
Memorandum

To: Budget Standing Committee

Cc: Senior Management Team;
Amy Tomaino, Manager Business Planning and Strategic Services

From: Jennifer Douglas, Community Partnership Officer

Date: May 9, 2018

Subject: 2017 Scotties Tournament of Hearts – Economic Impact

On April 16th the Budget Standing Committee requested that staff prepare a memo with additional information surrounding the Economic Impact on the 2017 Scotties Tournament of Hearts (STOH) using the Brock Niagara Community Observatory Centre for Sport Capacity's February 2018 policy brief (Appendix 1).

The 2017 Scotties Tournament of Hearts (STOH) was held in St. Catharines from February 16-26, 2017 at the Meridian Centre. The STOH is the women's national curling championship that attracted more than 60,000 spectators and more than 100 hours of television coverage through TSN.

Economic Impact

- The 2017 STOH reported that the total Economic Impact in the Niagara Region was \$6,806,113.00
- The 2017 STOH reported that the total Economic Impact in the Ontario was \$11,193,736.00

Source:

Centre for Sport Capacity | 2017 Scotties Tournament of Hearts Event Impact Report | Prepared by Chris Charlebois & Dr. Julie Stevens

TREIM (Tourism Regional Economic Impact Model) was utilized. TREIM is produced and managed by the Ontario Ministry of Tourism, Culture and Sport.

Tourist Information

- 60% of respondents were from outside the Niagara Region
- 97% of respondents indicated the 2017 STOH as the reason for travel
- 2.5 travelers was the average group size traveling
- 4 nights was the average length of stay

- \$735 was the average group spending

Area of Residence

- 18.73% St. Catharines
- 23.11% Niagara Region
- 39.04% Ontario – within 320km of St. Catharines
- 13.55% Ontario – more than 320km of St. Catharines
- 5.58% Out of Province
- 0% National

Source:

*Centre for Sport Capacity | 2017 Scotties Tournament of Hearts Event Impact Report |
Prepared by Chris Charlebois & Dr. Julie Stevens*

The 2017 Scotties Tournament of Hearts was an overwhelming success in the Niagara Region. The unanimous approval of the Meridian Centre fee waiver from St. Catharines Council in the amount of \$140,000 along with staff resources to assist in the execution of the event proved to be a positive partnership investment. The hosting of the Scotties Tournament of Hearts also showcased there is great value and need further regional collaboration with events of significance in the community. The work conducted by the Centre for Sport Capacity at Brock University provided incredible insight to the impact of the event in the community but this initiative was a singular opportunity that allowed us access to the results. There is no guarantee that on a move forward basis we will have access to this information for future events brought to the City of St. Catharines unless we actively invest in this type of service in the future.

Sincerely,

Jennifer Douglas

Centre for Sport Capacity

2017 Scotties Tournament of Hearts

Event Impact Report



Prepared for: Curling Canada

Prepared by:

Chris Charlebois & Dr. Julie Stevens

January 25, 2018

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Background

In the fall of 2016, Curling Canada and the Brock University Centre for Sport Capacity came to an agreement to conduct a study on the impact of the 2017 Scotties Tournament of Hearts (STH) in St. Catharines, Ontario. Utilizing the research of masters student Chris Charlebois, the study would aid Curling Canada in understanding both the economic assessment and the perceived impacts of the 2017 STH. In particular, the research seeks to identify a new means to evaluate the overall impact of a sport event that extends from the traditional economic activity indicators to include a more comprehensive 'triple bottom line' approach.

Purpose

The purpose of this report is twofold. Firstly, the report is intended to provide a summary of the overall economic impact of the 2017 Scotties Tournament of Hearts which took place in St. Catharines, Ontario from February 16-28, 2017. Secondly, the report provides insights into future potential evaluation mechanisms which Curling Canada can utilize to report back to event funders, sponsors and other agencies or organizations for its own purposes.

Methodology

In order to conduct the economic assessment as well as the perceived impacts analysis, a survey tool was developed to capture demographic information, spending patterns and measures for perceived impacts from event attendees. The perceived impact questionnaire was built utilizing a Scale of Perceived Social Impacts (SPSI) model developed and published in 2015 by Kim, Walker & Dane.¹

To conduct the economic assessment the TREIM (Tourism Regional Economic Impact Model) was utilized. TREIM is produced and managed by the Ontario Ministry of Tourism, Culture and Sport. It was selected as it is an open-sourced tool and is applied by other event and festival organizers in the province of Ontario. The TREIM model was update in Fall, 2017 and incorporates very current economic statistics.

¹ Kim, W., Jun, H., Walker, M. & Drane, D. (2015). Evaluating the perceived social impacts of hosting large-scale sport tourism events: scale development and evaluation. *Tourism Management*, 48, 21-32.

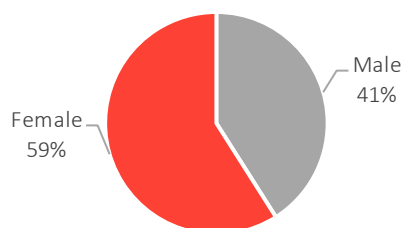
Results

In total, 278 survey responses were collected. Due to user error and technology issues only 251 responses were considered usable data. Outlined below are the summaries of various information collected through the survey tool.

