



Economic Impact Assessment

Final Report – Tim Hortons Brier – Lethbridge, AB

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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(s);
2. The expenditures of the event organizers in producing the event(s);
3. Capital construction costs that are directly attributed to hosting the event(s).

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



HOW DO WE MEASURE EI?

Sport Tourism Canada (formerly the Canadian Sport Tourism Alliance) has developed three tools called **STEAM^{2.0}**, **STEAMPRO^{2.0}** and **FESTPRO** 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 **STEAMPRO^{2.0}** is utilized to generate the economic impact from actual spending data during the sport event itself.

STC's latest tool, called **FESTPRO**, is the sister model to **STEAMPRO^{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.

RELIABILITY OF THE MODEL

In order to produce economic contribution assessments that are robust and reliable, STC 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 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 Conference Board
of Canada



Statistics
Canada



Government Revenues
Attributable to Tourism

MODEL OUTPUTS

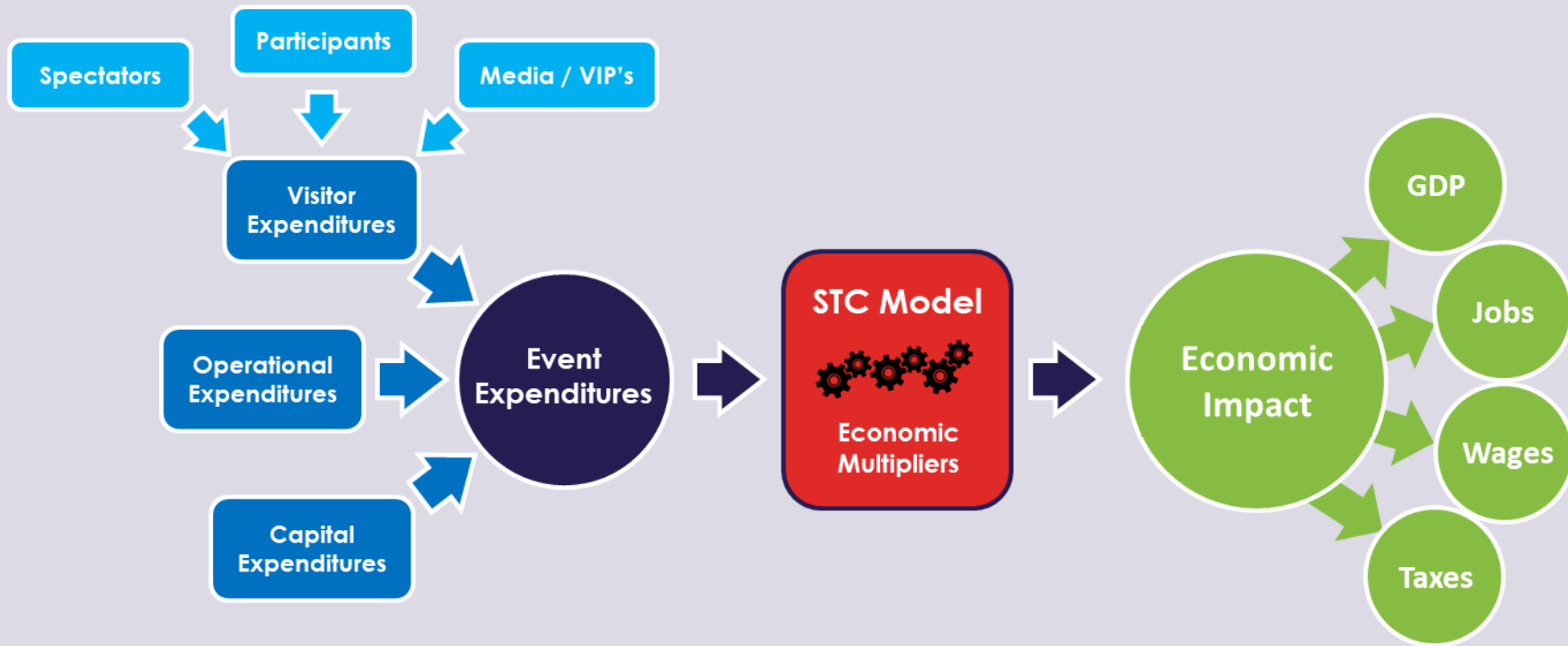
The elements (outputs of the model) used to measure the economic impacts are:

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

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



HOW IT WORKS



RELIABILITY OF THE DATA

For this study, Tourism Lethbridge utilized Sport Tourism Canada staff to manage the survey process and collect data onsite during four (4) days of the event. Surveyors were volunteers from the Lethbridge Sport Council and Tourism Lethbridge and were trained and supervised by a Sport Tourism Canada Field Supervisor.

