

ECONOMIC IMPACT ASSESSMENT GARTH BROOKS CONCERT - REGINA

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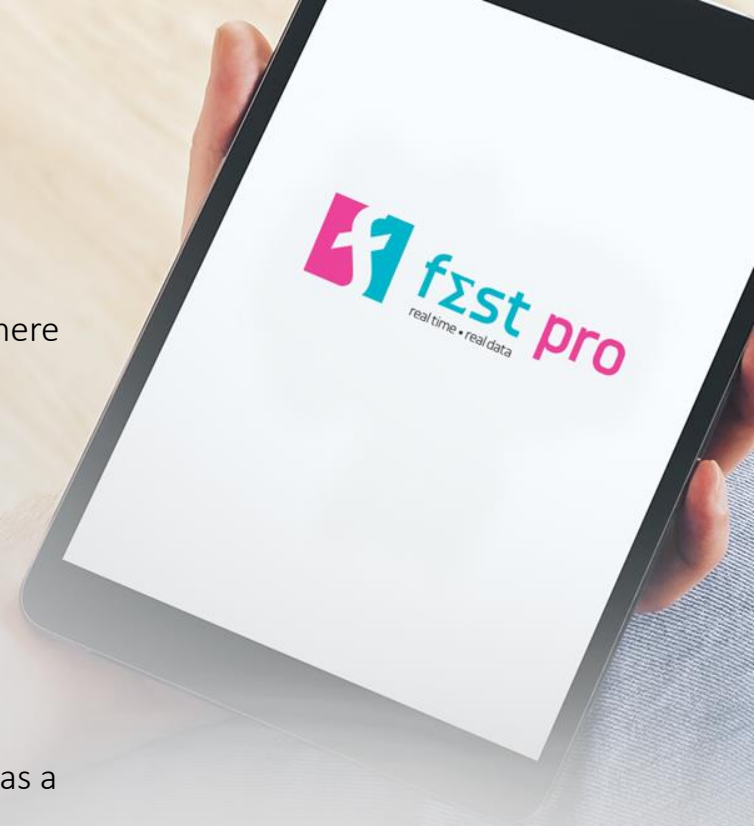
Date: August 30, 2019

WHAT IS EIA?

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:

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

An EI study calculates the amount of new spending in the host community as a direct result of hosting the event, and the impact of this spending on the regional, provincial and national economy as a whole.



CSTA'S TOOL – FEST PRO

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

Our economic impact services empower event organizers of festivals, fairs, exhibitions, etc. and cities who host these types of events to accurately assess the economic impact resulting from hosting a specific non-sport event in a specific location in Canada.

Developed in 2019, **fest pro** is the sister model of CSTA's **steam pro^{2.0}** tool that is used to measure economic impact of sport events in a specific location in Canada. CSTA uses **fest pro** specifically for EI studies on non-sport events.



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 **fest pro** model measures the direct, indirect & induced effects for each of these elements.



