



Economic Impact Assessment

FINAL REPORT – 2019 SCOTTIES TOURNAMENT OF HEARTS | SYDNEY, NS
FEBRUARY 16-24, 2019

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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.



CSTA'S TOOL

The Canadian Sport Tourism Alliance (CSTA) has developed a tool called **steam pro^{2.0}** that collects, measures and analyzes data across the three primary channels.

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)
- Employment
- Taxes
- Industry Output
- Wages & Salaries

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



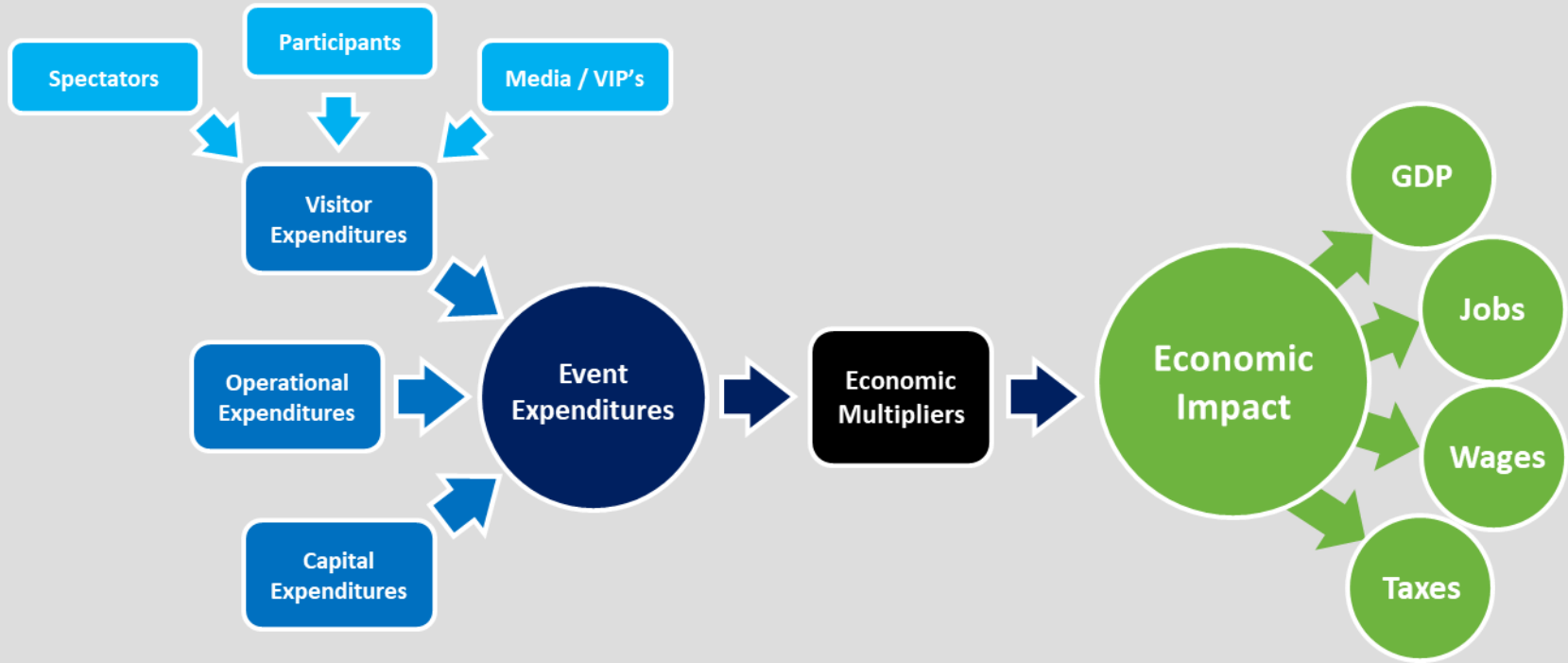
RELIABILITY OF THE MODEL

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.



