direct and indirect contributions

The direct economic contribution is a representation of the flow from labour and capital within the sector of the economy in question.

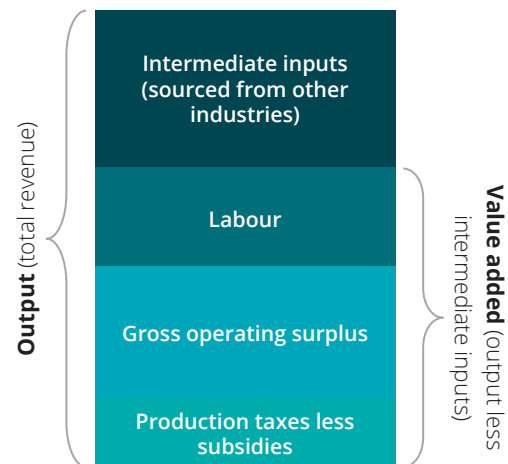
The indirect contribution is a measure of the demand for goods and services produced in other sectors as a result of demand generated by the sector in question. Estimation of the indirect economic contribution is undertaken in an input-output (IO) framework using Australian Bureau of Statistics input-output tables which report the inputs and outputs of specific sectors of the economy (ABS 2022).

IO tables are required to account for the intermediate flows between sectors. These tables measure the direct economic activity of every sector in the economy at the national level. Importantly, these tables allow intermediate inputs to be further broken down by source. These detailed intermediate flows can be used to derive the total change in economic activity for a given sector.

A widely used measure of the spill over of activity from one sector to another is captured by the ratio of the total to direct change in economic activity. The resulting estimate is typically referred to as 'the multiplier'. A multiplier greater than one implies some indirect activity, with higher multipliers indicating relatively larger indirect and total activity flowing from a given level of direct activity.

The total economic contribution to the economy is the sum of the direct and indirect economic contributions.

**Figure A.1:** Economic activity accounting framework



Source: Deloitte Access Economics

### Limitations of economic contribution studies

In a fundamental sense, economic contribution studies are simply historical accounting exercises. The analysis — as discussed in the report — relies on a national input-output table modelling framework and there are some limitations to this modelling framework. The analysis assumes that goods and services provided to the sector are produced by factors of production that are located completely within the state or region defined and that income flows do not leak to other states.

The IO framework and the derivation of the multipliers also assume that the relevant economic activity takes place within an unconstrained environment. That is, an increase in economic activity in one area of the economy does not increase prices and subsequently crowd out economic activity in another area of the economy. As a result, the modelled total and indirect contribution can be regarded as an upper-bound estimate of the contribution made by the supply of intermediate inputs.

# Appendix 3: Tourism contribution framework

Tourism contribution studies are intended to quantify measures such as value added and employment that results from tourism activity. The tourism contribution framework is based on the Tourism Satellite Account framework, an international approach to defining the tourism sector and related supplier industries.

## Measures of tourism activity

There are two measures of tourism activity presented in this report:

- **Visitor expenditure** is a measure of the aggregate price of goods paid by the consumer or a reflection of the price impact on visitors. It includes components that are not directly related to the industries producing the goods and services for tourism purposes, including imports, product taxes, and wholesale margins. It is necessary to adjust for these non-industry components of supply.
- **Value added** is the most appropriate measure of economic contribution as it ensures no 'double counting' of components of spend that should be allocated to other industries.

For example, taxes on products (such as the goods and services tax) are recognised as a component of the Government services industry, while wholesale margins should be allocated to the economic activity associated with the wholesale trade industry.

## Measuring induced tourism expenditure

Visiting attendee or artist activity was assumed to be attributable to Sydney WorldPride if the visitor travelled to Sydney specifically to attend the Festival or extended their stay in New South Wales to attend the Festival. This definitional approach to 'induced tourism' is consistent with contemporary best practice conventions for event based economic contribution measurement. The table below provides further detail on the assumptions that informed the induced tourism spend analysis contained in this report.

## Tourism Satellite Account Framework

The analysis used the Tourism Satellite Account (TSA) approach to measuring the economic contribution of induced tourism. The TSA framework is conceptually similar to and draws on the ABS IO tables to generate results. It is based on an international approach to defining the tourism sector and different tourism products and related industries depending on the extent to which they interact with tourists either directly or indirectly.

## Direct contribution of tourism

A direct contribution occurs where there is a direct relationship, both physical and economic, between the visitor and the producer of the good or service. Direct tourism sector output is essentially the amount of tourism consumption less net product taxes, wholesale and transport margins and imports.

In the case of retail goods purchased by visitors, only the retail margin contributes to direct tourism output, value added and Gross Regional Product. This is because it is deemed that only the retailer has a direct relationship with the visitor and is therefore part of the tourism industry.

Direct tourism gross value added shows only the 'value' which a producer adds to the raw material goods and services it purchases in the process of producing its own output. In summary, direct tourism value added is measured as the value of the output of tourism products by industries in a direct relationship with visitors less the value of the inputs used in producing these tourism products.

## Indirect contribution of tourism

The indirect effect of tourism consumption is a broad notion that covers upstream and supplier effects of tourism demand. Intermediate inputs represent those goods and services which support the supply of the tourism product – the cleaning services that are inputted to the hotel sector; the fuel that is inputted to the aviation industry; the fruit and vegetables that are inputted to the restaurant industry. Together with any upstream impacts, it is these flow-on effects which determine the tourism industry's indirect contribution.

The definition of direct and indirect are slightly different in tourism satellite accounting as direct is defined as activity involving a direct interaction with tourists. Accordingly, the ratio of direct and indirect activity differs from results using a standard IO approach. However, estimates of total value added and employment should be similar across the two approaches.

**Table A.2:** Induced spend parameters for attendees of Sydney WorldPride

	Local area	Intrastate	Interstate	Overseas
Attendances	732,484	64,631	183,121	96,946
Induced attendees (%)	N/A	71%	80%	71%
Average length of stay (# days)	N/A	4.64	6.87	10.81
Average spend per night (\$)	N/A	287	396	497
Extended stay attendees (%)	N/A	1.8%	1.8%	1.8%
Average stay extension (# days)	N/A	0.25	0.5	1.5

Sources: Attendee survey



## **Limitations of our Work**

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