Executive Summary

The following analysis provides an assessment of the potential economic impact of the 2004 Nokia Brier, hosted in Saskatoon, SK on March 6th through March 14th, 2004, as generated by the Sport Tourism Economic Assessment Model.
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Canadian Tourism Commission
Canadian Curling Association
Tourism Saskatoon

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1.0 Background

2004 marked the 75th edition of the Men’s national curling championships, otherwise known as the Brier. This year was the fourth year in which Nokia Canada was the title sponsor, following the Macdonald Tobacco Company (1927-1979) and Labatt Breweries (1980-2000). Throughout the championship series, the province of Manitoba has won more titles than any other province, with a total of 26 victories. Of the eleven other provincial and territorial teams, Alberta ranks second, having won 21 championships over the 75 year period.

The city of Saskatoon played host to the event for the fifth time, with Saskatchewan Place being an ideal venue. As a result, the 2004 Brier was a major success, with the highest paid attendance in the event’s history, with a total attendance of 238,129. In addition to the large audience in attendance, all of the draws were broadcast live on TSN, switching to CBC for the semi-final and final draws. Overall, the event was well attended, and provided a considerable economic benefit for the city of Saskatoon and the province of Saskatchewan. For example, the Brier Patch (the 4,500 seat on-site beer garden) saw more than 140,000 visits and sales in excess of $1,000,000 over the nine day period.

This study focuses on the economic benefits resulting from hosting of this event. The Brier attracted an estimated total of 12,568 unique spectators who traveled more than 80km, one way, to watch the competition. The spending of these travelers while in Saskatoon is discussed in detail in Sections 2 and 3, with the former outlining the survey methodology, while the latter details the survey results. Section 4 examines other expenditures which contributed to the economic benefit of the event, such as the operational and capital expenditures of the organizing committee, as well as expenditures associated with the media. Detailed economic impact results are covered in Section 5, while Section 6 summarizes the findings of the study. The appendices provide a more detailed description of the STEAM model, a glossary of the terminology used, and a copy of the survey instrument.
2.0 Methodology

The survey instrument was prepared using the Techneos Entryware Pro System, which features the Entryware™ Designer software program for preparing the questionnaires. Interviews were then conducted using Palm PDAs running Techneos Entryware™ data entry software¹. Surveying began half an hour prior to the start of each draw and continued through to the first end, or approximately 15 minutes after the draw began, thereby allowing the spectators to enjoy the remainder of the competition uninterrupted. Over the course of the event, a total of 595 valid surveys were completed, of which 428 people indicated that their place of permanent residence was more than 80km, one-way, from Saskatoon². Compared to other events at which the CSTA has conducted surveys, the refusal rate at the Brier was extremely low at 1.2%. This may have been due to the age of the respondents (the average age was significantly higher than at other events), as well as the less intrusive survey design.

Respondents to the survey were chosen using a systematic, stratified sampling plan. Interviewers were assigned a specific section for each draw, with the sections chosen in a manner that allowed for a broad selection of respondents to be chosen³. Surveys were administered to the visitor parties seated at the end of each of the rows, as it was assumed that spectators would be assigned their seats in a randomized fashion. ⁴ Additionally, the seating layout did not facilitate traveling into the middle of the rows. Basic information such as the size of the visitor party, the type of ticket, and frequency of attendance was collected from all respondents, while those who indicated they were from out-of-town were asked to complete the longer expenditure survey.

Package tickets (either full-event tickets or one of the shorter packages) accounted for 87.5% of all seats sold. Information as to the origin of package ticket holders was obtained from the postal codes attached to the ticket sales database. Consequently, the data from the ticket sales was used to determine the origin of package ticket holders, while survey findings were used to ascertain the origin of those who purchased their tickets on a draw-by-draw basis. The numbers of unique spectators, broken down by geographic origin, are found in Table 2.1. This information has also been used to provide the estimated confidence intervals of the sample.

¹ A copy of the survey given at the event can be found in Appendix 3.
² This is our working definition of a tourist visit, derived from the definition currently employed by the Canadian Tourism Commission (CTC). Their definition is slightly broader, as it also includes those visitors who are traveling less than 80km but staying overnight in the city.
³ Exceptions are spectators who had access to the Diamond Terrace (which was a restricted seating area located at one end of the arena) or the corporate box seats. Surveyors were not permitted to access these areas.
⁴ A copy of the training guide and survey plan that were used are available from the CSTA upon request.
<table>
<thead>
<tr>
<th>Category</th>
<th>Sample Size</th>
<th>Population$^1$</th>
<th>Estimated Confidence Interval$^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saskatoon &amp; up to 80 km</td>
<td>167</td>
<td>9,377</td>
<td>7.5%</td>
</tr>
<tr>
<td>Rest of Province</td>
<td>231</td>
<td>7,472</td>
<td>6.3%</td>
</tr>
<tr>
<td>Out of Province</td>
<td>197</td>
<td>5,308</td>
<td>6.8%</td>
</tr>
<tr>
<td>Total</td>
<td>595</td>
<td>22,157</td>
<td>4.0%</td>
</tr>
</tbody>
</table>

$^1$The population is greater than the number of tickets sold as some package ticket holders shared their seats. For individual ticket holders, the situation was reversed with the average ticket holder returning for more than one draw.