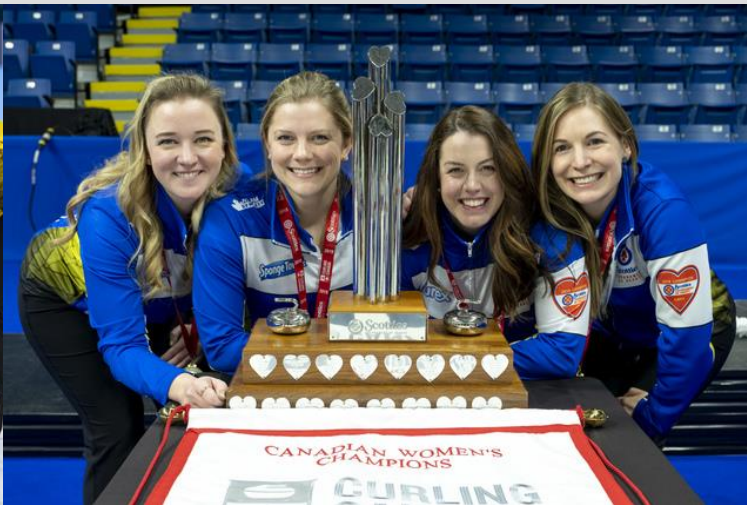
HOW IT WORKS





CURLING CANADA'S 2019 SCOTTIES TOURNAMENT OF HEARTS

The 2019 Scotties Tournament Of Hearts took place in Sydney Nova Scotia from February 16 to the 24, 2019 at Centre 200. Over the 9 days of competition, Sydney hosted sixteen teams (14-member provinces and territories, Team Canada and Wild Card) in two pools of eight. The 9-day event attracted nearly 14,000 unique spectators.



THE METHODOLOGY

The visitor statistics cited in this report were derived from an on-site intercept survey that was conducted during the **2019 Scotties Tournament Of Hearts** held in Sydney, Nova Scotia from February 16-24.

The survey was developed for **Curling Canada** by the CSTA, specifically for the **2019 Scotties Tournament Of Hearts** and was administered by a team of paid surveyors at key locations throughout the venue during the event. The survey teams were supervised onsite by CSTA.

A total of **632** valid responses were collected during this event.

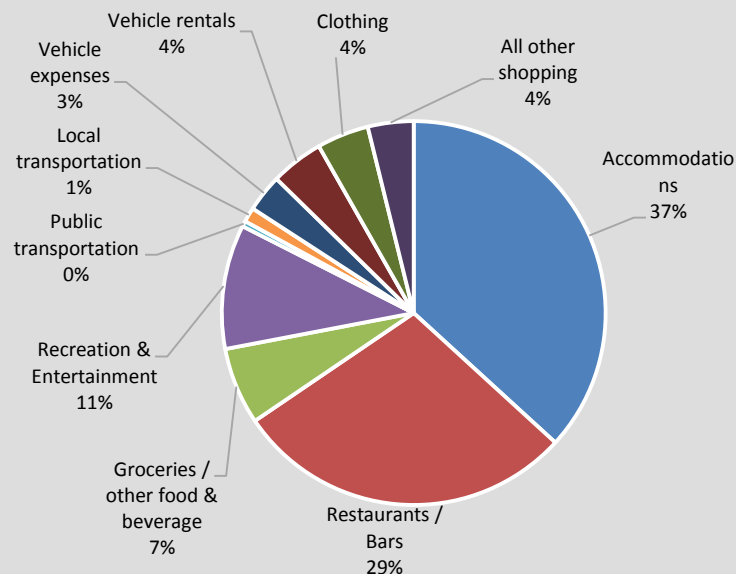
The survey included a variety of questions for the event attendees with regards to their place of residence, party size, and activities participated in while in town. Respondents from out-of-town were also asked about their length of stay in Sydney, the amount of money spent in various categories while in the city, as well as the importance of this event in their decision to travel to the area.

* Based on the survey sample and estimated total attendance, the margin of error for results contained in this report are +/-3.8% at the 95% confidence level.