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

Additionally, based on the survey sample of **769** valid responses, the margin of error for results contained in this report is calculated at **+/-3.6%** at the 95% confidence level.



METHODOLOGY

The visitor statistics cited in this report were derived from an on-site survey that was conducted over the last four (4) days of the event. The survey was developed by STC specifically for this event and was administered three ways onsite 1) by a team of surveyors intercepting spectators, 2) a series of self-complete kiosks set up on the concourse, and 3) through the use of a QR code provided to allow respondents to complete at their leisure.

A total of **769** 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 Lethbridge.



THE EVENT



THE EVENT

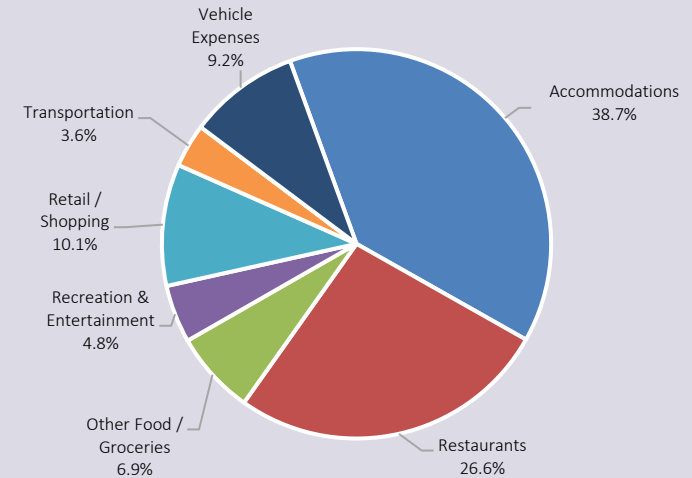
The Tim Hortons Brier is the annual Canadian Men's curling championship, sanctioned by Curling Canada. The 2022 edition of the tournament was held in Lethbridge, Alberta at the ENMAX Centre from March 4-13, 2022. In the final, the defending Olympic bronze medallist Brad Gushue Wild Card #1 team from Newfoundland and Labrador defeated Alberta, skipped by Kevin Koe. It was Gushue's fourth career Brier title, and the team did it shorthanded, as one team member missed the playoffs due to testing positive for COVID-19.



SPECTATOR SPENDING

	Per Party	Overall
Accommodations	\$472.73	\$3,811,044
Restaurants	\$325.39	\$2,879,494
Other Food / Groceries	\$84.79	\$750,324
Recreation & Entertainment	\$59.22	\$524,083
Retail / Shopping	\$123.66	\$1,094,336
Transportation	\$44.32	\$392,239
Vehicle Expenses	\$112.66	\$996,976
Total	\$1,222.77	\$10,448,496

Aggregate spectator spending was nearly **\$10.5 million**



** Spectator spending shown here is scaled by "importance of this event" on respondents reason for being in Lethbridge (9.3/10 or 93%).*

OTHER VISITOR SPENDING

	Overall
Accommodations	\$81,080
Restaurants	\$55,474
Other Food / Groceries	\$46,535
Recreation & Entertainment	\$57,946
Retail / Shopping	\$91,304
Transportation	\$8,963
Vehicle Expenses	\$13,395
Total	\$354,697

Other visitor spending totalled just under **\$355,000** and was calculated from the other constituent groups (i.e. participants, support staff, officials, media, VIP's, and production personnel).

Aggregate visitor spending was just over \$10.8 million

OPERATIONAL EXPENDITURES

To ensure the successful operation and staging of this event, the combined purchase of **goods and services** by Curling Canada and the Organizing Committee in Lethbridge totaled just under **\$2.4 million**.



