



Economic Impact Assessment

Final Report – 2020 Tim Hortons Brier – Kingston, ON

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WHAT IS EI?

Economic Impact Assessment (EIA) studies measure the positive change in economic activity resulting from hosting an event in a specific city/town. There are three factors:

1. the spending of out-of-town visitors while they attend the event;
2. the expenditures of the event organizers in producing the event;
3. capital construction costs that are directly attributed to hosting the event.

An EI study calculates the amount of new money being spent in the host community as a direct result of hosting the event, and then the impact these new monies have on the regional, provincial and national economy as a whole.



HOW DO WE MEASURE EI?

The Canadian Sport Tourism Alliance (CSTA) has developed three tools called **steam^{2.0}**, **steam pro^{2.0}** and **fest pro** to predict, collect, measure and analyze event data across the three primary channels.

steam^{2.0} is designed specifically as a predictive model to determine the expected economic impact of hosting a sport event, while **steam pro^{2.0}** is utilized to generate the economic impact from actual spending data during the sport event itself.

CSTA's latest tool, called **fest pro**, is the sister model to **steam pro^{2.0}**. It measures the economic impact of non-sport events like festivals, exhibitions and fairs using actual spending data collected during the event.

Our economic impact services empower event organizers and host cities to accurately assess economic impact resulting from hosting a specific event in a specific location.

MODEL OUTPUTS

The elements (outputs of the model) used to measure the economic impacts are:

- Gross Domestic Product (GDP)
- Wages & Salaries
- Employment
- Taxes
- Industry Output

CSTA's **steam pro^{2.0}** measures the direct, indirect & induced effects for each of these elements.



RELIABILITY OF THE MODEL

In order to produce economic contribution assessments that are **robust** and **reliable**, the CSTA has partnered with the **Canadian Tourism Research Institute (CTRI)** at **The Conference Board of Canada**. The CTRI serves the travel and tourism industry in providing sound economic forecasts and models with timely and insightful interpretation of data specifically relevant to travel.

The findings in this report make use of the most current and most detailed input-output tables and multipliers available from Statistics Canada and leverages the credibility and robustness of sector specific tax data available from Statistics Canada's Government Revenues Attributable to Tourism (GRAT) report.



RELIABILITY OF THE DATA

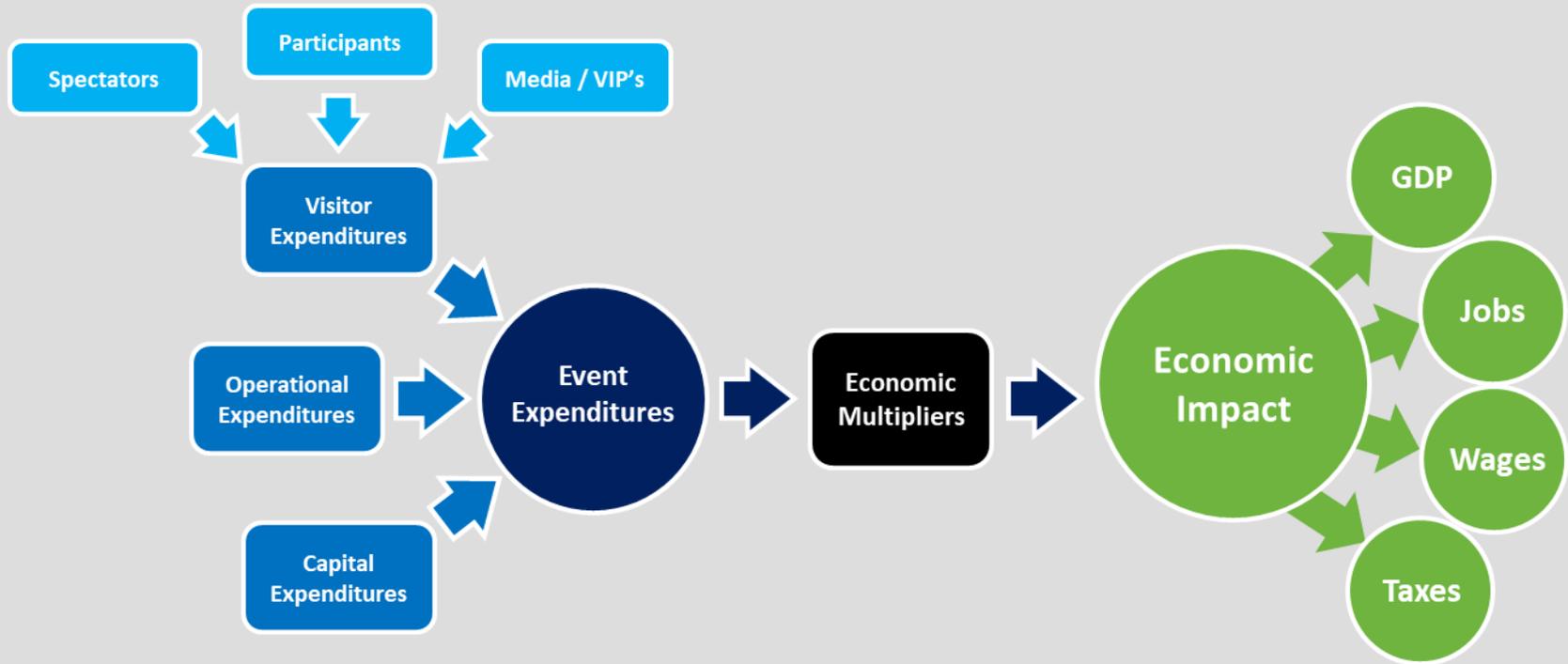
For this study, event organizers opted to engage the CSTA to manage the survey process to collect data onsite during four days of the event. Surveyors were recruited from St. Lawrence College, and supervised and trained by CSTA's Field Supervisor.