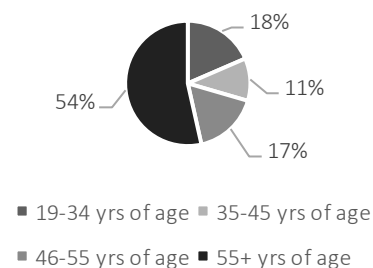
Demographics

The majority of respondents were females (59%) and 72% of respondents were over the age of 46 years. Almost 60% of respondents had a household income of over \$75,000 per year and 95% of all respondents were Caucasian. University graduate accounted for 45% of participants and 25% of respondents were retired. The highest rated employment sectors were education, law and government services (16%), health (12%) and business and administration services (12%)

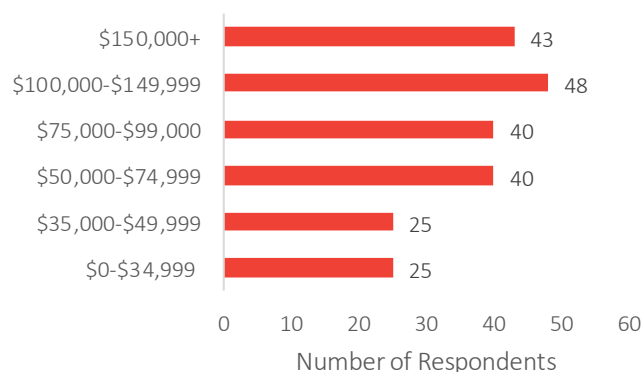
Attendee Gender (n=251)



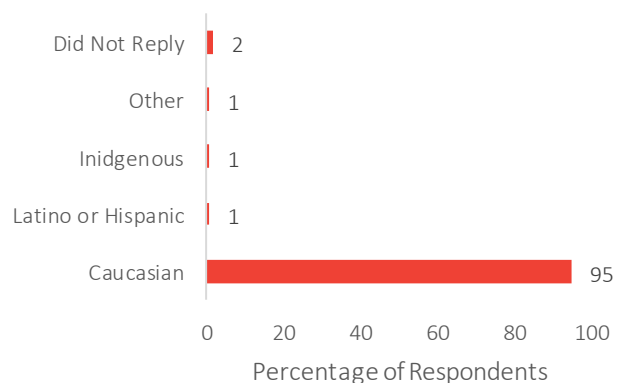
Attendee Age (n=251)



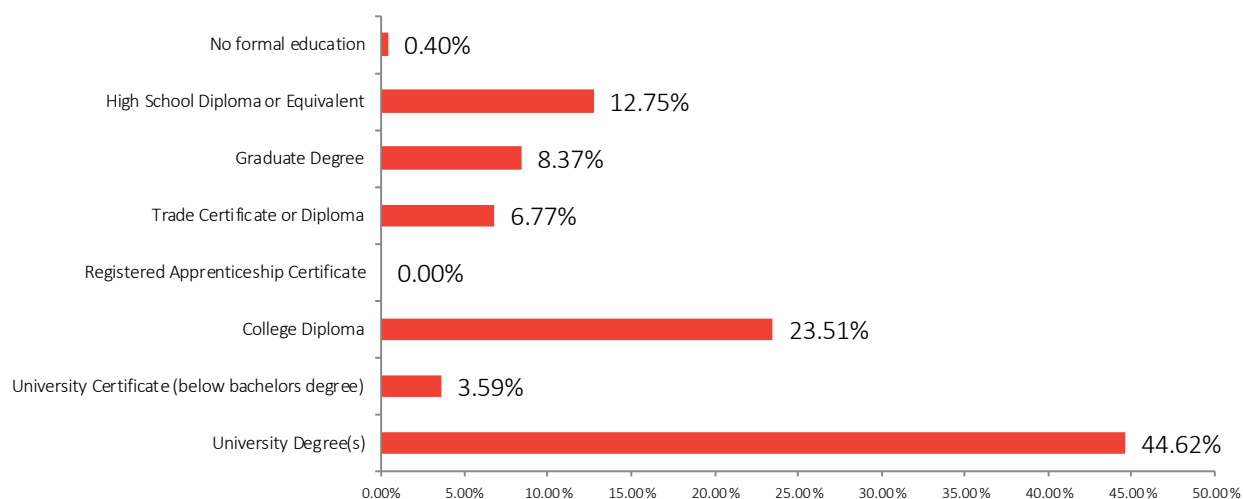
Attendee Income Levels (n=221)