$^2$The actual value can be expected to be found within plus or minus the confidence interval, 19 times out of 20.

One way in which this study differs from others conducted by the CSTA is that same province travelers were not differentiated based on the distance that they traveled to the event. Previously, the distance traveled was determined by using the first three digits of travelers’ postal codes, otherwise known as Forward Sortation Areas (FSAs). However, in the province of Saskatchewan, these areas are too large to provide a consistent break point, thus all intra-provincial travelers are grouped within the same category.
3.0 Visitors

One of the primary benefits of hosting an event such as the Brier is the considerable increase in the number of visitors to the local community. For the purposes of this study, three types of visitors were considered: participants, spectators, and media/VIPs\(^5\). The organizing committee provided data for both participants, and VIPs, while information for non-local media members was obtained directly from the CBC and TSN. Spectator profiles were derived from the survey data, which were then weighted to match the overall size of the spectator population detailed in Table 3.2 below.

3.1 Participants

A total of 72 participants took part in the event (12 teams featuring 4 participants, 1 spare, and 1 coach). While in Saskatoon, the participants' food and accommodation expenses were paid for by the organizing committee, thus these expenditures have been included in the operational budget and excluded from the visitor spending. The average participant spent 10 nights in Saskatoon and came from out of province (Table 3.1). The notable exception was team Saskatchewan, based in Muenster, SK, which is located less than 300 km from Saskatoon. Participants were mostly under the age of 45, with more than 94% of participants falling in the 20 to 44 age category.

<table>
<thead>
<tr>
<th>Table 3.1 Participant Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants</td>
</tr>
<tr>
<td>Average length of Stay</td>
</tr>
<tr>
<td>Age Profile</td>
</tr>
<tr>
<td>20 to 44</td>
</tr>
<tr>
<td>45 and over</td>
</tr>
<tr>
<td>Distance Traveled</td>
</tr>
<tr>
<td>80km – 320 km</td>
</tr>
<tr>
<td>Out of Province</td>
</tr>
</tbody>
</table>

3.2 Spectators

The Nokia Brier is clearly a spectator oriented event, and in many regards is uniquely Canadian. With the event being a national championship, spectators came to Saskatoon from every province and territory. Indeed, the proportion of visitors who traveled to the Brier from out of town was very high, with nearly six of every ten spectators (57.7%) having come from more than 80km away. Of travelers surveyed, more than four in ten (41.5%) had traveled from out of

\(^5\) As such, this can be considered a tourism economic impact assessment as opposed to a traveler economic impact assessment, as neither participants nor VIPs are being paid, and members of the media, as they are not remunerated at the place visited.
province. As previously mentioned, the age of travelers at the Brier was considerably older than for other events. The majority of travelers from within the province were in the 45 to 54 age category (36%), while those who came from out of province were most commonly in the 55 to 64 age group (32%); see Figure 3.1, below.

**Figure 3.1 Spectator Age Profile by Distance Traveled**

With the multi-draw format of the Brier, a large number of spectators came back for more than one draw. For example, Saskatoon residents that were using single draw tickets most commonly came for just one draw per day (78.3%). However, the majority of these local residents came back to the event for more than one day, as the typical local spectator using draw-by-draw tickets came back to the event an average of 2.5 days. The more serious curling enthusiasts in Saskatoon purchased either the small or the full ticket package, and in these cases most (72.4% of small packages, 76.3% of full packages) attended all of the possible draws.

Other residents of Saskatchewan using tickets that were purchased draw-by-draw came for an average of two draws per day (as indicated by 64.9% of respondents). Out of town residents of Saskatchewan who were using package tickets were the most likely of all spectators to indicate that they attended as many draws as possible, as revealed by 88.9% of both small and full package ticket purchasers. Out of province travelers using single draw tickets indicated that they usually attended two draws per day, and spent an average of 2.3 days at the event. Out of province package holders were not quite as committed to attending all of the available draws as Saskatchewan residents, with 46.7% of small package holders and 70.4% of full event ticket holders attending all of the draws. This fits with anecdotal evidence collected during the interview, where many respondents indicated that they would be missing either the first draw in the morning, or they would only attend the draws at which their provincial team was playing.
Table 3.2  Ticket purchases by type and origin