As a result of having a member of the CSTA Economic Impact Team on the ground during the event, the CSTA is able to validate the data records that were generated that underpins this analysis.

Additionally, based on the survey sample of 726 valid responses, the margin of error for results contained in this report is calculated at +/-3.7% at the 95% confidence level.

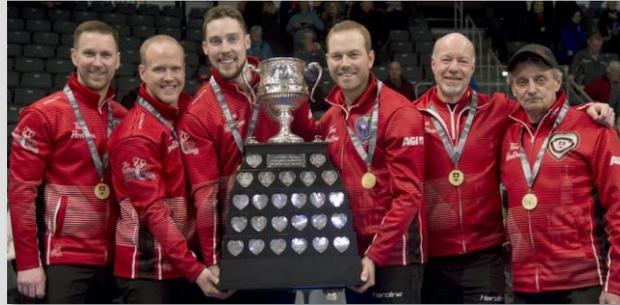


HOW IT WORKS



2020 TIM HORTONS BRIER

The 2020 Tim Hortons Brier, Canada's national men's curling championship, was held from February 29 - March 8 at Leon's Centre in Kingston, Ontario. In the final, Brad Gushue's team from Newfoundland and Labrador defeated Team Alberta, skipped by Brendan Bottcher, by a score of 7–3.



THE METHODOLOGY

The visitor statistics cited in this report were derived from an on-site intercept survey that was conducted over four (4) days of the event. The survey was developed by the CSTA specifically for this event and was administered by a team of surveyors on tablet computers running CSTA's survey software.

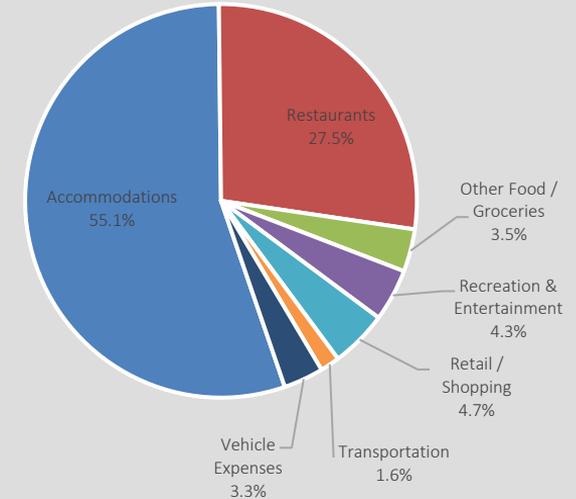
A total of **726** valid responses were collected during this event.