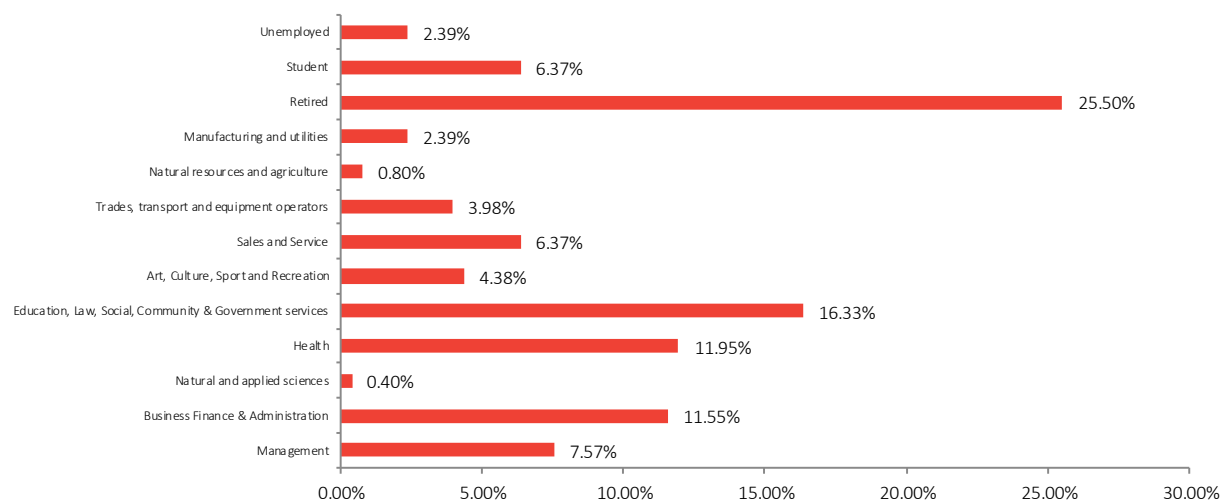
Attendee Ethnicity (n=251)



What is your highest level of education?

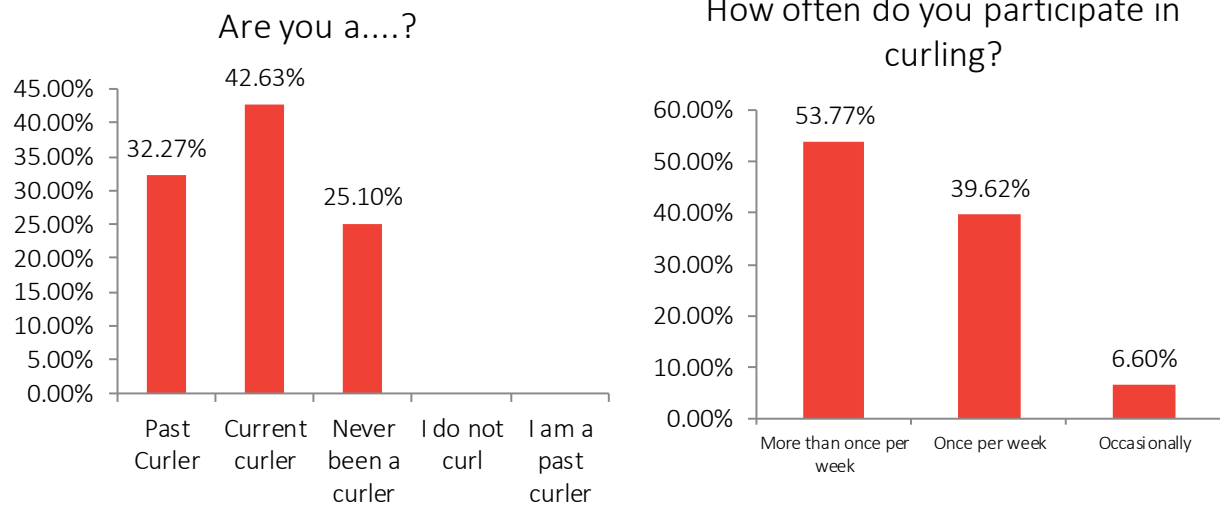


What is your occupation (please select the one category that most accurately reflects your current employment)?