<table>
<thead>
<tr>
<th>Tickets(^1)</th>
<th>Full Package (22)</th>
<th>Opener (5)</th>
<th>Midweek Days (6)</th>
<th>Midweek Full (9)</th>
<th>Finals (8)</th>
<th>Draw Tickets (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sold</td>
<td>7,584</td>
<td>1,744</td>
<td>726</td>
<td>921</td>
<td>2,295</td>
<td>20,154</td>
</tr>
<tr>
<td>Saskatoon &amp; up to 80km</td>
<td>41.5%</td>
<td>41.8%</td>
<td>59.6%</td>
<td>28.7%</td>
<td>34.0%</td>
<td>47.4%</td>
</tr>
<tr>
<td>Rest of Province</td>
<td>26.8%</td>
<td>36.2%</td>
<td>28.8%</td>
<td>51.7%</td>
<td>30.4%</td>
<td>43.0%</td>
</tr>
<tr>
<td>Out of Province</td>
<td>31.7%</td>
<td>22.1%</td>
<td>11.6%</td>
<td>19.6%</td>
<td>35.6%</td>
<td>9.6%</td>
</tr>
</tbody>
</table>

\(^1\) The number in parentheses indicates the number of draws each package (ticket) provided admission for.

More information from the survey is detailed in the two tables below, with Table 3.3 showing the accommodation types used by visitors to the event. Travelers from within Saskatchewan who came to the event with package tickets were equally likely to stay with friends and relatives or in commercial accommodation; whereas travelers from out of province used commercial accommodation more frequently. Overall, 40.6% of in province travelers to the Brier stayed in commercial accommodation, while the remainder was divided equally between those who traveled daily to the event (30.0%) and those who stayed with friends and relatives in Saskatoon (29.3%). More than two thirds (68.0%) of out of province visitors stayed in commercial accommodation.

Table 3.3  Accommodation use by Ticket Type and Origin

<table>
<thead>
<tr>
<th></th>
<th>One Draw Pass</th>
<th>Small Package (2 or 3 days)</th>
<th>Full Match Ticket (All draws)</th>
<th>All Ticket Holders</th>
</tr>
</thead>
<tbody>
<tr>
<td>In province</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Same Day</td>
<td>57.1%</td>
<td>8.1%</td>
<td>21.8%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Friends/Relatives</td>
<td>5.2%</td>
<td>45.9%</td>
<td>39.3%</td>
<td>29.3%</td>
</tr>
<tr>
<td>Commercial</td>
<td>37.7%</td>
<td>46.0%</td>
<td>38.9%</td>
<td>40.6%</td>
</tr>
<tr>
<td>Out of Province</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Same Day</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Friends/Relatives</td>
<td>45.5%</td>
<td>26.0%</td>
<td>32.6%</td>
<td>32.0%</td>
</tr>
<tr>
<td>Commercial</td>
<td>54.5%</td>
<td>74.0%</td>
<td>67.4%</td>
<td>68.0%</td>
</tr>
</tbody>
</table>

These results partially explain the variation in per person average daily expenditures of travelers while in Saskatoon, a sampling of which is detailed in Table 3.4. Surprisingly, travelers who attended the event using single draw tickets had higher average daily expenditures; however the majority of this was a result of higher restaurant and concession/Brier Patch expenditures. Also of note was that expenditures at the concessions/Brier Patch were greater than the expenditures on food in other restaurants in the local community. Overall, Saskatchewan travelers spent an average of $63.93 per day while attending the Brier. The largest expense category was food and beverages, with the concessions at Saskatchewan Place and the Brier patch accounting for $19.45 per person per day. Travelers from out of province had higher average daily expenditures, at $78.04 per person per day; however, they spent more than twice as much on accommodation as compared to Saskatchewan spectators ($24.07
vs. $11.06). Spending at the concessions or the Brier Patch ($17.68) was higher than the average expenditures at local restaurants ($12.58) for out of province travelers as well.

Table 3.4  
Select Average Expenditures Per Person, Per Day, 
Average Daily expenditure by Ticket Type and Origin

<table>
<thead>
<tr>
<th></th>
<th>One Draw Pass</th>
<th>Small Package (2 or 3 days)</th>
<th>Full Match Ticket (All draws)</th>
<th>All Ticket Holders</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Province¹</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>$8.90</td>
<td>$15.90</td>
<td>$9.05</td>
<td>$11.06</td>
</tr>
<tr>
<td>Restaurant</td>
<td>$26.52</td>
<td>$7.74</td>
<td>$4.30</td>
<td>$13.37</td>
</tr>
<tr>
<td>Concession / Patch</td>
<td>$27.30</td>
<td>$16.84</td>
<td>$13.38</td>
<td>$19.45</td>
</tr>
<tr>
<td>Merchandise</td>
<td>$5.33</td>
<td>$4.03</td>
<td>$6.25</td>
<td>$5.24</td>
</tr>
<tr>
<td><strong>Total²</strong></td>
<td><strong>$84.94</strong></td>
<td><strong>$62.74</strong></td>
<td><strong>$42.47</strong></td>
<td><strong>$63.93</strong></td>
</tr>
<tr>
<td>Out of Province</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>$27.88</td>
<td>$24.07</td>
<td>$23.35</td>
<td>$24.07</td>
</tr>
<tr>
<td>Restaurant</td>
<td>$17.58</td>
<td>$11.08</td>
<td>$12.44</td>
<td>$12.58</td>
</tr>
<tr>
<td>Concession / Patch</td>
<td>$26.76</td>
<td>$19.87</td>
<td>$14.78</td>
<td>$17.68</td>
</tr>
<tr>
<td>Merchandise</td>
<td>$8.64</td>
<td>$4.69</td>
<td>$7.08</td>
<td>$6.51</td>
</tr>
<tr>
<td><strong>Total²</strong></td>
<td><strong>$97.68</strong></td>
<td><strong>$71.90</strong></td>
<td><strong>$77.62</strong></td>
<td><strong>$78.04</strong></td>
</tr>
</tbody>
</table>