VISITOR SPENDING

	Per Party	Overall
Accommodations	\$612.47	\$1,418,801
Restaurants / Bars	\$478.08	\$1,107,482
Groceries / other food & beverage	\$108.05	\$250,300
Recreation & Entertainment	\$174.42	\$404,044
Public transportation	\$7.80	\$18,075
Local transportation	\$20.38	\$47,214
Vehicle expenses	\$52.60	\$121,852
Vehicle rentals	\$74.02	\$171,465
Clothing	\$72.86	\$168,775
All other shopping	\$64.14	\$148,580
TOTAL	\$1,664.81	\$3,856,588

Aggregate visitor spending was nearly **\$3.9 million**



* Visitor spending was calculated based on the survey results from people staying overnight in For McMurray and extrapolated to the overall attendance figures provided by Sydney Sport Tourism.

VISITOR SPENDING – SCALED BY IMPORTANCE

	Per Party	Overall
Accommodations	\$590.86	\$1,368,755
Restaurants / Bars	\$461.21	\$1,068,416
Groceries / other food & beverage	\$104.24	\$241,471
Recreation & Entertainment	\$168.26	\$389,791
Public transportation	\$7.53	\$17,438
Local transportation	\$19.66	\$45,548
Vehicle expenses	\$50.75	\$117,554
Vehicle rentals	\$71.41	\$165,417
Clothing	\$70.29	\$162,821
All other shopping	\$61.88	\$143,339
Total	\$1,606.08	\$3,720,551

Visitor spending directly attributable to this event was just over **\$3.7 million**



Visitors were asked about the importance of the 2019 Scotties Tournament Of Hearts in their decision to travel to Sydney. The results show that this event was the main driver for 83% respondents and indicated an average importance of 9.6/10.

OPERATIONAL & CAPITAL EXPENDITURES

In hosting the 2019 Scotties Tournament Of Hearts, the event organizers spent approximately **\$1.2 million** on various **goods and services** to ensure the successful operation of the event.

Operational & Capital Expenditures	
Salaries, Fees and Commissions	\$331,000
Advertising Services	\$395,000
Professional Services	\$40,000
Insurance	\$8,800
Rent	\$90,000
Other Services	\$35,000
Communication	\$29,000
Other Supplies	\$15,000
Food and Beverages	\$69,000
Accommodation	\$130,000
Personal Travel	\$30,000
Transportation and Storage	\$25,000
Total Operational Expense	\$1,197,800

THE EI RESULTS

The combined spending of out-of-town spectators, participants, media, sponsors, and other people who visited Sydney for the 2019 Scotties Tournament Of Hearts, in combination with the expenditures made by the organizers of the event, totaled \$5.2 million, supporting \$7.83 million in economic activity (industry output) in Nova Scotia, including \$6.94 million of economic activity in Sydney.

These expenditures supported \$2.6 million in wages and salaries in the province and \$2.3 million in wages and salaries were supported in Sydney. The total net economic activity (GDP) generated by the 2019 Scotties Tournament Of Hearts was:

- \$4.95 million for Canada as a whole
- \$4.1 million for the Province of Nova Scotia
- \$3.4 million for Sydney

The 2019 Scotties Tournament Of Hearts supported tax revenues totaling \$1.5 million across Canada.

	Sydney	Nova Scotia	Canada
Initial Expenditure	\$5,206,611	\$5,206,611	\$5,206,611
GDP	\$3,406,271	\$4,068,943	\$4,945,821
Wages & Salaries	\$2,259,602	\$2,586,176	\$3,073,009
Employment	54.5	59.7	66.6
Total Taxes	\$1,281,939	\$1,442,862	\$1,635,931
<i>Federal</i>	<i>\$477,303</i>	<i>\$538,903</i>	<i>\$618,995</i>
<i>Provincial</i>	<i>\$718,359</i>	<i>\$797,548</i>	<i>\$887,148</i>
<i>Municipal</i>	<i>\$86,277</i>	<i>\$106,411</i>	<i>\$129,788</i>
Industry Output	\$6,936,604	\$7,826,151	\$9,648,037