The survey included a variety of questions for the spectators with regards to their age, place of residence, days attended, etc., while respondents from out-of-town were asked about their length of stay in the local area, the amount of money spent in various categories while in the area, as well as the importance of this event in their decision to travel to Kingston.

VISITOR SPENDING

	Per Party	Overall
Accommodations	\$673.44	\$2,169,127
Restaurants	\$335.57	\$1,326,208
Other Food / Groceries	\$42.93	\$169,664
Recreation & Entertainment	\$52.39	\$207,051
Retail / Shopping	\$56.47	\$223,175
Transportation	\$20.40	\$80,623
Vehicle Expenses	\$40.47	\$159,942
Total	\$1,221.67	\$4,335,789

Aggregate visitor spending was just over **\$4.3 million**



VISITOR SPENDING – SCALED BY IMPORTANCE

	Per Party	Overall
Accommodations	\$631.01	\$2,032,472
Restaurants	\$314.43	\$1,242,657
Other Food / Groceries	\$40.23	\$158,975
Recreation & Entertainment	\$49.09	\$194,007
Retail / Shopping	\$52.91	\$209,115
Transportation	\$19.11	\$75,544
Vehicle Expenses	\$37.92	\$149,865
Total	\$1,144.70	\$4,062,634

Visitor spending directly attributable to this event was just under **\$4.1 million**

Visitors to the area were asked about the importance of the 2020 Tim Hortons Brier in their decision to travel to the area using a scale of 1-10 (with 1 meaning 'not at all important' and 10 meaning it was 'the primary reason for travel').

The results show that the 2020 Tim Hortons Brier was the primary driver for most respondents, with an average importance of **9.4/10**

OPERATIONAL EXPENDITURES

In hosting the 2020 Tim Hortons Brier, the event organizers spent just over **\$2.2 million** on various **goods and services** to ensure the successful operation of the event.



Operational Expenditures	
Salaries, Fees and Commissions	\$135,604
Marketing & Advertising Services	\$440,626
Professional Services	\$325,844
Insurance	\$35,640
Facility, Venue, and Office Rent	\$550,186
Communication	\$24,119
Other Supplies	\$130,794
Food and Beverages	\$96,077
Accommodations	\$161,740
Merchandise and Retail	\$53,548
Travel	\$79,171
Transportation and Storage	\$38,978
Other Expenses	\$134,659
Total	\$2,206,986

THE EI RESULTS

The combined spending of out-of-town participants, delegates, spectators and other people who visited Kingston for the event, in combination with the expenditures made by the organizers of the event, totaled over \$6.5 million, supporting almost \$11.4 million in overall economic activity in Ontario, including \$8.2 million of economic activity in the Kingston area.

These expenditures supported \$3.6 million in wages and salaries in the province through the support of 58 jobs, of which 42 jobs and \$2.3 million in wages and salaries were supported locally.

The total net economic activity (GDP) generated by the 2020 Tim Hortons Brier was:

- \$6.2 million for Canada as a whole
- \$5.8 million for the province of Ontario
- \$3.3 million for the city of Kingston