¹ In province excludes all those who traveled less than 80 km to the event  
² Note that this total is excluding expenditures on event tickets.

More than eight out of ten spectators stayed overnight in Saskatoon as a result of attending the Brier. Overnight spectators stayed 6.0 nights on average; and same day travelers returned to Saskatoon approximately 3.7 times over the course of the nine day event. The majority of spectators (78.5%) were over the age of 45. The Brier was the main factor influencing peoples’ decision to come to Saskatoon: the importance of the event given by spectators averaged 96.8%, with 81.1% of spectators reporting that the Brier was 100% of the reason for traveling to Saskatoon.

Table 3.5  
Spectator Profile

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Spectators</td>
<td>12,568</td>
</tr>
<tr>
<td>Average length of Stay</td>
<td>6.0 nights</td>
</tr>
<tr>
<td>Percentage Staying Overnight</td>
<td>82.4%</td>
</tr>
<tr>
<td>Importance of event in travel decision</td>
<td>96.8%</td>
</tr>
<tr>
<td>Average number of Day Trips</td>
<td>3.7</td>
</tr>
<tr>
<td>Age Profile</td>
<td></td>
</tr>
<tr>
<td>20 to 44</td>
<td>21.5%</td>
</tr>
<tr>
<td>45 and over</td>
<td>78.5%</td>
</tr>
</tbody>
</table>
3.3 Media / VIP

Media personnel from the CBC and TSN were present on site to televise the Brier live for each draw. The CBC broadcast the semi-final and final draws, while the remainder were done by TSN. Additional VIP members were brought in by the Canadian Curling Association for the event, including 19 past Brier champions. In total, there were 104 non-local media and VIPs, with the average length of stay totalling 8.4 nights. The majority of the members of this category originated from out of province.

Table 3.6 Media / VIP Profile

<table>
<thead>
<tr>
<th>Media / VIP</th>
<th>123</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average length of Stay</td>
<td>8.44 nights</td>
</tr>
<tr>
<td>Percentage Staying Overnight</td>
<td>100.0%</td>
</tr>
<tr>
<td>Average number of Day Trips</td>
<td>N/A</td>
</tr>
<tr>
<td>Distance Profile</td>
<td></td>
</tr>
<tr>
<td>80-320km</td>
<td>8.6%</td>
</tr>
<tr>
<td>Out of Province</td>
<td>91.4%</td>
</tr>
</tbody>
</table>
4.0 Expenditures

As with most large scale events, the expenditures made by the organizing committee on capital and operational items comprised a substantial amount of the economic benefit associated with the event. Moreover, media crews provided an additional source of operational spending, through the purchase and use of local supplies and resources.

4.1 Capital Expenditures

Capital investments, defined as spending on new or used buildings and/or renovations, were relatively minor for the 2004 Brier. The largest project included modifications to Saskatchewan Place for the exclusive Diamond Terrace seating area. Additionally, there was some spending at the Brier Patch beer garden and on office furniture.

Table 4.1 Capital Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buildings and Renovations</td>
<td>$243,000</td>
</tr>
<tr>
<td>Furniture and Equipment</td>
<td>$98,000</td>
</tr>
<tr>
<td>Other Supplies</td>
<td>$61,000</td>
</tr>
</tbody>
</table>

4.2 Operational Expenditures

The operational expenditures reported below combine the spending made by the organizing committee and members of the media on costs ranging from catering to insurance. In-kind donations, which totalled nearly $500,000, have not been included as they are not traditional economic transactions; thus, while they contribute to the event, they do not add to the economic impact. This practise is consistent with the methodology that has been applied to all previous events for which the CSTA has conducted impact assessments, as well as with studies prepared by all other organizations. The full details are reported in Table 4.2, below:
Table 4.2  Operational Expenditures