Operational Expenses
\$2,359,723



These operational expenditures include, but are not limited to salaries & fees, facility rental, marketing and advertising services, professional services, communication, security, food and beverage, accommodations, merchandise, travel, transportation, and storage.

THE EI RESULTS

The combined spending of out-of-town participants, staff, spectators, media, and other people who visited Lethbridge for the Tim Hortons Brier, in combination with the expenditures made by the event organizers, totalled just under \$13.2 million, supporting just under \$19.7 million in overall economic activity in Alberta, including almost \$16.8 million of economic activity in the Lethbridge area.

These expenditures supported \$6.2 million in wages and salaries in the province through the support of 137 jobs, of which 128 jobs and \$5.4 million in wages and salaries were supported locally.

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

- \$12.6 million for Canada as a whole
- \$10.3 million for the province of Alberta
- \$8.4 million for the city of Lethbridge

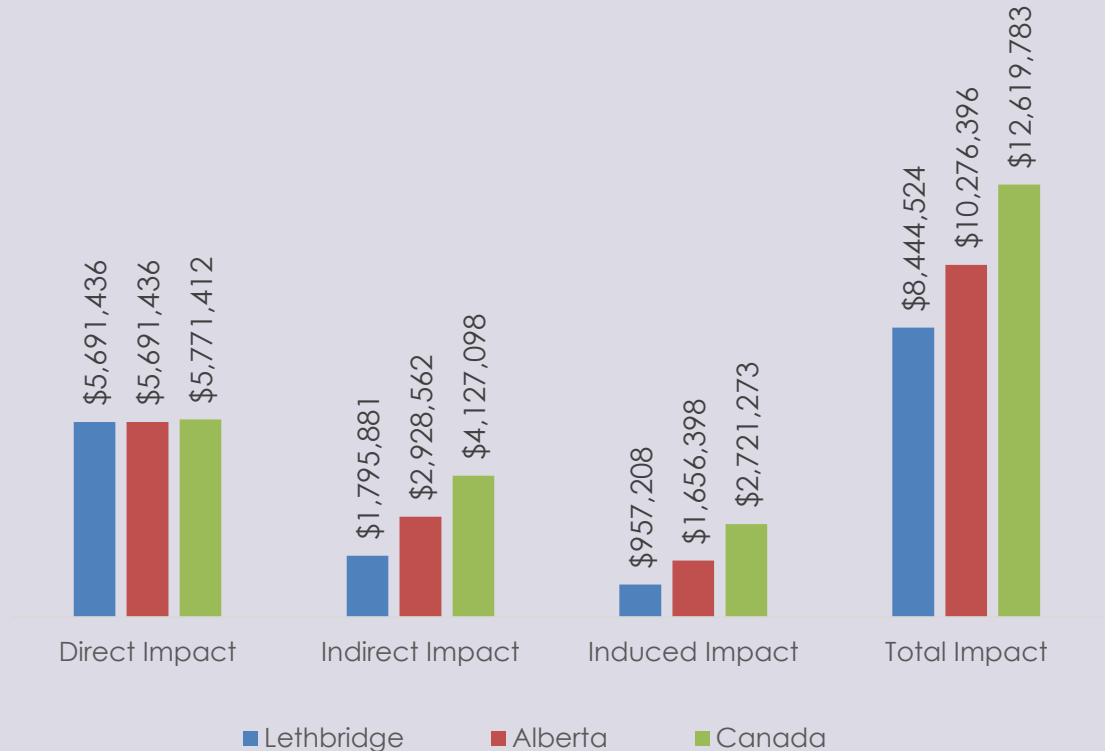
The 2022 Tim Hortons Brier supported tax revenues totaling \$3.9 million across Canada.