RELIABILITY OF THE MODEL

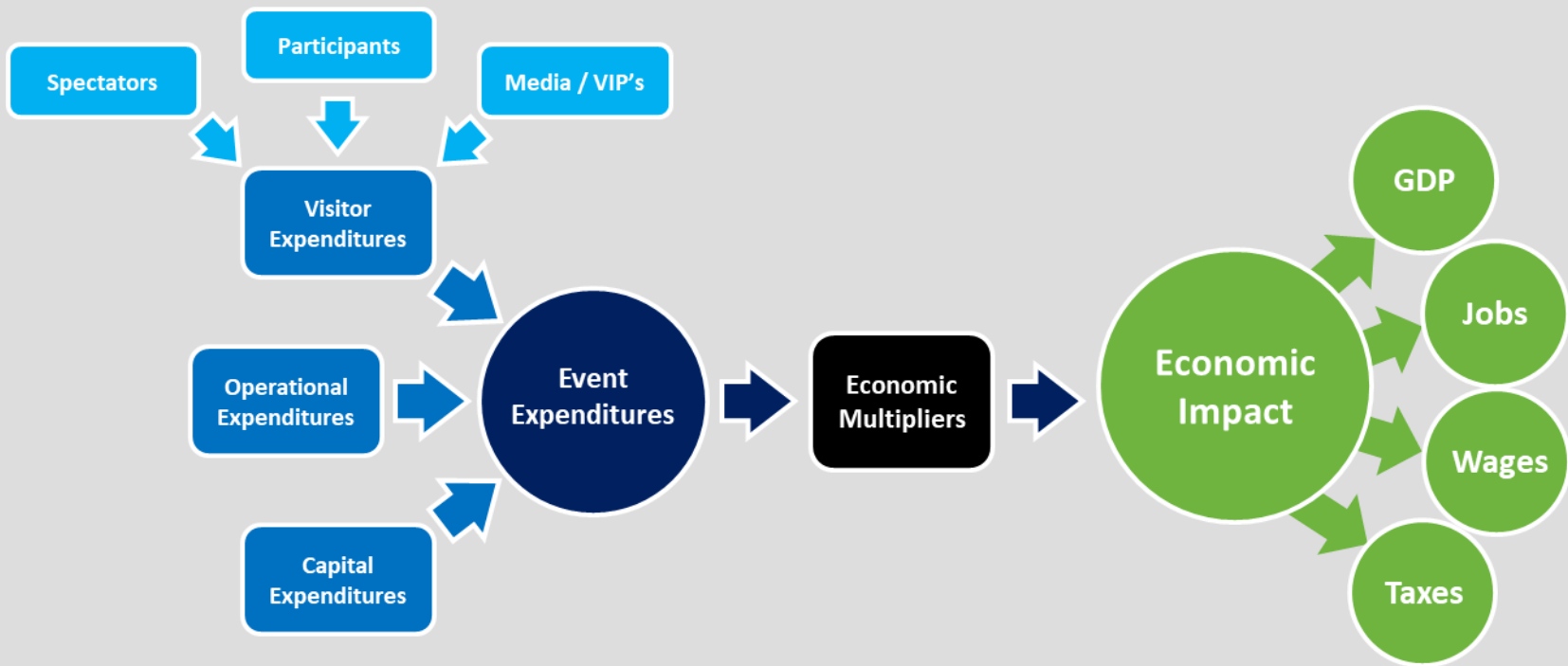
In order to produce economic contribution assessments that are robust and reliable, the CSTA has partnered with the **Canadian Tourism Research Institute (CTRI)** at **The Conference Board of Canada**. The CTRI serves the travel and tourism industry in providing sound economic forecasts and models with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

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.

The CSTA collaborates with **The Conference Board of Canada** annually to ensure the **fest pro** model is calibrated to provide the most accurate and current results in the industry.



HOW IT WORKS



RELIABILITY OF THE DATA

For this study, event organizers opted to utilize their ticket database to distribute an email with an invitation (and incentive) to participate in an online survey following the two concerts. The survey was developed by the CSTA specifically for this event, was programmed by CSTA's field supervisor, with a link embedded in the email directing respondents to the survey utilizing CSTA's survey software.

As a result of not having a member of the CSTA Economic Impact Team on the ground during the event, or involved in the online delivery, the CSTA is not able to validate the data records that were generated that underpins this analysis.

The visitor statistics cited in this report were derived from a total of **2,998** valid responses that were collected during this study. Based on the sample size, the results contained in this report have a margin of error of +/-1.8 at the 95% confidence level.



GARTH BROOKS CONCERT

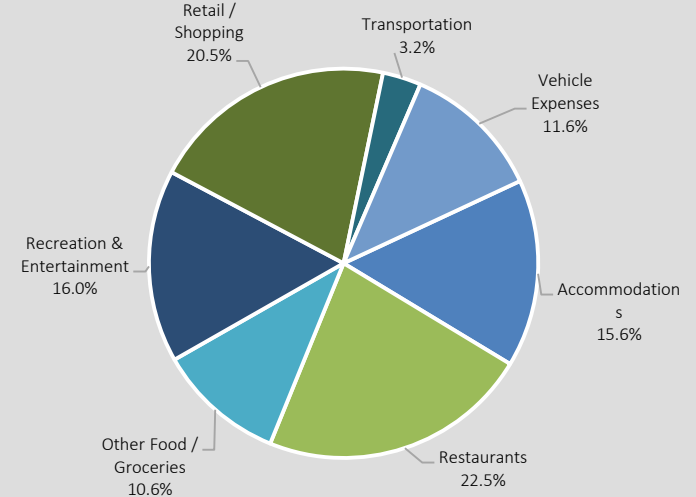
Country music superstar Garth Brooks played two shows at Regina's Mosaic Stadium, his only Canadian tour dates, on Friday, Aug. 9 and Saturday, Aug. 10, 2019.