| Category                        | Amount  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries, Fees, &amp; Commissions</td>
<td>$182,000</td>
</tr>
<tr>
<td>Advertising</td>
<td>$137,000</td>
</tr>
<tr>
<td>Financial Services</td>
<td>$134,000</td>
</tr>
<tr>
<td>Insurance</td>
<td>$40,000</td>
</tr>
<tr>
<td>Rent / Lease</td>
<td>$311,000</td>
</tr>
<tr>
<td>Laundry &amp; Cleaning</td>
<td>$12,000</td>
</tr>
<tr>
<td>Other Business Services</td>
<td>$703,000</td>
</tr>
<tr>
<td>Communication Costs</td>
<td>$96,000</td>
</tr>
<tr>
<td>Energy and Other Utilities</td>
<td>$15,000</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>$157,000</td>
</tr>
<tr>
<td>Other Supplies</td>
<td>$66,000</td>
</tr>
<tr>
<td>Food &amp; Beverages</td>
<td>$645,000</td>
</tr>
<tr>
<td>Food &amp; Bev Subsidised</td>
<td>$60,000</td>
</tr>
<tr>
<td>Personal Travel</td>
<td>$51,000</td>
</tr>
<tr>
<td>Merchandise</td>
<td>$50,000</td>
</tr>
<tr>
<td>Transportation &amp; Storage</td>
<td>$169,500</td>
</tr>
<tr>
<td>Net Taxes</td>
<td>$10,819</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,839,319</strong></td>
</tr>
</tbody>
</table>
5.0 Results

Visitor expenditures were the largest source of economic benefit for Saskatoon as a result of hosting the Brier, with a combined initial expenditure estimated at over $6.5 million. Operational expenditures were also substantial, totalling nearly $6.4 million, while capital expenditures were more modest, at $402,000. In total, the combined initial expenditure of close to $13.3 million generated nearly $23.2 million in economic activity, of which $19.5 million occurred in the city of Saskatoon. These expenditures supported more than $3.7 million in wages and salaries for the city of Saskatoon, with a further $800,000 accruing in the rest of the province. On the whole, nearly 239 jobs were supported from hosting the Brier, with the majority of these being in Saskatoon (205) and a further 33 in the rest of the province. The overall net economic activity (GDP) generated by the event exceeded $11.0 million, of which $9.2 million took place in Saskatoon.

Considerable tax revenues were also produced by the event, totalling nearly $3.1 million. The federal government garnered $1.4 million in tax revenue, followed by the province of Saskatchewan at nearly $1.3 million. Municipalities throughout the province earned $347,000, of which $298,000 accrued to the city of Saskatoon.

Table 5.1 Potential Provincial Economic Impact by Source ($000s)

<table>
<thead>
<tr>
<th>Category</th>
<th>Operations</th>
<th>Capital</th>
<th>Visitors</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Expenditure</td>
<td>$6,363</td>
<td>$402</td>
<td>$6,520</td>
<td>$13,285</td>
</tr>
<tr>
<td>Industry Output</td>
<td>$10,662</td>
<td>$662</td>
<td>$11,852</td>
<td>$23,176</td>
</tr>
<tr>
<td>GDP</td>
<td>$5,742</td>
<td>$250</td>
<td>$5,028</td>
<td>$11,020</td>
</tr>
<tr>
<td>Wages &amp; Salaries</td>
<td>$1,675</td>
<td>$122</td>
<td>$2,744</td>
<td>$4,542</td>
</tr>
<tr>
<td>Taxes - Total</td>
<td>$910</td>
<td>$80</td>
<td>$2,083</td>
<td>$3,073</td>
</tr>
<tr>
<td>Federal</td>
<td>$448</td>
<td>$40</td>
<td>$965</td>
<td>$1,453</td>
</tr>
<tr>
<td>Provincial</td>
<td>$342</td>
<td>$32</td>
<td>$899</td>
<td>$1,273</td>
</tr>
<tr>
<td>Municipal</td>
<td>$120</td>
<td>$8</td>
<td>$219</td>
<td>$347</td>
</tr>
<tr>
<td>Jobs</td>
<td>67.4</td>
<td>5.1</td>
<td>165.9</td>
<td>238.4</td>
</tr>
</tbody>
</table>

The service sector was the largest beneficiary of the Brier’s economic impact, accounting for more than half (56.4%) of the net economic activity of the event at $6.2 million. Retail trade also saw a significant increase in its net activity ($1.4 million); followed by Finance, Insurance and Real Estate (FIRE; $865,000), and the manufacturing sector ($596,000). Nearly all of the service sector and the retail trade sector benefits accrued to the city of Saskatoon, while the benefits of FIRE and manufacturing were more wide spread.

Employment results were similar, with the majority of jobs found in the service sector (109.1) or retail trade (52.5). As both service sector and retail trade jobs
are not mobile, nearly all of the benefits from these sectors accrued to Saskatoon.