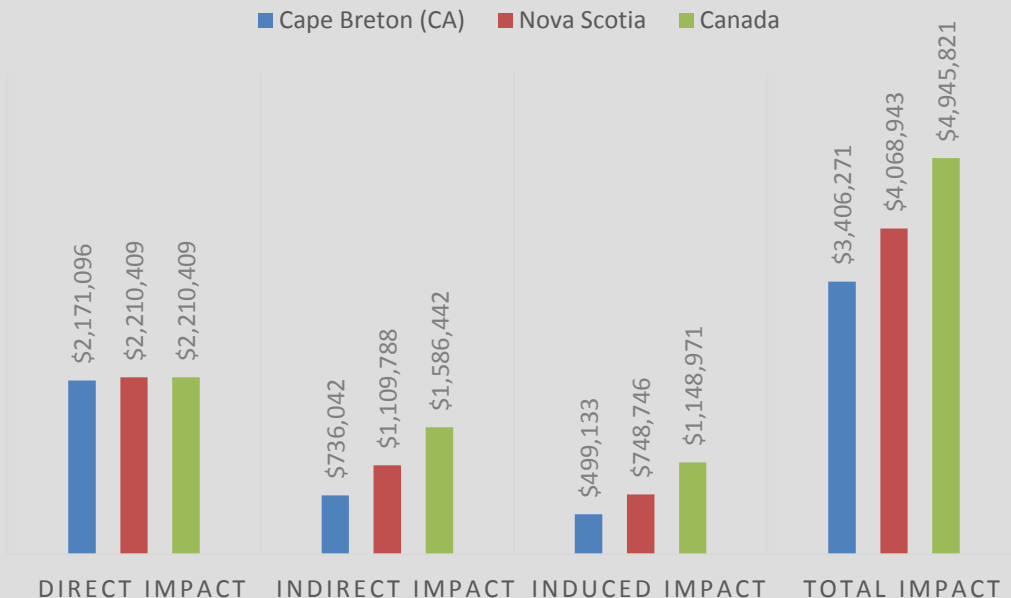
GROSS DOMESTIC PRODUCT

GPD (at basic prices)

The 2019 Scotties Tournament Of Hearts contributed \$4.9 in GDP to the Canadian economy through direct and spin-off impacts.

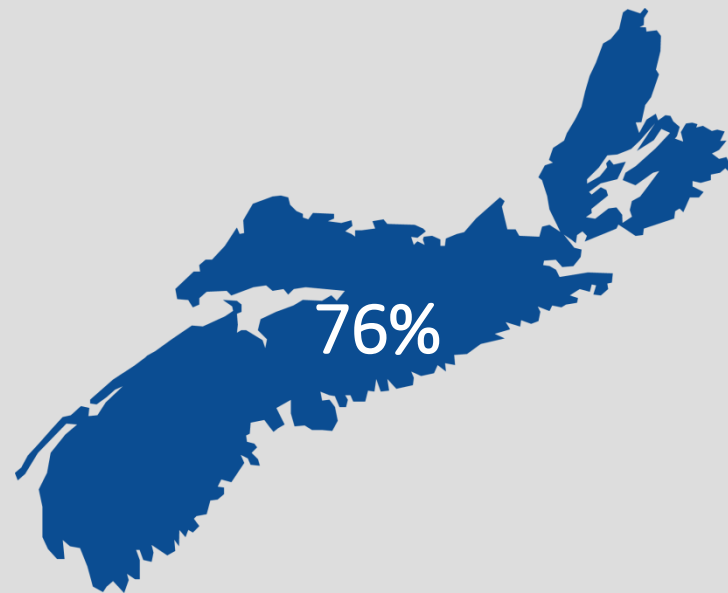
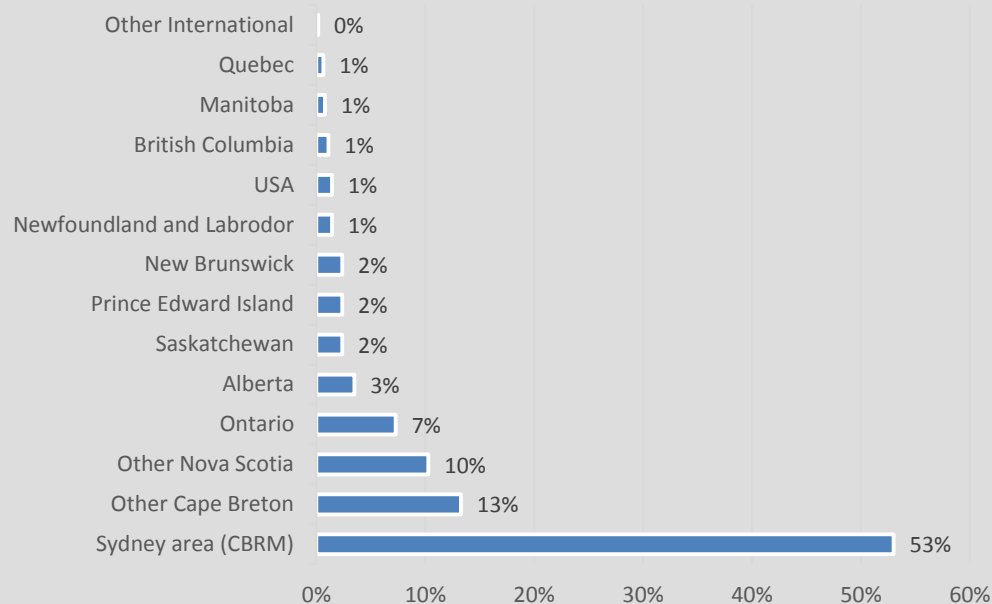
Of this, \$3.4 (96%) accrued in the Sydney area, while 82% of the total GDP impact remained in the province of Nova Scotia.