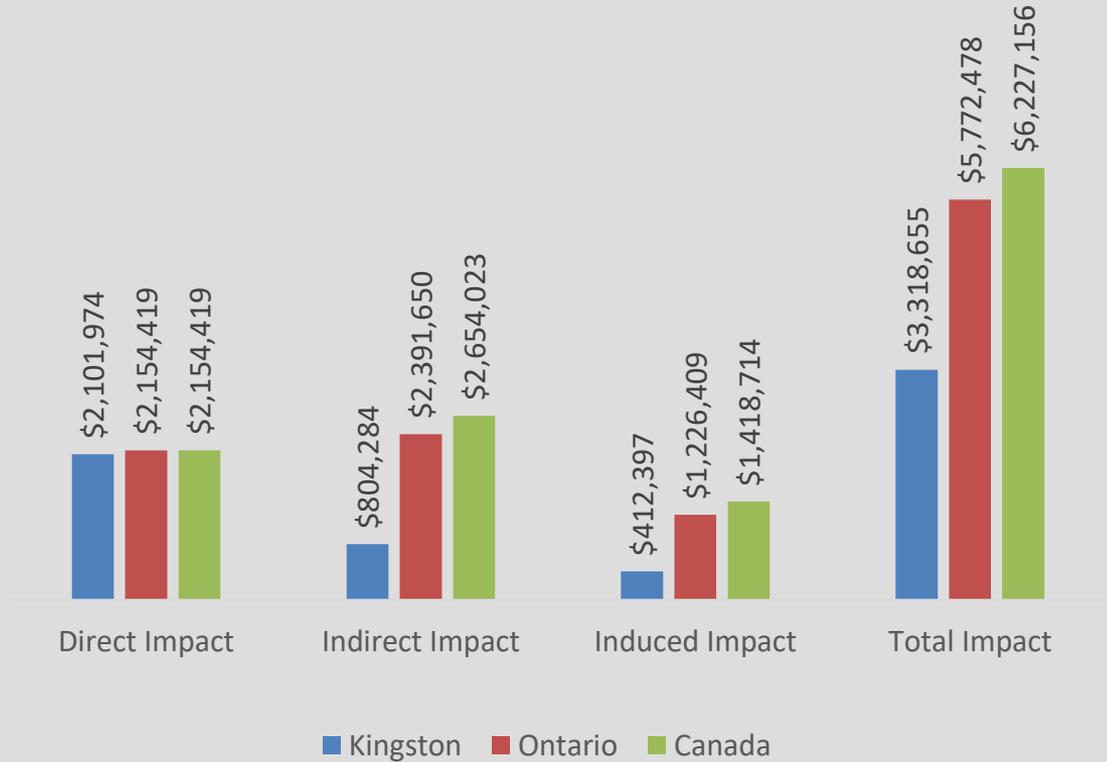
The 2020 Tim Hortons Brier supported tax revenues totaling just over \$2.0 million across Canada.

	Kingston	Ontario	Canada
Initial Expenditure	\$6,544,333	\$6,544,333	\$6,544,333
GDP	\$3,318,655	\$5,772,478	\$6,227,156
Wages & Salaries	\$2,339,760	\$3,625,059	\$3,856,162
Employment	42.3	57.9	61.4
Total Taxes	\$1,314,535	\$1,933,791	\$2,032,616
Federal	\$557,717	\$826,094	\$872,647
Provincial	\$668,431	\$933,353	\$973,885
Municipal	\$88,386	\$174,344	\$186,084
Industry Output	\$8,241,798	\$11,390,679	\$12,353,073

GROSS DOMESTIC PRODUCT

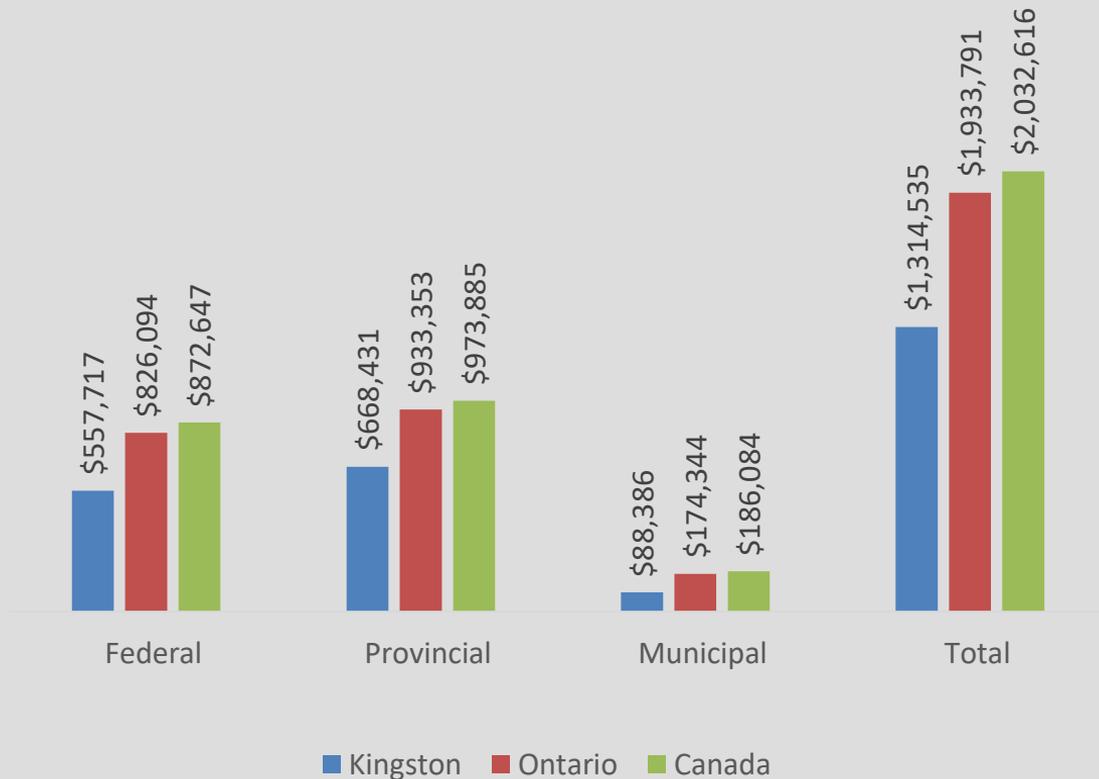
GPD (at basic prices)