Table 5.2  Detailed GDP and Employment Estimates by Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>GDP</th>
<th></th>
<th>Jobs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Province</td>
<td>Saskatoon</td>
<td>Province</td>
<td>Saskatoon</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>$1,401</td>
<td>$1,401</td>
<td>52.5</td>
<td>52.5</td>
</tr>
<tr>
<td>Finance, Insurance, &amp; Real Estate</td>
<td>$865</td>
<td>$772</td>
<td>18.5</td>
<td>16.6</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>$596</td>
<td>$225</td>
<td>15.9</td>
<td>6.6</td>
</tr>
<tr>
<td>Services – Total</td>
<td>$6,221</td>
<td>$6,180</td>
<td>109.1</td>
<td>108.5</td>
</tr>
<tr>
<td>Accommodation</td>
<td>$874</td>
<td>$874</td>
<td>37.9</td>
<td>37.9</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>$712</td>
<td>$712</td>
<td>36.3</td>
<td>36.3</td>
</tr>
<tr>
<td>Other Services</td>
<td>$4,635</td>
<td>$4,594</td>
<td>34.9</td>
<td>34.3</td>
</tr>
</tbody>
</table>
6.0 Conclusion

The 2004 Nokia Brier was a major success, with paid attendance levels higher than any previous Brier. The event provided a considerable economic benefit to the province of Saskatchewan and the city of Saskatoon by boosting the number of travelers to the city during a relatively quiet time of the year in the tourism industry.

The combined expenditures of visitors, along with event operations, and capital expenditures were estimated to reach nearly $13.3 million in the province of Saskatchewan. This spending generated an estimated $23.2 million in economic activity, of which nearly $19.5 million occurred within the city of Saskatoon. More than $3.7 million in wages and salaries were paid in Saskatoon, with an additional $0.8 million paid throughout the rest of the province. The event supported an estimated 205 jobs in Saskatoon, increasing to 238 when considering the province as a whole. In sum, the event contributed more than $11.0 million to the provincial GDP, including $9.2 million in Saskatoon. Hosting the event is estimated to have garnered an additional $3.1 million in taxes; almost $1.5 million for the federal government. Nearly $1.3 million was collected by the province and $347,000 by local governments, including $298,000 by the city of Saskatoon.
Appendix 1: Economic Impact Methodology - STEAM

Background
Briefly, the purpose of STEAM is to calculate both the provincial and regional economic impacts of sport tourism. The economic impacts are calculated on the basis of capital and operating expenditures on goods, services and employee salaries, and on the basis of tourist spending within a designated tourism sector. The elements used to measure the economic impacts are Gross Domestic Product (GDP), Employment, Taxes, Industry Output and Imports. STEAM measures the direct, indirect & induced effects for each of these elements.

Technical Description of the Impact Methodology used by STEAM
STEAM and many other impact studies are been based on input-output techniques. Input-Output models involve the use of coefficients that are based on economic or business linkages. These linkages trace how tourist expenditures or business operations filter through the economy. In turn, the coefficients applied are then used to quantify how tourism related activity in a particular region generates employment, taxes, income, etc. The input-output approach indicates not only the direct and indirect impact of tourism but can also indicate the induced effect resulting from the re-spending of wages and salaries generated.

All impacts generated by the model are given at the direct impact stage (i.e. the "front line" businesses impacted by tourism expenditures), indirect impact stage (i.e. those industries which supply commodities and/or services to the "front line" businesses) and the induced impact stage (induced consumption attributable to the wages and salaries generated from both the direct and indirect impact). In this sense, the model is closed with respect to wages. Imports are also determined within the model, so the model is closed with respect to imports. Exports are not endogenized (i.e. additional exports are not assumed with the induced impact) which consequently generates more conservative impacts. Another assumption of the model, which leads to more conservative impacts, is that not all commodities and/or services purchased are assumed to have at least one stage of production within the province. This assumption is crucial for souvenirs, gasoline and other commodities.

Taxes and employment are key economic impacts and as such must involve the use of both input-output and econometric techniques. As the data embodied in the provincial input-output tables are from 1996 (which is the latest currently available), taxes and employment must incorporate current coefficients and/or rates. These coefficients and/or rates are then applied to measures determined within the input-output framework of the model. Determining the level of taxes and employment outside the input-output framework of the model allows rates and/or coefficients to be selectively changed for updating or in order to conduct a scenario analysis.
Regional (Sub-Provincial) Impact Methodology
The method used to simulate intraprovincial commodity flows and ultimately regional impacts follows directly from regional economics principles. The principle is referred to as the "gravity model". Basically the "gravity model" states that the required commodity (service) inputs will be "recruited" in a manner that takes into consideration economies of scale (i.e. production costs), transportation costs and the availability of specific industries. Economies of scale (i.e. lower production costs) are positively correlated with input demand while greater transportation costs are negatively correlated with input demand. Fulfilling that demand from other provincial regions is contingent on the fact that the specific industry does actually exist. An advantage of using the "gravity model" to simulate intraprovincial commodity flows is that as the industrial composition of the labour force changes, or as new industries appear for the first time in specific regions, the share of production between the various sub-provincial regions also changes.