VISITOR SPENDING

Category	Per Party	Overall
Accommodations	\$110.18	\$904,751
Restaurants	\$159.54	\$2,386,293
Other Food / Groceries	\$74.80	\$1,118,809
Recreation & Entertainment	\$113.42	\$1,696,461
Retail / Shopping	\$145.04	\$2,169,412
Transportation	\$22.47	\$336,091
Vehicle Expenses	\$82.32	\$1,231,288
Total	\$707.77	\$9,843,104

Aggregate visitor spending was just over **\$9.8 million**



VISITOR SPENDING – SCALED BY IMPORTANCE

Category	Per Party	Overall
Accommodations	\$104.67	\$859,514
Restaurants	\$151.56	\$2,266,978
Other Food / Groceries	\$71.06	\$1,062,868
Recreation & Entertainment	\$107.75	\$1,611,638
Retail / Shopping	\$137.79	\$2,060,941
Transportation	\$21.35	\$319,287
Vehicle Expenses	\$78.20	\$1,169,723
Total	\$672.38	\$9,350,949

Visitor spending directly attributable to this event was just under **\$9.4 million**

Visitors to Regina were asked about the importance of the Garth Brooks Concert in their decision to travel to Regina 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 Garth Brooks Concert was the primary driver for most respondents, with an average importance of **9.5 / 10**

THE EI RESULTS

The combined spending of out-of-town participants, crew, spectators and other people who visited Regina for the event, in combination with the expenditures made by the organizers of the event, totaled \$13.2 million, supporting over \$18.7 million in total economic activity in Saskatchewan, including \$16.3 million of total economic activity in the Regina area.

These expenditures supported \$6.0 million in wages and salaries in the province through the support of 88 jobs, of which 73 jobs and \$5.0 million in wages and salaries were supported locally.

The total net economic activity (GDP) generated by the Garth Brooks Concert was:

- \$11.5 million for Canada as a whole
- \$9.3 million for the province of Saskatchewan
- \$7.3 million for the city of Regina

The Garth Brooks Concert supported tax revenues totaling nearly \$3.2 million across Canada.