	Lethbridge	Alberta	Canada
Initial Expenditure	\$13,162,913	\$13,162,913	\$13,162,913
GDP	\$8,444,524	\$10,276,396	\$12,619,783
Wages & Salaries	\$5,354,358	\$6,158,207	\$7,470,950
Employment	128.4	137.0	160.0
Total Taxes	\$2,657,634	\$3,142,252	\$3,891,595
Federal	\$1,466,208	\$1,716,514	\$2,055,648
Provincial	\$949,040	\$1,136,102	\$1,471,368
Municipal	\$242,386	\$289,636	\$364,579
Industry Output	\$16,768,868	\$19,659,953	\$24,813,853

GROSS DOMESTIC PRODUCT

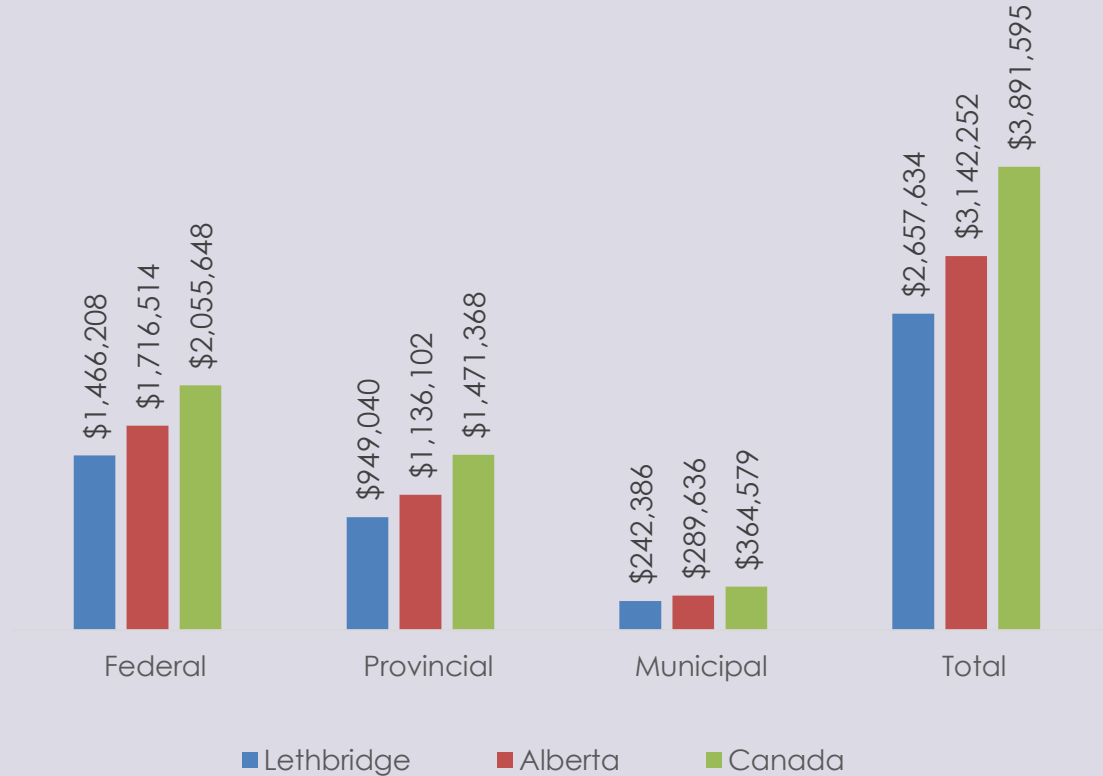
GDP (at basic prices)

By hosting the **Tim Hortons Brier in Lethbridge** contributed just over **\$12.6 million** in GDP to the Canadian economy through direct and spin-off impacts.



TAXES

The Tim Hortons Brier hosted in **Lethbridge** contributed just under **\$3.9 million** in federal, provincial, and local **taxes** through direct and spin-off effects throughout Canada.



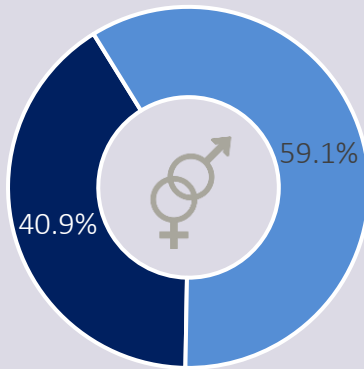
ADDITIONAL QUESTIONS

The following pages 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.