GROSS DOMESTIC PRODUCT (AT BASIC PRICES)



PLACE OF RESIDENCE

Where do you live?



TRAVEL CHARACTERISTICS

98.7% of out-of-town attendees stayed overnight during their visit to Sydney

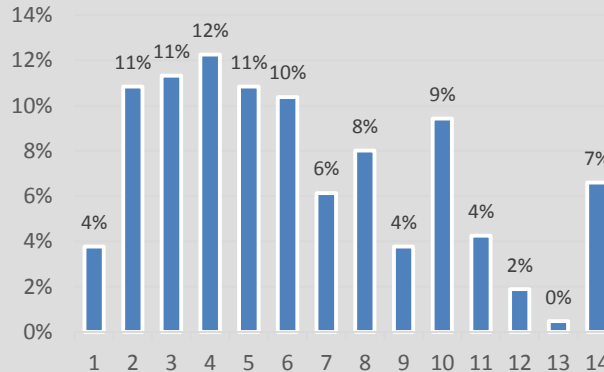


Of those staying overnight...

- 53% Said they live here / local
- 22% Stayed in Hotels / Motels
- 12% Stayed with friends / family
- 11% were making day trips / not staying overnight
- 3% Used short term rentals
- 0.2% Made Other accommodations

Average number of nights in Sydney = 6.2

In total, how many nights will you be spending in the Sydney area?



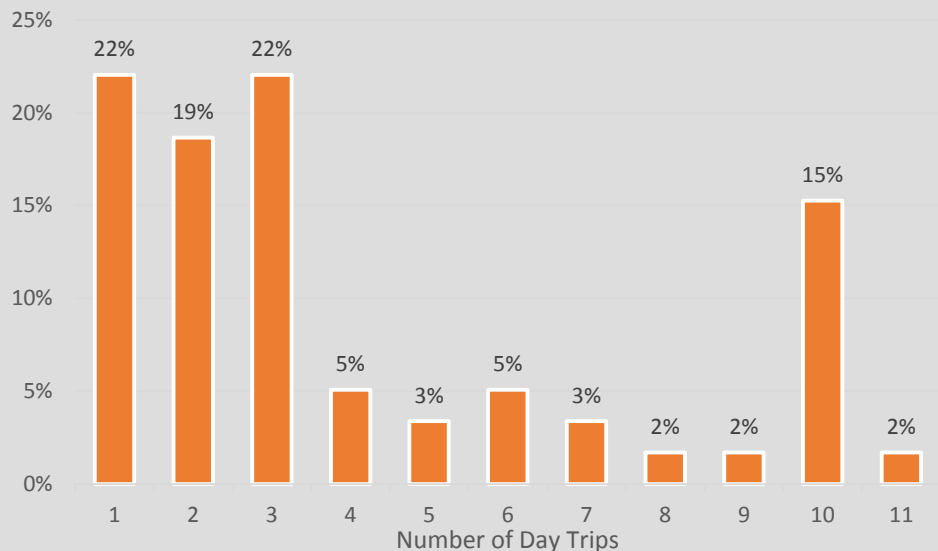
Average travel party (same household) size = 2.1 people