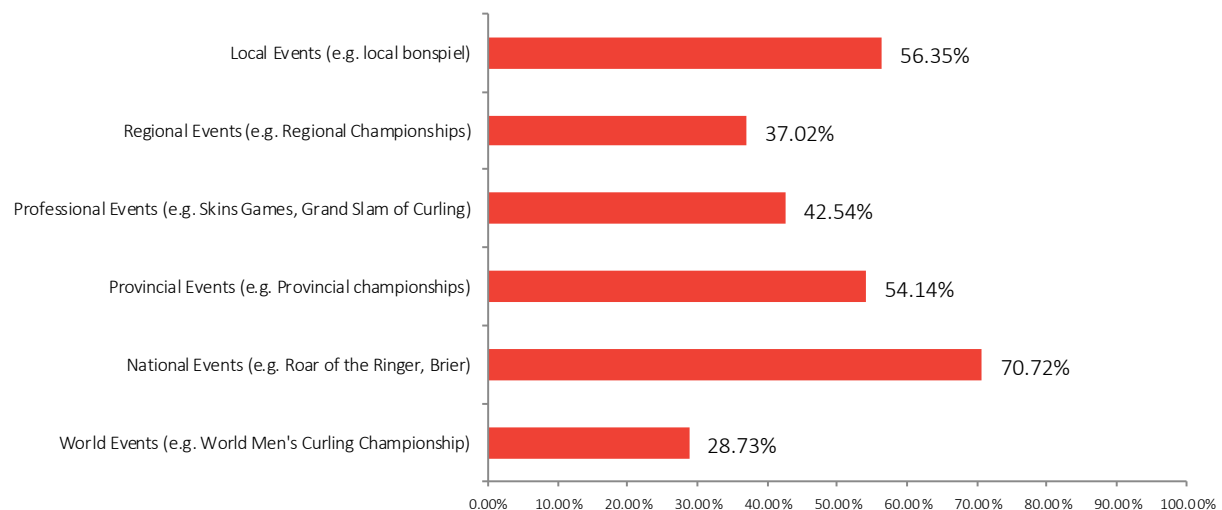


Curling Participation

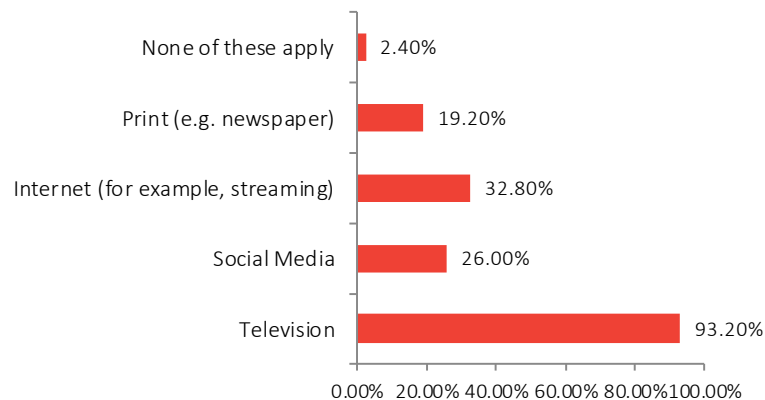
Outlined below are the responses related to curling participation:



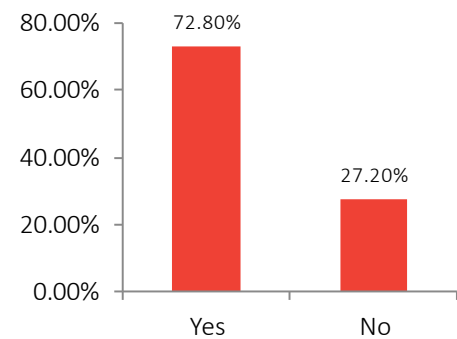
If you have attended past curling events, please select all of the types of events you have attended



What media do you use to watch or enjoy curling (check all that apply)?



Have you attended previous curling events?



In total, 75% of respondents had participated in the sport prior to coming to the 2017 Scotties. Of those who are currently participating, 94% enjoy the sport once a week at minimum; if not, more frequently. Interestingly, 25% of respondents had never curled and 27% had never attended any curling event.

Digital is the most common means of curling with television, internet and social media being the highest ranked mediums, respectively. Of respondents who have attended past curling events, national events ranked the most popular with local and provincial events ranking second and third, respectively.

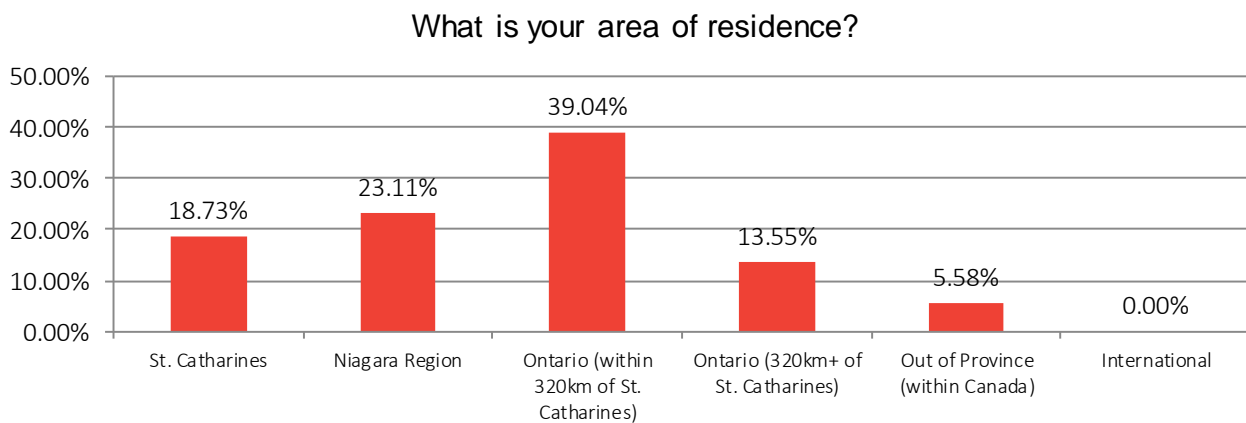
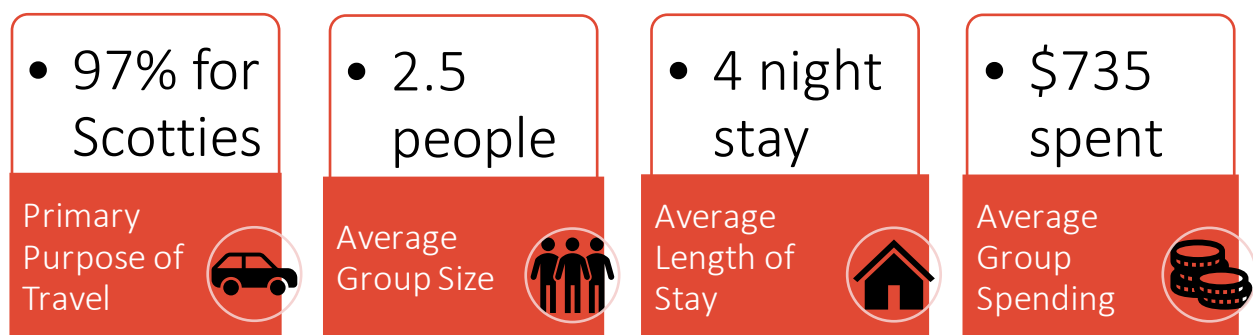