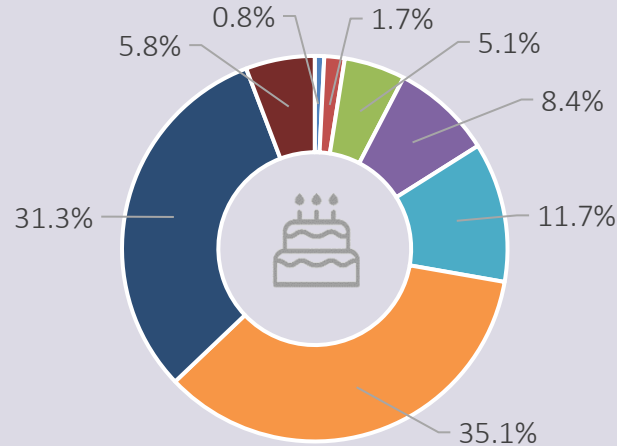
DEMOGRAPHICS

Gender



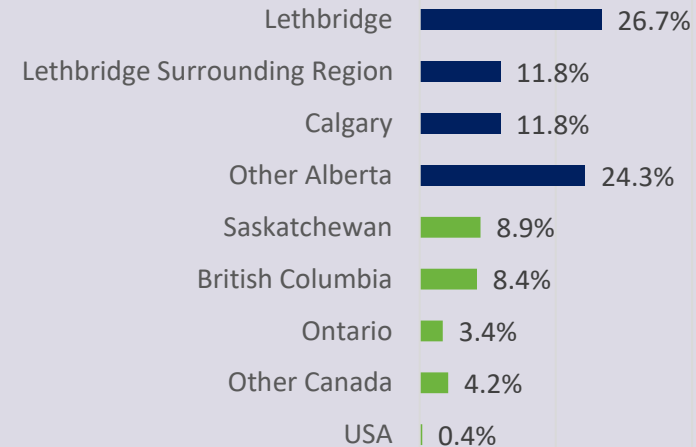
■ Man ■ Woman

Age Range



■ 18 or under ■ 19 - 24 ■ 25 - 34 ■ 35 - 44
 ■ 45 - 54 ■ 55 - 64 ■ 65 - 74 ■ 75+

Place of Residence



Alberta = 74.7%

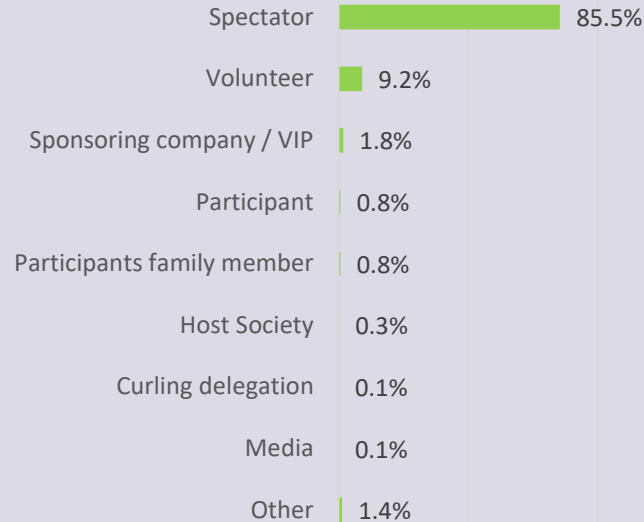
ATTENDANCE CHARACTERISTICS

Average days at
event = **5.3**

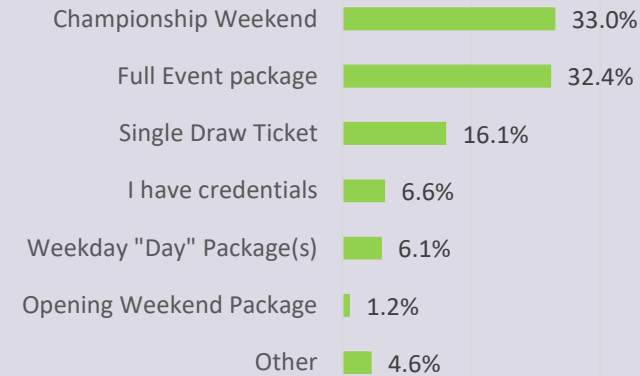
Average # of draws
attended = **10.8**



Role at event



Type of ticket



TRAVEL CHARACTERISTICS

91% of out-of-town attendees stayed overnight during their visit to Lethbridge



Of those staying overnight...