By following this principle of the gravity model, all sub-provincial regions of a province are assigned a coefficient for their relative economies of scale in each industry (using the latest industry labour force measures) as well as a coefficient to represent the transportation cost involved to get each industry's output to the designated market. One variation on the "gravity model" principle involves the estimation of "relative trade distances" by incorporating different "weights" for different modes of transport. Once these coefficients are generated for all regions and over all industries, a measure of sensitivity (mostly relative to price, but in the case of service industries also to a "local preference criteria") is then applied to all commodities. Another variation on the strict "gravity model" approach is that the measure of sensitivity is adjusted by varying the distance exponent (which in the basic "gravity model" is 2) based on the commodity or service required. The variation in distance exponents revolve, principally, around two research hypotheses: (1) the greater the proportion of total shipments from the largest producer (or shipper), the lower the exponent, and (2) the greater the proportion of total flow which is local (intraregional), the higher the exponent.
Appendix 2: Glossary of Terms used by STEAM

Initial Expenditure - This figure indicates the amount of initial expenditures or revenue 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. An example of this would be the supply and production of bed sheets to a hotel.

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) who benefited either directly or indirectly from the initial expenditures under analysis. An example of induced consumer spending would be the impacts generated by hotel employees on typical consumer items such as groceries, shoes, cameras, etc. An example of induced business investment would be the impacts generated by the spending of retained earnings, attributable to the expenditures under analysis, on machinery and equipment.

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).

NOTE: The multiplier (A), Total/Initial, represents the total (direct, indirect and induced) impact on GDP for every dollar of direct GDP. This is a measure of the level of spin-off activity generated as a result of a particular project. For instance if this multiplier is 1.5 then this implies that for every dollar of GDP directly generated by “front-line” tourism businesses an additional $0.50 of GDP is generated in spin-off activity (e.g. suppliers).

The multiplier (B), Total/$ Expenditure, represent the total (direct, indirect and induced) impact on GDP for every dollar of expenditure (or revenue from a business perspective). This is a measure of how effective project related expenditures translate into GDP for the province (or region). Depending upon the level of expenditures, this multiplier ultimately determines the overall level of net economic activity associated with the project. To take an example, if this multiplier is 1.0, this means that for
every dollar of expenditure, one dollar of total GDP is generated. The magnitude of this multiplier is influenced by the level of withdrawals, or imports, necessary to sustain both production and final demand requirements. The less capable a region or province is at fulfilling all necessary production and final demand requirements, all things being equal, the lower the eventual economic impact will be.

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 broken down by the 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. These figures distinguish between the direct, indirect and induced impact. “Equivalent Full-Year Jobs”, if selected, include both part-time and full-time work in ratios consistent with the specific industries.

NOTE: The multiplier (B) is analogous to Multiplier (B) described earlier with the exception being that employment values are represented per $1,000,000 of spending rather than per dollar of spending. This is done to alleviate the problem of comparing very small numbers that would be generated using the traditional notion of a multiplier (i.e. employment per dollar of initial expenditure).

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. This information is broken down by the direct, indirect and induced impacts.

Imports - These figures indicate the direct, indirect and induced final demand and intermediate production requirements for imports both outside the province and internationally.
Appendix 3 – 2004 Nokia Brier Survey

[A00200] 1 Location of Survey

? 1 Sask Place West Entrance
? 2 Sask Place North Entrance
? 3 Sask Place East Entrance
? 4 Sask Place South Entrance
? 5 Sask Place Concourse
? 6 Sask Place Stands
? 7 Brier Patch
? 8 Other

Pre-Question Script

if (Interview Location < {Other})
Goto "Introduction"   [Q #3]

[A00400] 2 Specify Other interview location

Pre-Question Script

"Hello, my name is _______. I am conducting a survey on the behalf of the organizing committee of the 2004 Nokia Brier to help understand the economic impact this event will have on Saskatoon."

[A00100] 3 May I speak with the person in your visitor party who would be the most knowledgable about your party's spending patterns? Do you have approximately five minutes to answer the survey questions?

? 1 Yes
? 2 No

Post-Question Script

if (Introduction = {No})
Msg: "Thank you anyway, I would just like to ask you three quick questions."
Goto
"Origin Category"   [Q #7]

[A00500] 4 Have you previously been asked questions regarding your spending patterns while at the 2004 Nokia Brier?

? 1 Yes
? 2 No

Post-Question Script

if (Previously questioned = {Yes})
Msg: "Sorry to bother you, thanks for your time"
Quit (Confirm Save,
Confirm Next)
5 What is your primary role at the 2004 Brier?