Source: St. Catharines Standard/Bob Tymczyszyn, 2017

Tourism and Economic Assessment

Tourist Information

Almost 60% of respondents were from outside of the Niagara region, suggesting that the event had a significant tourism draw. 97% of respondents cited the 2017 Scotties Tournament of Hearts as their primary purpose for travel. Out of all respondents, the average person was traveling in a group of 2.5 travelers who stayed overnight for an average of 4 nights. Based on spending pattern data collected, the average group spent a total of \$735 per trip.



Economic Activity Information

Utilizing the TREIM (Tourism Regional Economic Impact Model) tool, visitor expenditures and the event's operating budget were inputted to generate an overall economic assessment. The table below provides summary data of key economic categories.

Economic Category	St. Catharines/Niagara	Ontario
(Dollars)		
Initial Expenditure	\$6,948,654	\$6,948,654
Gross Domestic Product		
Total Impact	\$4,125,222	\$5,546,681
Wages & Salaries		
Total Impact	\$2,587,277	\$3,357,873
Employment (full-year jobs)		
Total Impact	56.6	66.8
Taxes (Direct Impact)		
Federal	\$578,388	\$589,164
Provincial	\$742,524	\$754,709
Municipal	\$49,377	\$53,208
Total	\$1,370,288	\$1,397,081
Taxes (Total Taxes)		
Federal	\$746,915	\$905,049
Provincial	\$895,760	\$1,055,557
Municipal	\$93,614	\$139,577
Total	\$1,736,289	\$2,100,182
Industry Output		
Total Impact	\$9,044,423	\$11,193,736

Perceived Event Impact

As a part of the survey, respondents were asked to rate their agreement or disagreement across a number of positive and negative based statements associated with economic, social and environmental impacts. The Likert scale was a 7-point scale with 1 being strongly disagree and 7 being completely agree. Highlighted below are the results for each impact statement, as well as average scores across each impact area.

The **positive event impacts** with the highest average score were:

- *“Increased economic activity for local business”* (economic)
- *“Generated excitement to the host community”* (social)
- *“Increased opportunity to enjoy curling events”* (Social)

The **negative event impacts** with the highest average score was:

- *“Increased hardship for finding parking”* (social)
- *“Increased amount of litter and waste”* (environmental)