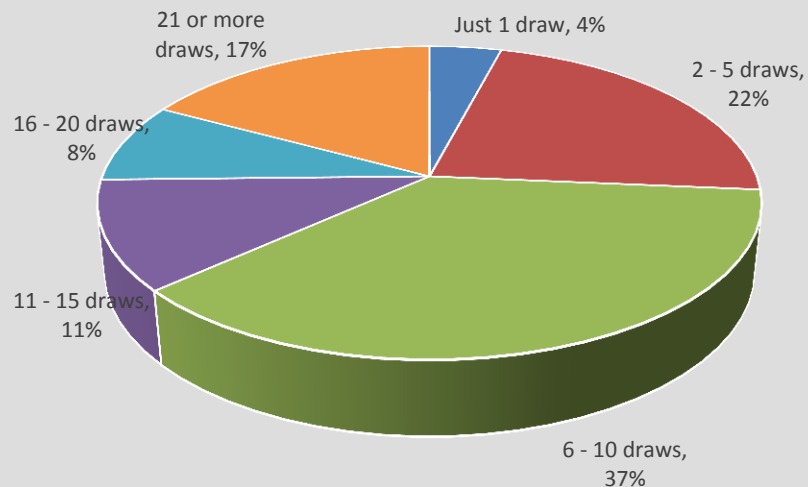
86% said their one-way daily commute to Sydney was less than 200km

TRAVEL CHARACTERISTICS

In total, how many day trips will you be making to Sydney for this event?



How many draws are you planning on attending during this tournament?



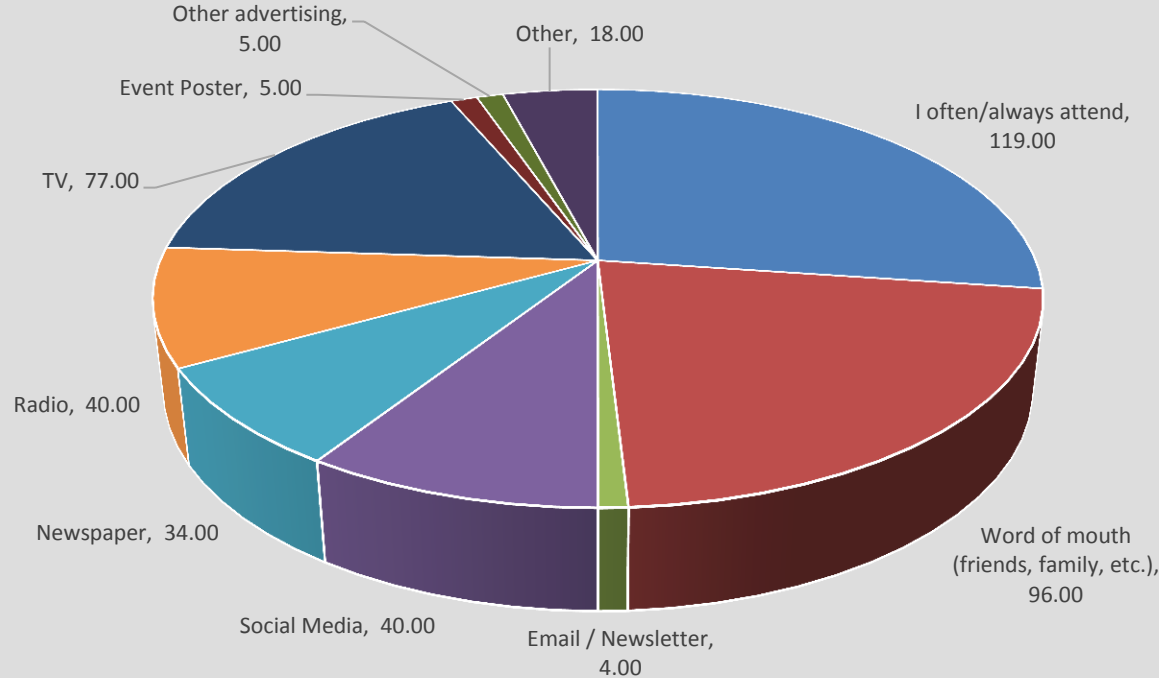
ADDITIONAL QUESTIONS

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.