The 2020 Tim Hortons Brier in Kingston contributed **\$6.23 million** in GDP to the Canadian economy through direct and spin-off impacts.



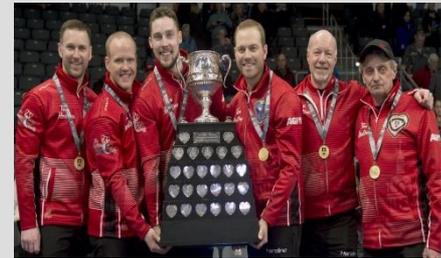
TAXES

The 2020 Tim Hortons Brier contributed **\$2.0 million** in federal, provincial, and local taxes through direct and spin-off effects throughout Canada.



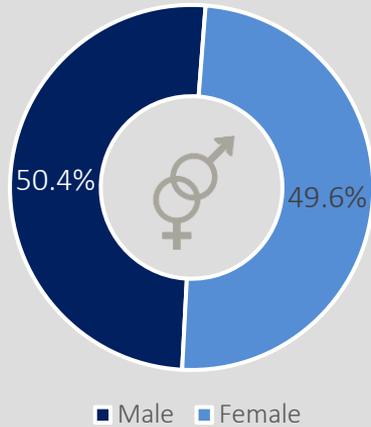
ADDITIONAL QUESTIONS

The following slides summarize the results from questions that were included as part of the survey, but were not all necessarily required for the economic impact analysis calculations.