Perceived Economic Impacts

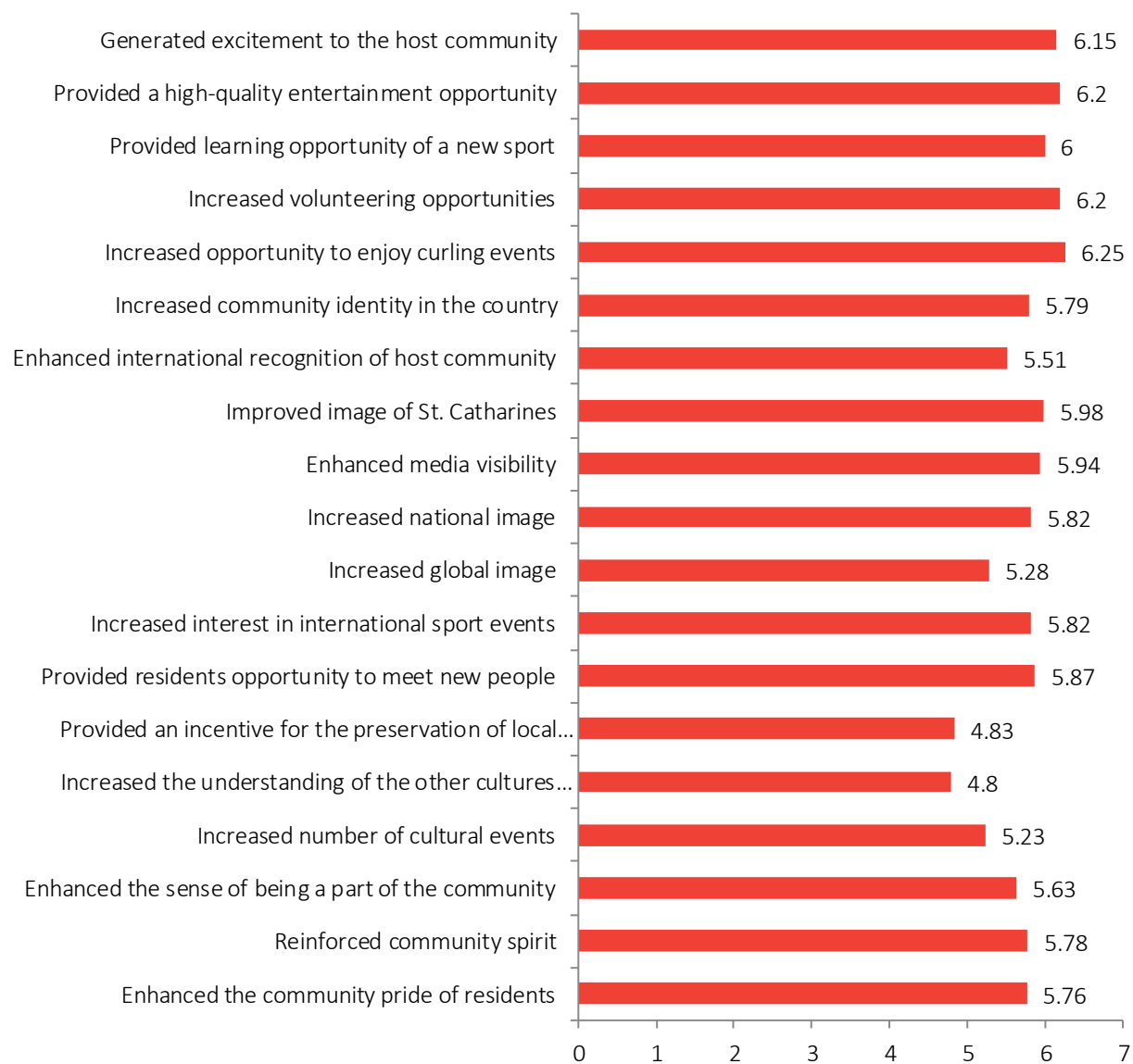
Please rate the following statements (1 being completely disagree, 7 being completely agree) based on your perceptions of the impacts of the 2017 Scotties Tournament of Hearts



Perceived Positive Social Impacts

Please rate the following statements (1 being completely disagree, 7 being completely agree) based on your perceptions of the impacts of the 2017 Scotties Tournament of Hearts