AWARENESS & MOTIVATION

How did you find out about this year's
Scotties Tournament of Hearts?

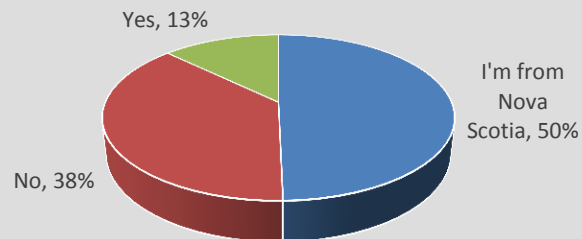


83% of attendees indicated that this event was the sole reason for their visit to Sydney.

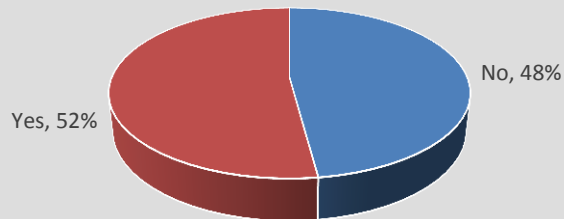
Overall, the importance of this event in influencing visitation to Sydney was 9.6/10.

VISITOR EXPERIENCE

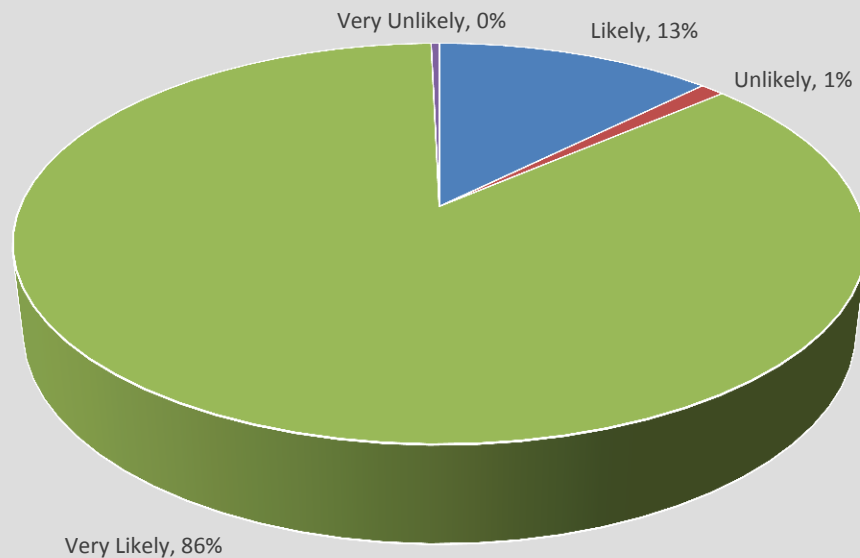
Is this your first visit to NS?



Is this your first visit to Sydney?



Based on your experience here in Sydney, how likely are you to return to Sydney again in the future?



SUMMARY | BY THE NUMBERS

2019 Scotties Tournament of Hearts - Sydney – Key Facts & Figures				
\$5,206,611 Of initial expenditures	\$4,008,813 Of visitor spending attributed to event	\$6,936,604 Overall economic activity in Sydney & Area	\$7,826,151 Overall economic activity in Nova Scotia	\$9,648,037 Overall economic activity in Canada
5,042 Out of town visitors	\$2,259,602 Of wages and salaries supported locally	\$4,068,943 Total boost to provincial GDP	\$1,635,931 In taxes supported across Canada	55 Local jobs supported

QUESTIONS?

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

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