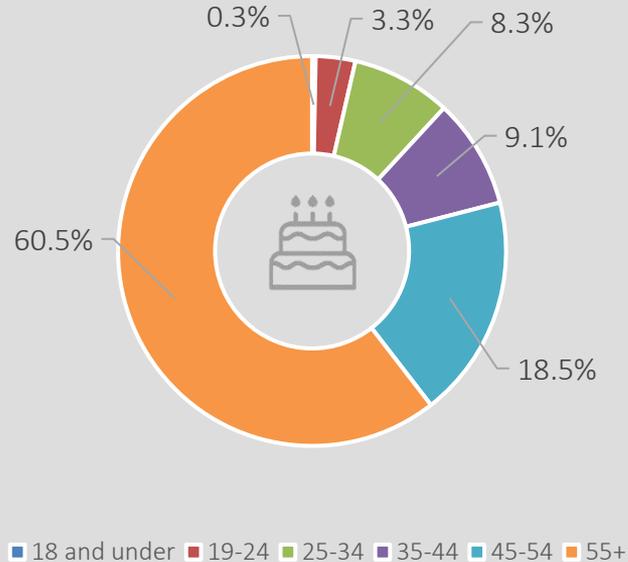


DEMOGRAPHICS

Gender



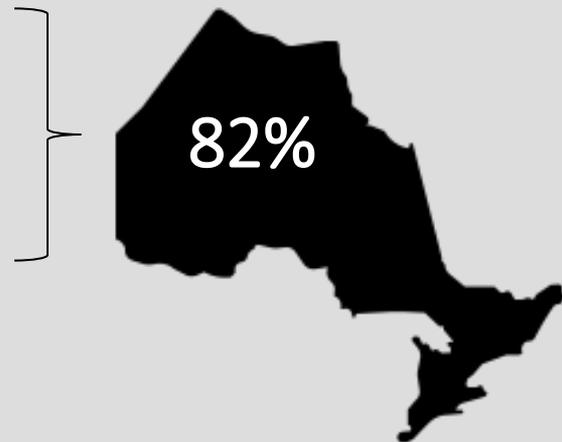
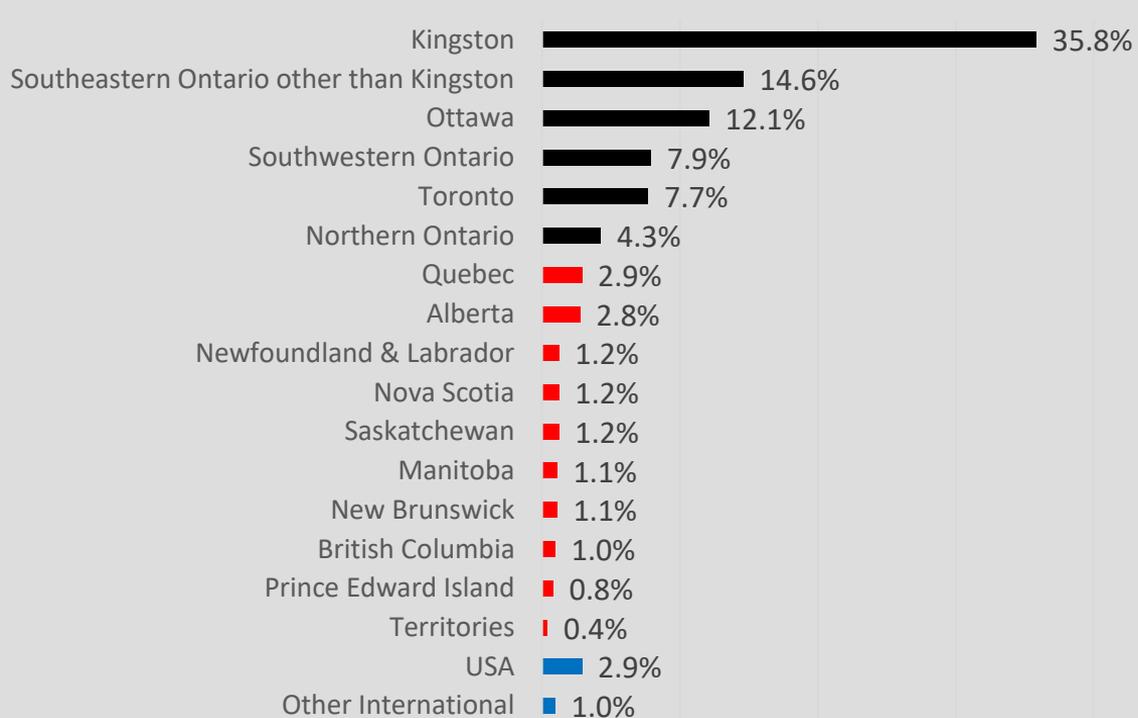
Age Range