- **67.6%** Stayed in a hotel
- **19.6%** Stayed with friends/family
- **11.3%** Used a short term rental
- **1.5%** Made other arrangements

Average nights in Lethbridge = **5.4**



Average travel party size = **2.1** people

IMPORTANT

75% of attendees indicated that this event was the sole reason for their visit to Lethbridge.

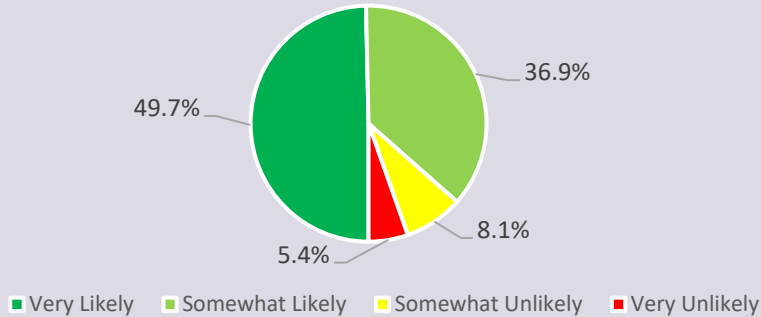
Overall, the importance of this event in influencing visitation to Lethbridge was **9.3/10**.



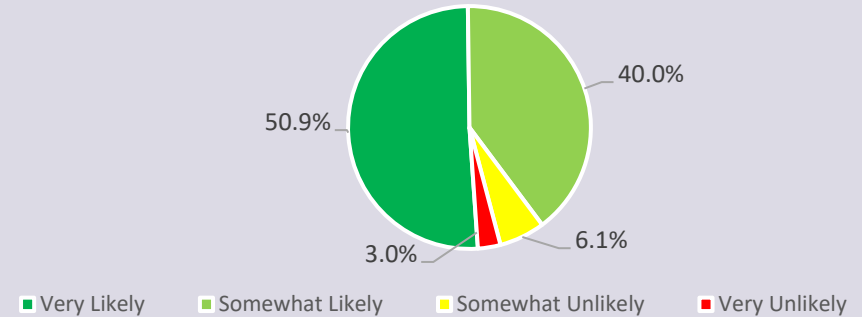
9% of out-of-town attendees made an average of **3.8** day trips to Lethbridge

TOURISM LETHBRIDGE

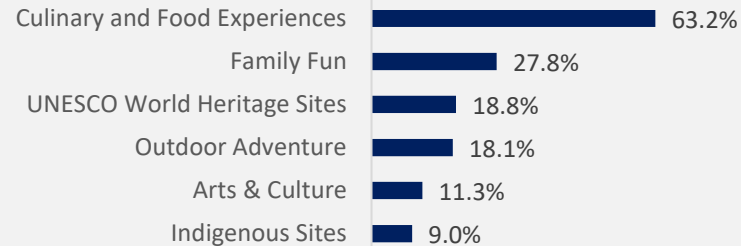
Future Visitation to Lethbridge



Recommend Lethbridge to Others

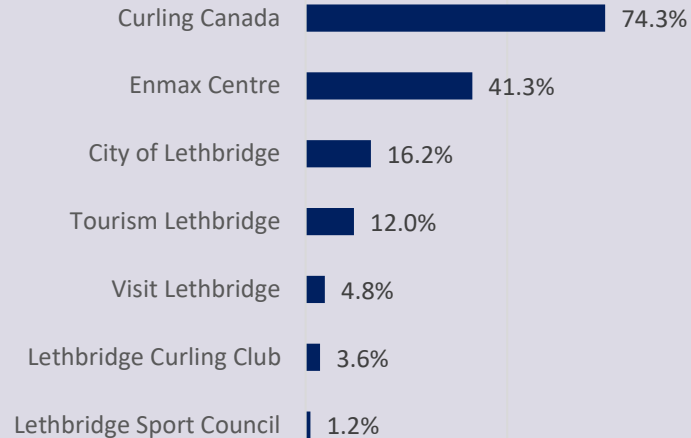


Type of activities most interested in while in Lethbridge:



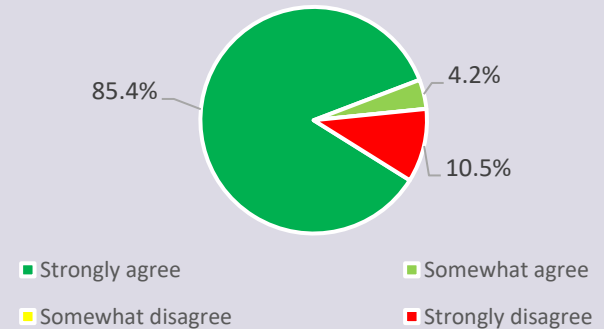
TOURISM LETHBRIDGE

Websites utilized that were helpful in learning about opportunities in Lethbridge



Locals were asked to rate this statement:

"I support Lethbridge in continuing to attract national and international events to the city"



SUMMARY | BY THE NUMBERS

2022 Tim Hortons Brier – Key Facts & Figures

\$13.2 million of initial expenditures	\$10.8 million of visitor spending	128 local jobs supported by the event	\$19.7 million overall economic activity in the province
18,500 out of town visitors* in Lethbridge	\$5.4 million of wages and salaries supported locally	\$10.3 million boost to provincial GDP	\$3.9 million in taxes supported across Canada

** Visitors derived from attendance figures obtained from event organizers combined with results from the survey.*

APPENDIX – GLOSSARY OF TERMS

Initial Expenditure - This figure indicates the amount of initial expenditures used in the analysis. This heading indicates not only the total magnitude of the spending but also the region in which it was spent (thus establishing the "impact" region).

Direct Impact - Relates ONLY to the impact on "front-line" businesses. These are businesses that initially receive the operating revenue or tourist expenditures for the project under analysis. From a business perspective, this impact is limited only to that particular business or group of businesses involved. From a tourist spending perspective, this can include all businesses such as hotels, restaurants, retail stores, transportation carriers, attraction facilities and so forth.

Indirect Impact - Refers to the impacts resulting from all intermediate rounds of production in the supply of goods and services to industry sectors identified in the direct impact phase.

Induced Impact - These impacts are generated as a result of spending by employees (in the form of consumer spending) and businesses (in the form of investment) that benefited either directly or indirectly from the initial expenditures under analysis.

Gross Domestic Product (GDP) - This figure represents the total value of production of goods and services in the economy resulting from the initial expenditure under analysis (valued at market prices). **GDP (at factor cost)** - This figure represents the total value of production of goods and services produced by industries resulting from the factors of production. The distinction to GDP (at market prices) is that GDP (at factor cost) is less by the amount of indirect taxes plus subsidies.

Wages & Salaries - This figure represents the amount of wages and salaries generated by the initial expenditure. This information is presented by the aggregate of direct, indirect, and induced impacts.

Employment - Depending upon the selection of employment units (person-years or equivalent full-year jobs) these figures represent the employment generated by the initial expenditure. "Equivalent Full-Year Jobs", if selected, include both part-time and full-time work in ratios consistent with the specific industries.

Industry Output - These figures represent the direct & indirect and total impact (including induced impacts) on industry output generated by the initial tourism expenditure. It should be noted that the industry output measure represents the sum total of all **economic activity** that has taken place and consequently involve double counting on the part of the intermediate production phase. Since the Gross Domestic Product (GDP) figure includes only the net total of all economic activity (i.e. considers only the value added), the industry output measure will always exceed or at least equal the value of GDP.

Taxes - These figures represent the amount of taxes contributed to municipal, provincial, and federal levels of government relating to the project under analysis.

CONTACT INFORMATION

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^{2.0}**, **STEAMPRO^{2.0}** or **FESTPRO** on any other type of event, please contact research@sporttourismcanada.com