1 Spectator
2 Participant
3 Coach
4 Volunteer
5 Media
6 Technical Official
7 Other

Pre-Question Script

if (Role < {Other})
  Goto "Origin Category" [Q #7]

6 Specify Other Role:

7 Where is your place of permanent residence?

1 In Saskatoon
2 Not Saskatoon, LESS than 80 km away
3 MORE than 80km away

Post-Question Script

if (Introduction = {No})
  Goto "Total Party" [Q #11]
if (Origin Category < {MORE than 80km away})
  Goto "FSA" [Q #10]

8 What Country do you reside in?

1 Canada
2 USA
3 Europe
4 Asia
5 Other

9 What Province / State do you normally reside in?

1 Ontario
2 Quebec
3 BC
4 Alta
5 Sask
6 Man
7 NB
8 NS
9 PEI
10 NFLD
11 Yukon
12 NWT
13 Nunavut
14 Alabama
15 Alaska
16 Arizona
17 Arkansas
18 California
19 Colorado
20 Connecticut
21 Delaware
22 Florida
May I please have the first three digits of your postal code for statistical purposes? ________________

In TOTAL, how many people are there in your visitor party?  
Answer: ________________

How many members of this visitor party are under the age of 19?  
Answer: ________________

if (Children >= Total Party)  
Msg: "Number of Children greater than total party size"  
Goto "Total Party"
[Q #11]
if (Introduction = {No})
  Quit (Confirm Save, Confirm Next)

[A00F00]  13 What kind of ticket are you using for your seat today
   ? 1 One Draw Pass
   ? 2 Small Package (2 or 3 days)
   ? 3 Full Match Ticket (All draws)

[A00G00]  14 Does everyone in your visitor party have the same type of ticket?
   ? 1 Yes
   ? 2 No

   Pre-Question Script
   if (A00G00=1)
     Goto "Share ticket"  [Q #16]

[A01001]  _________ Number Single Event
[A01002]  _________ Number Short Package
[A01003]  _________ Number Event Package

   Pre-Question Script
   if (Ticket = {One Draw Pass})
     Goto "Sameday"  [Q #18]

[A00V00]  16 Are you sharing these seats with anyone else, or will you be the only person
         occupying these seats?
   ? 1 Only one using seats
   ? 2 Sharing with others

   Pre-Question Script
   if (Share ticket = {Only one using seats})
     Goto "Sameday"  [Q #18]

[A00X00]  17 Please estimate how often, in percent, you will be using these seats
         Answer: _____________

   Pre-Question Script
   if (A00600=1)
     Goto "event days"  [Q #23]

[A00Y00]  18 Are you here on a day trip, or are you staying overnight?
   ? 1 Sameday
   ? 2 Overnight

   Post-Question Script
   if (A00Y00=1)
     Goto "event days"  [Q #23]

[A00H00]  19 How many nights in total have you / do you plan to be away on this trip?
Answer: _____________

[A00Z00] 20 How many nights, in total, will you be spending in Saskatchewan on this trip?

Answer: _____________

Pre-Question Script
if (Tot Nights = 0)
Goto "event days" [Q #23]

[A00I00] 21 How many nights, if any, have you spent / will you spend in the Saskatoon area. By the Saskatoon area, I mean the area highlighted in this map. PROVIDE MAP.

Answer: _____________

Post-Question Script
if (Loc Nights > Tot Nights)
Msg: "Local nights exceed total nights on trip, please re-enter total nights"
Goto "Tot Nights" [Q #19]

[A00N00] 22 How many nights have you / will you spend in paid accommodation while in the Saskatoon area. For example, if you are staying in a private home free of charge for the duration of your stay, enter 0.

Answer: _____________

Post-Question Script
if (Accom Nights > Loc Nights)
Msg: "Accommodation nights greater than local nights. Please re-enter the number of Local nights"
Goto "Loc Nights" [Q #21]

[A00K00] 23 How many days have you / will you attend the Brier at Sask Place?

Answer: _____________

[A00L00] 24 On average, how many draws per day have you / will you attend?

? 1 One
? 2 Two
? 3 Three
? 4 All

Post-Question Script
if (A00600<3)
Goto "Comments" [Q #33]

[A00M00] 25 I would now like to ask you some questions about the spending of your visitor party of [A00D00] people while in the province of Saskatchewan. Is it easier for you to report your spending for the party as a whole on a daily average basis or spending by the party for the duration of the [A00Z00] nights you are staying in Saskatchewan?
26 Expenditure Categories:
(Two Screens)

- Accommodations
- Restaurants
- Briar Patch / Concession
- Groceries / Other Food & Bev
- Admissions / Tickets
- Other Entertainment
- Event Merchandise
- Car Rentals
- Gas, Parking, or Repairs
- Buses or Taxis
- Other Retail / Incidental
- Package Trip

27 How many extra nights, if any, did you / will you spend in Saskatoon as a result of the Brier?
   Answer: _____________

28 Did you change the timing of a trip that you would have taken to Saskatoon within the next six months in order to see the Brier?
   ? 1 Yes
   ? 2 No

29 Would you have paid for some other form of entertainment if your travel party did not attend this event?
   ? 1 Yes
   ? 2 No

30 On a scale of zero to one hundred, with one hundred being the most important, how Important was the 2004 Nokia Briar in your decision to come to Saskatoon?
   Answer: _____________

31 Can you please tell me your age?
   Answer: _____________

32 Gender of respondent (DON'T ASK)
   ? 1 Male
   ? 2 Female

33 Comments:
________________________________________________________________