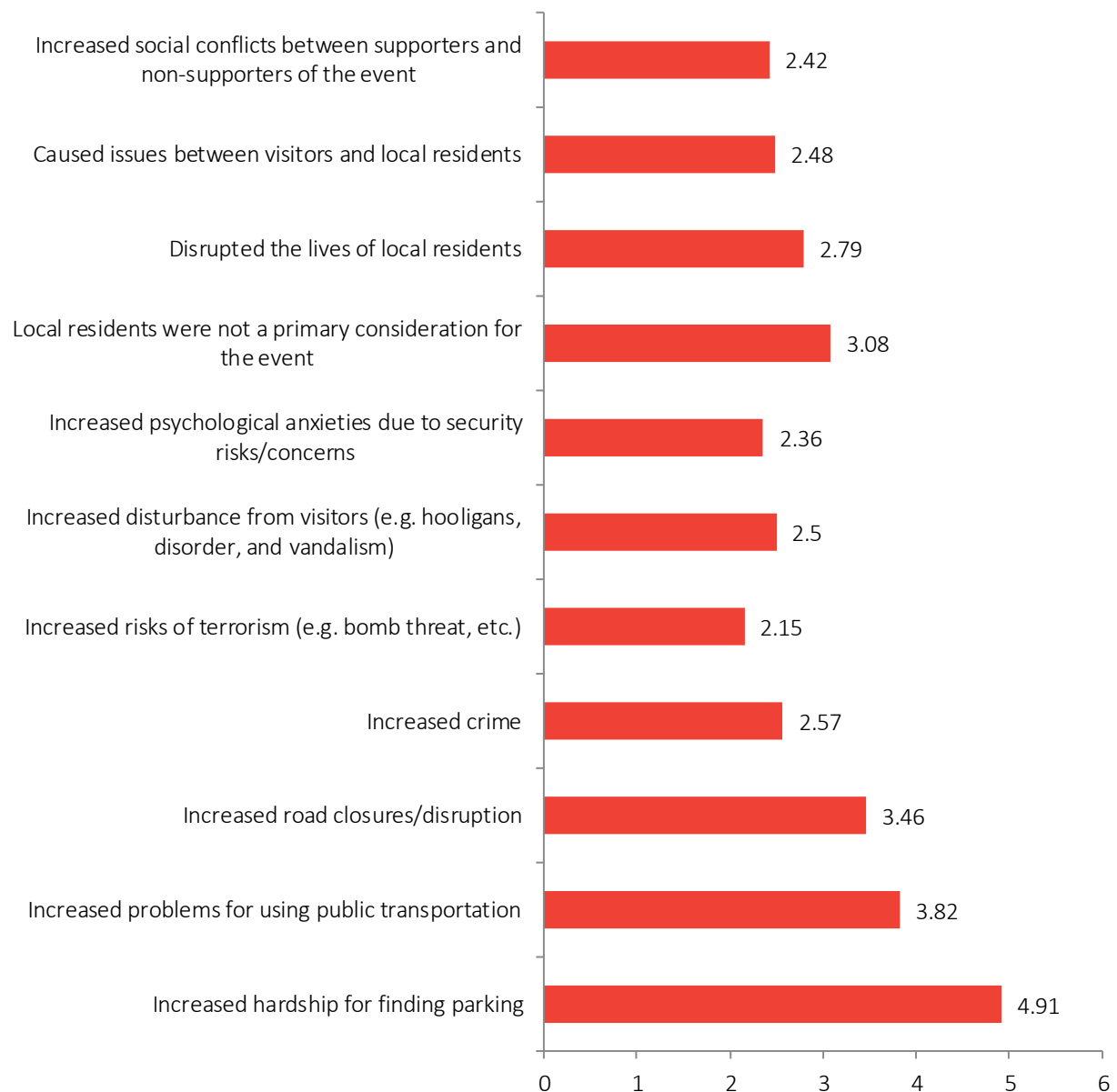
Positive Impact Factors



Perceived Negative Social Impacts

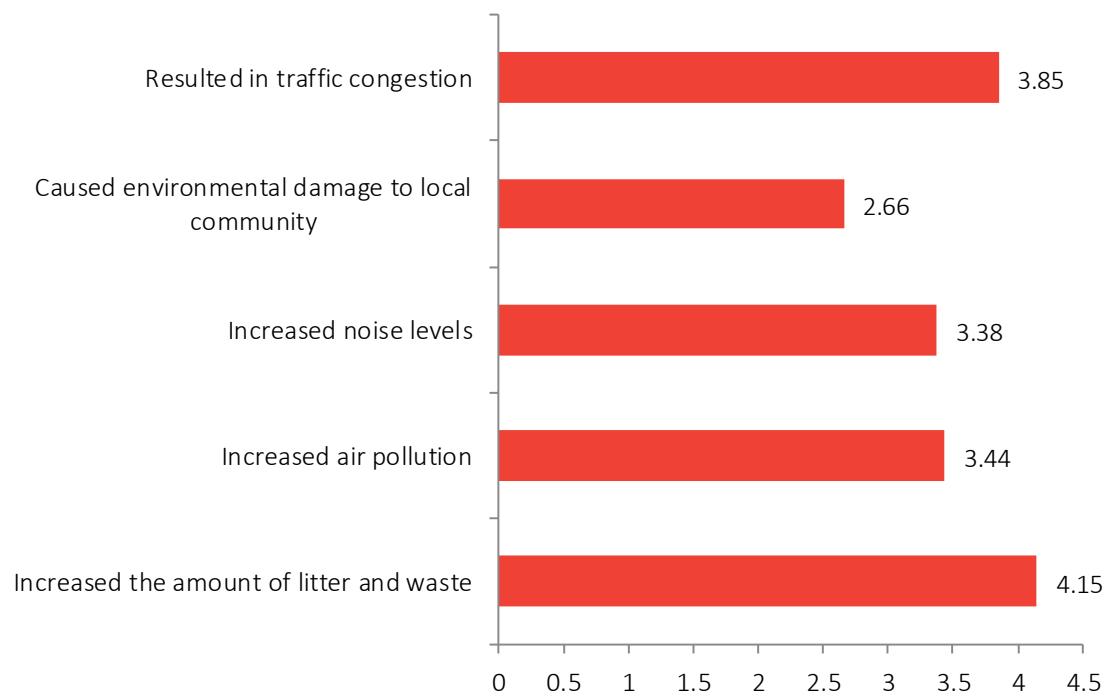
Please rate the following statements (1 being completely disagree, 7 being completely agree) based on your perceptions of the impacts of the 2017 Scotties Tournament of Hearts