Average Age = 56 years

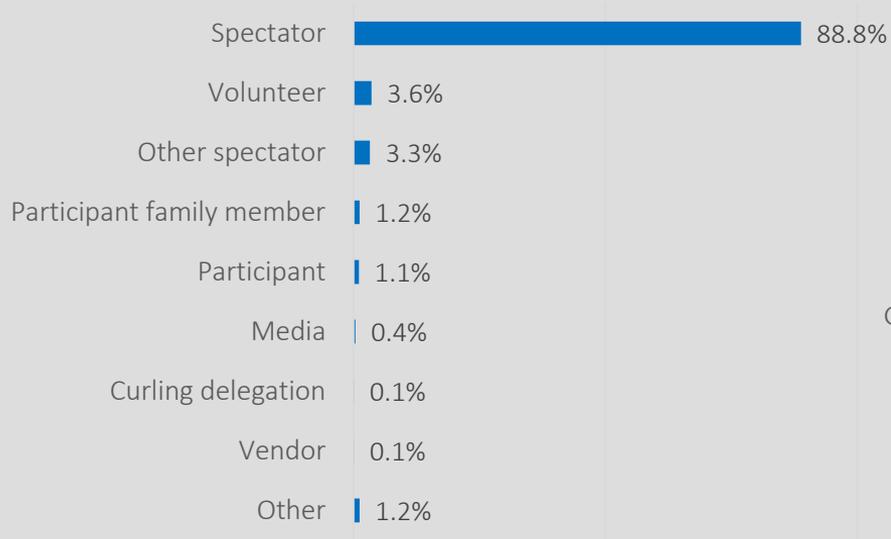
79% of attendees were aged 45 or older

PLACE OF RESIDENCE

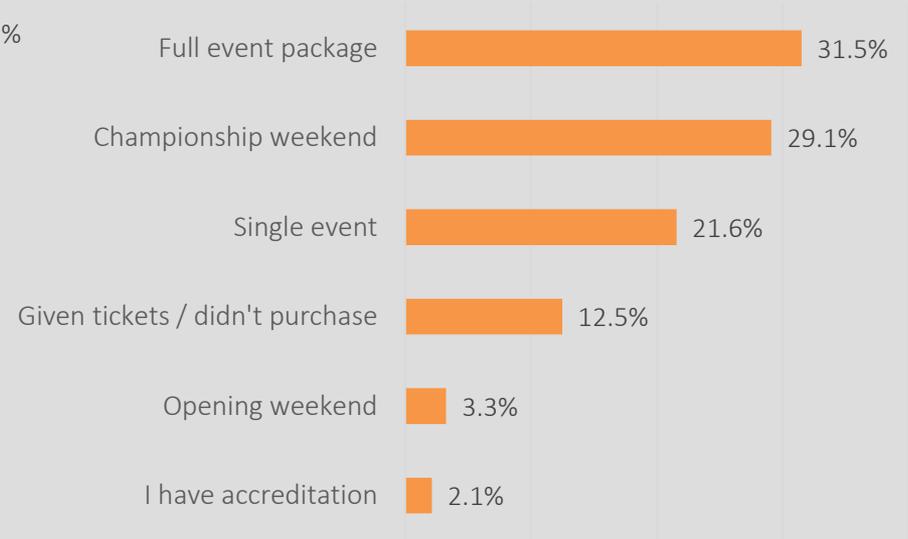


ATTENDANCE CHARACTERISTICS

Role at Event



Type of Ticket



ATTENDANCE CHARACTERISTICS

Average DAYS attended overall = 5.0

Average days
attended by
locals = 5.1

Average days
attended by
visitors = 4.9

Average DRAWS attended overall = 9.8

Average draws
attended by
locals = 9.2

Average draws
attended by
visitors = 10.1

Average Draws Attended by Ticket Type

Full Event	Championship Weekend	Opening Weekend	Single Event	Given Tickets
18	7	9	4	5

TRAVEL CHARACTERISTICS

82% of out-of-town attendees stayed overnight during their visit to Kingston



Of those staying overnight...

- 62% Stayed in a hotel
- 23% Stayed with friends/family
- 11% Used a short term rental
- 3% Made other arrangements

Average nights in Kingston = 4.9



Average travel party size = 2.2 people

IMPORTANT

72% of attendees indicated that this event was the sole reason for their visit to Kingston.

Overall, the importance of this event in influencing visitation to Kingston was 9.4/10.

SUMMARY | BY THE NUMBERS

2020 Tim Hortons Brier – Key Facts & Figures

\$6.5 Million of initial expenditures	\$4.1 Million of visitor spending attributable to event	42 local jobs supported by the event	\$11.4 Million overall economic activity in the province
8,900 out of town visitors* in Kingston	\$2.3 Million of wages and salaries supported locally	\$5.8 Million total boost to provincial GDP	\$2.0 Million in taxes supported across Canada

* Visitors derived from attendance figures provided by event organizers and combined with results from the survey.

QUESTIONS?

If you have any questions concerning the findings in this report, please contact:

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604.787.3605

If you would like to conduct another EI study using **steam pro^{2.0}** on a future event, please contact research@canadiansporttourism.com