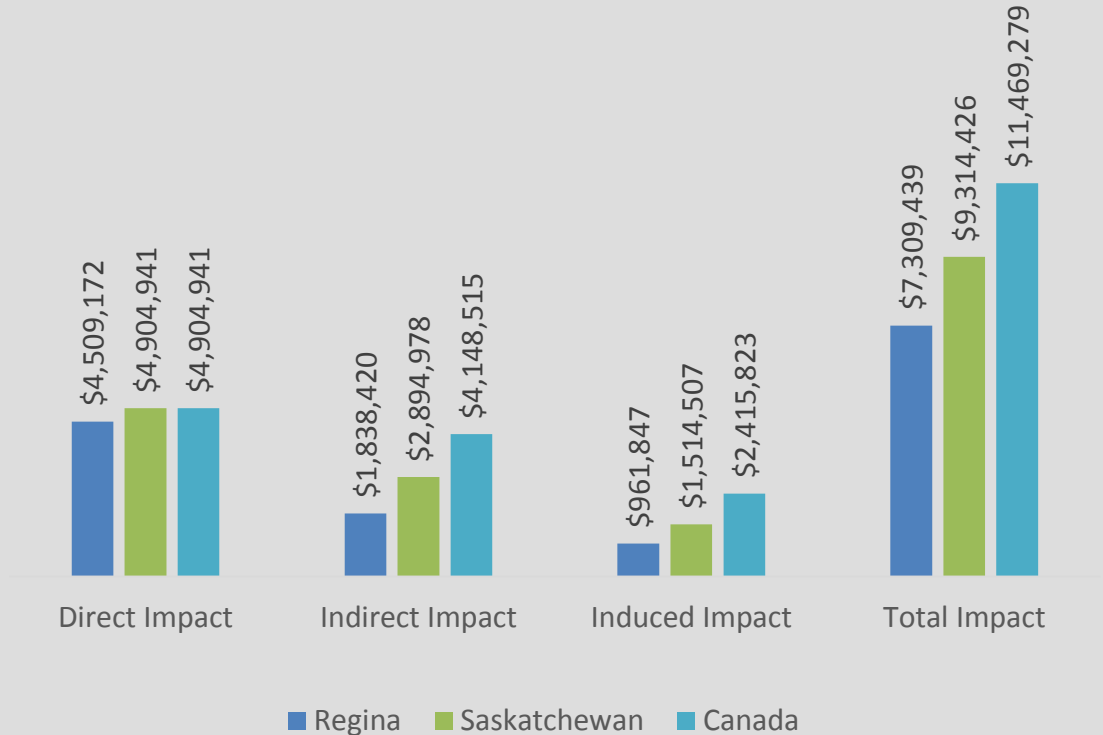
	Regina	Saskatchewan	Canada
Initial Expenditure	\$13,197,348	\$13,197,348	\$13,197,348
GDP	\$7,309,439	\$9,314,426	\$11,469,279
Wages & Salaries	\$5,028,533	\$6,033,065	\$7,196,264
Employment	73.3	87.7	103.7
Total Taxes	\$2,323,919	\$2,739,704	\$3,170,047
Federal	\$1,134,011	\$1,329,527	\$1,544,468
Provincial	\$1,026,096	\$1,187,380	\$1,347,926
Municipal	\$163,812	\$222,797	\$277,652
Industry Output	\$16,308,700	\$18,726,675	\$23,020,726



GROSS DOMESTIC PRODUCT

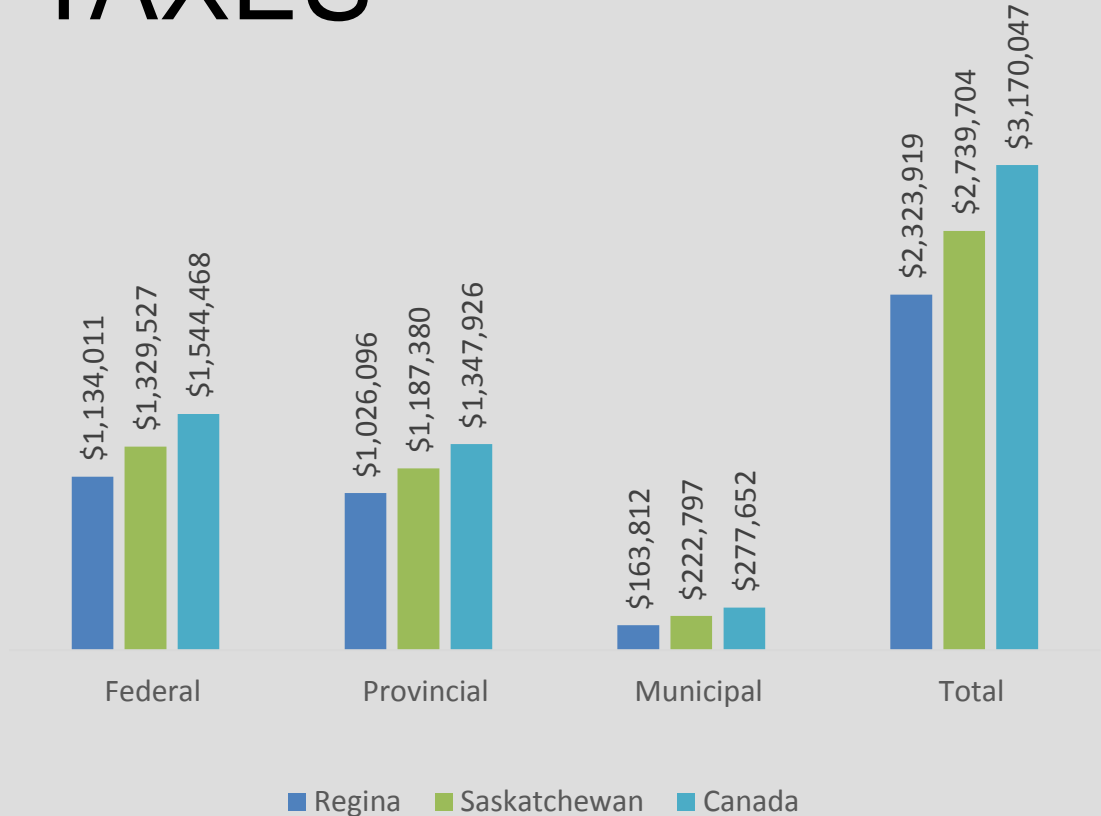
GPD (at basic prices)