Negative Impact Factors



Perceived Environmental Impacts

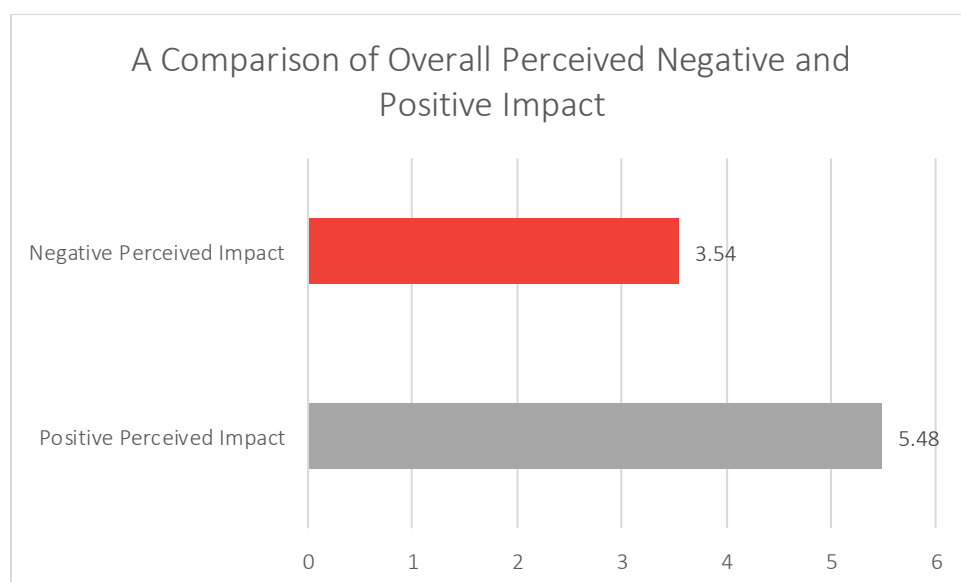
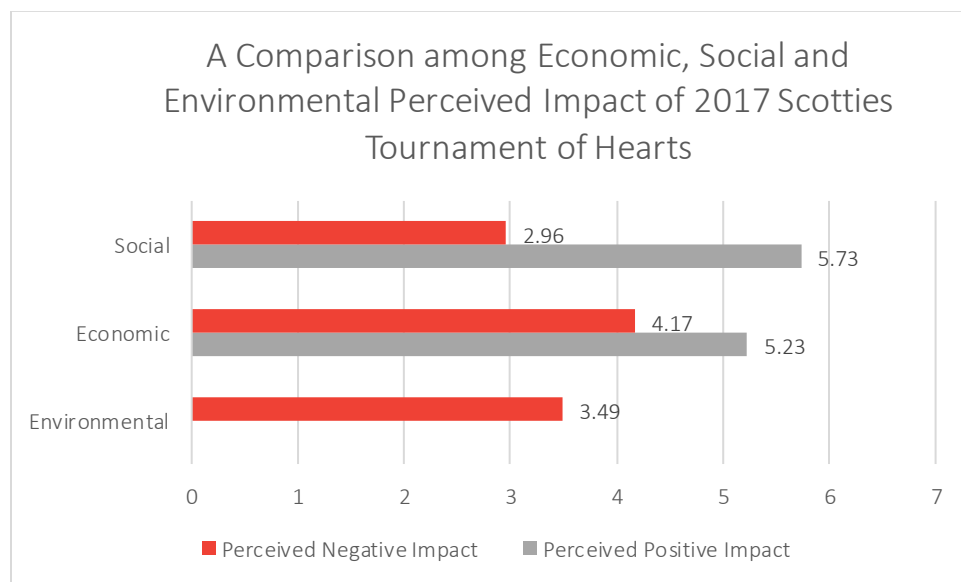
Please rate the following statements (1 being completely disagree, 7 being completely agree) based on your perceptions of the impacts of the 2017 Scotties Tournament of Hearts



Comparison of Perceived Impacts

Overall, event attendees indicated the 2017 Scotties Tournament of Hearts had a positive impact on the community.

The highest average scores were attributed to positive social and economic impacts. The overall positive event impact average was nearly two-points higher than the average for overall negative event impact.



Discussion

This report provides valuable insights for Curling Canada to better understand the demographics of event attendees for one of its premier national events. Demographic information should assist in sponsorship targeting and identifying effective promotional and media consumption channels for future use.

Economic assessments are one of the most common ways for event rights holders to measure the value of their event. However, given event resource constraints, the methodology applied to this study offers an approach that can provide further insight and justification for an events right holder who seeks financial support from government and funding agencies.

By combining some of the data from the sample in this study with ticket purchasing data, Curling Canada may also be better positioned to leverage the assistance of a marketing agency, or equip its staff with valuable information to acquire new sponsorships.

Limitations

There are some limitations to this study. They are as follows:

1. The study did not seek the perceived impacts of non-event attendees. There is the potential for inherent bias given event attendees presumably already have an interest in curling.
2. Previous studies on perceived event impacts did not include data collection related to quantifiable economic impact criteria. Without any financial resources put into the project by Curling Canada, the Centre for Sport Capacity had limited human resources to collect a significant number of responses. With over 35,000 unique ticket purchasers, only a small number of surveys were collected (n=251), representing a small proportion of the overall spectator-base. Survey length also played a factor in being able to collect all of the data required to analyze the economic impact and perceived event impacts

With a number of national-level events that receive high publicity, Curling Canada is well positioned to demonstrate its leadership as a pioneer in event impact evaluation. With significant investments required by municipal and provincial governments, exploring new ways to report event outcomes, such as an approach that integrates a traditional economic assessment with a progressive 'triple-bottom-line' perceived impact analysis, may offer an additional means by which to justify the investments made by hosting communities.

Conclusion

This report provided basic demographic data including factors such as age, ethnicity, employment sectors and media consumption along with tourism-based information such as average length of stay and average group spending patterns which may prove useful for presenting future events to host cities.

Overall, attendees perceived that the event had a net positive impact on the community, with the highest weighted value placed on social impacts such as an enhanced sense of community pride, an opportunity to meet new people, and an increased image for the City of St. Catharines, to name a few.

As a sport sector pioneer who stages high-quality spectator-based events, Curling Canada is uniquely positioned to utilize this report as a means to explore new ways of reporting overall event impacts on a host community. With financial resources being highly sought from municipal and provincial government agencies, these types of insights provide further rationale for decision-makers to support Curling Canada events on a go-forward basis.



Source: Brock University Communications, 2017