The **Garth Brooks Concert** in Regina contributed **\$11.5 million** in GDP to the Canadian economy through direct and spin-off impacts.



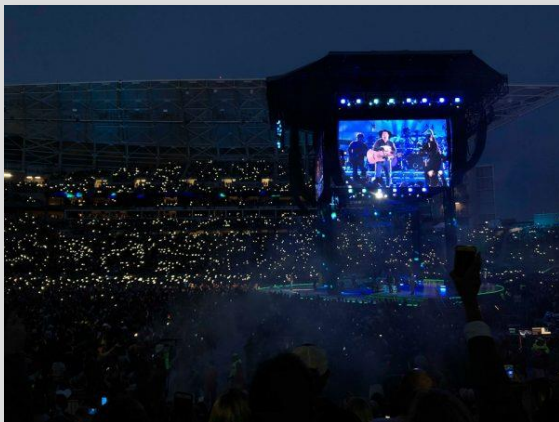
TAXES

The **Garth Brooks Concert** contributed nearly **\$3.2 million** in federal, provincial, and local taxes through direct and spin-off effects throughout Canada.



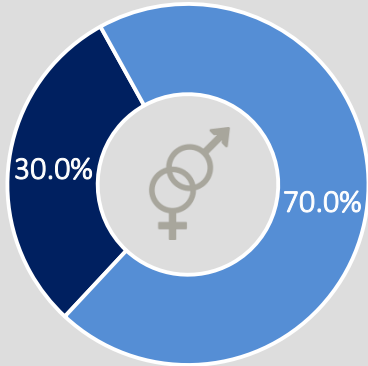
ADDITIONAL QUESTIONS

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.



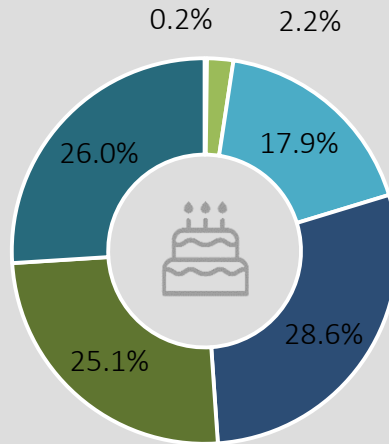
DEMOGRAPHICS

Gender



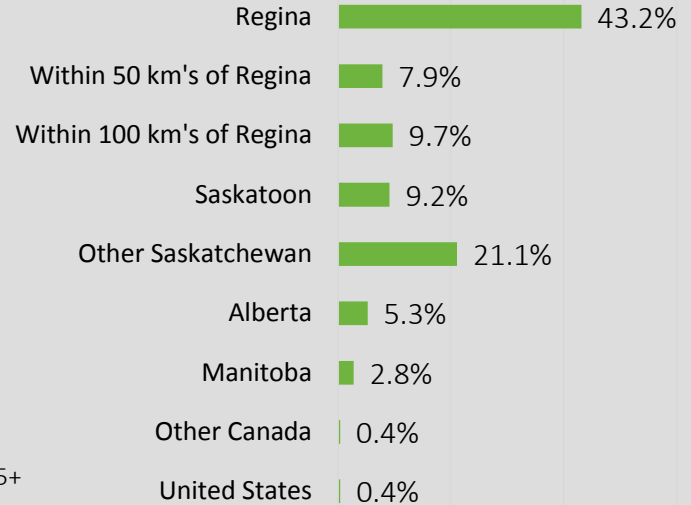
■ Male ■ Female

Age Range



■ 18 and under ■ 19-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

Place of Residence



Average Age = 46.7 years

TRAVEL CHARACTERISTICS

55% of out-of-town attendees stayed overnight during their visit to Regina



Of those staying overnight...

- 57% Stayed in a hotel
- 35% Stayed with friends/family
- 3% Used a short term rental
- 6% Made other arrangements

Average travel party size (for spending purposes) = 3.0 people



Average nights in Regina = 1.3

IMPORTANT

80% of attendees indicated that this event was the sole reason for their visit to Regina.

Overall, the importance of this event in influencing visitation to Regina was 9.5 / 10.

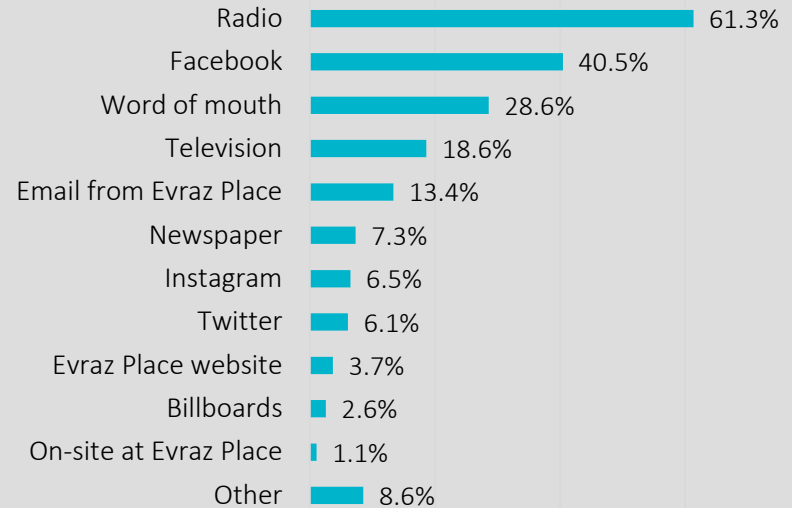
EVENT CHARACTERISTICS

93%

Likely or very likely to recommend an event at Mosaic Stadium

Very Likely	75.4%
Somewhat Likely	17.8%
Not Sure	3.7%
Somewhat Unlikely	1.7%
Not Likely	1.3%

Sources Learned About Event



EVENT SATISFACTION

	Parking	Guest Services	Cleanliness of Stadium	Concessions	Merchandise Stands	Acoustics of Venue
Completely Satisfied	19.1%	41.3%	67.0%	41.4%	30.4%	57.9%
Somewhat Satisfied	13.6%	23.2%	24.7%	30.4%	19.6%	28.9%
Neutral	41.1%	28.7%	5.0%	14.6%	40.8%	4.3%
Somewhat Dissatisfied	13.0%	3.8%	1.9%	10.4%	6.6%	6.6%
Completely Dissatisfied	13.1%	3.0%	1.4%	3.2%	2.7%	2.3%

Percent Satisfied

33%

65%

92%

72%

50%

87%

SUMMARY | BY THE NUMBERS

Garth Brooks Concert – Key Facts & Figures

\$13.2 Million of initial expenditures	\$9.35 Million of visitor spending attributable to event	73 local jobs supported by the event	\$18.7 Million overall economic activity in the province
45,132 out of town visitors* in Regina	\$5.0 Million of wages and salaries supported locally	\$9.3 Million total boost to provincial GDP	\$3.2 Million in taxes supported across Canada

* Visitors derived from attendance figures provided by Regina Exhibition Association Ltd. 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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If you would like to conduct an EI study using **steam pro^{2.0}** on a future sport event or **fest pro** for an upcoming festival, fair or convention, please contact research@canadiansporttourism.com

