

2013 Canadian Collegiate Athletic
Association Women's Soccer
National Championship
Surrey, BC

Economic Impact Assessment

Acknowledgements

The 2013 CCAA Women's Soccer National Championship Study is an economic impact assessment of the National Championship that took place November 6-9, 2013, hosted by Kwantlen Polytechnic University in Surrey, British Columbia.

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1.0 Sport Tourism Economic Impact Assessment Pilot – Background

Sport tourism recognizes that people travelling for sport have different motivations than typical leisure or business travellers, but they can be an important source of tourism revenue for communities.

- International tourism receipts (worldwide) totaled \$1.03 trillion in 2011, with an estimated 10% attributed to sport-related travel.
- Sport tourism is a \$3.6 billion segment of Canada's tourism industry and is one of Canada's fastest growing tourism segments.
- Sport tourism is recognized as a stabilizing force within the \$78 billion Canadian tourism industry, especially during times of volatility within the industry (*CSTA, Sport Tourism Cheat Sheet*).

Hosting a sporting event requires a significant investment of resources. Sporting event organizers are often called upon to estimate tourism-related economic impacts to justify their requests for support from private and public sector sponsors. Additionally, when preparing event bids, estimates of economic impact are frequently requested by BC communities to demonstrate return-on-investment, justify use of public funds or gain permission to use venues. However, some of these events are comparatively small, operate on very low budgets and have neither the specialized expertise to implement, nor the funds to purchase, high-quality tourism economic impact studies.

As a result, there are a number of tourism impact studies that generate estimates based on different methodologies and information sources which does not allow the results of studies to be directly comparable to each other. This is why there is a desire within the BC sport tourism community to help BC sporting event organizers produce more credible, consistent and comparable inputs for estimating their tourism economic impact.

When a standard level of consistency and methodology is brought to this important measurement, community organizations developing their event bids can more confidently use economic impact information as part of an event's business case or funding application. This information can also be used by Destination BC and the BC Sport Tourism Network to raise the profile of sport tourism in BC among municipalities and communities, tourism marketing organizations, within the sporting community, and in the provincial government and other agencies.

By adopting a common set of guidelines, sporting event sponsors can achieve a common standard for decision-making. If every event can produce estimates of tourism economic impact that meet the minimum standards set forth herein, a common and credible basis for

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comparisons should emerge. Over time, profiles of spectators of different types of events will be developed. These will serve as useful inputs for forecasting the potential tourism economic impact of sporting events that are still in the planning stages.

Overall Project Objectives

The objective of this project is to conduct economic impact assessments (EIAs) of selected sporting events to begin to establish the value of sport tourism in BC communities and create a standardized and consistent approach to primary data collection for pre and post-event EIAs. This project will assess the economic impact of two key sporting events to provide an initial base of information. At first, it will focus on high-attendance events for province, country or international level competitions. If successful, additional events will be surveyed in subsequent years to develop a matrix of events (e.g. winter/summer, small/large).

By investing in these primary data collection studies, we will be able to more accurately calculate relevant BC sport tourism visitor and event spending profiles. These BC-specific visitor spending and event profiles will then become part of a BC Sport Tourism Inventory Matrix that can be used to assist communities in pre-bid valuation, and can be easily substituted for post-event analysis in an existing economic impact analysis model.

The two primary objectives of this project are to:

1. Conduct economic analyses and impact assessments of two sporting events as pilots to help establish the value of sport tourism in BC communities.
2. Create an inventory/matrix of sport tourism events and associated impacts to assist communities in:
 - a. Pre-bid economic impact estimation
 - b. Post-event economic impact assessment in absence of large-scale primary data collection.

Subsequent reports and tools that are being developed as part of this overall project include:

- An overview report summarizing several BC-specific events including the two pilot events selected as part of this project.
- A detailed framework outlining a BC Sport Tourism Inventory Matrix that will include detail on
 - Event specifics (type, date, budget)
 - Community size/population
 - Participant/spectator estimates (local vs. travellers)
 - Event expenditures
 - Capital

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- Infrastructure
- Operational
- Participant/spectator expenditures (if available – travellers only)
- Economic Impact Analysis results (if available)
- A series of informational/how-to sheets to meet educational and awareness building requirements for distribution to interested communities, event hosts and other sports tourism stakeholders.

This specific report details the EIA conducted on the 2013 Canadian Collegiate Athletic Association (CCAA) Women's Soccer National Championship hosted by Kwantlen Polytechnic University (KPU) at Newton Athletic Park in Surrey, BC.

2.0 Pilot Event: 2013 CCAA Women's Soccer National Championship Background

The 2013 Canadian Collegiate Athletic Association (CCAA) Women's Soccer National Championship was hosted by KPU at Newton Athletic Park November 6-9, 2013, and featured the host team – the Kwantlen Eagles – competing alongside the five CCAA member conference champions, as well as two wild card teams. The seven visiting teams included the Garneau Élans (Québec), the MacEwan Griffins (Edmonton), the Ahuntsic Indiennes (Montréal), the TRU WolfPack (Kamloops), the NAIT Ooks (Edmonton), the Algonquin Thunder (Ottawa), and the Holland Hurricanes (Charlottetown). The eventual champion, the MacEwan Griffins, defeated the Garneau Élans after playing through four days of rain. With eight teams and hundreds of supporters travelling to Vancouver to take part in the National Championship, the tournament also provided a considerable boost in economic activity to the community and province.

In measuring the economic impact of the soccer championship, participants and spectators at the event were surveyed about their roles, community of origin, length of stay, and spending in Surrey, BC. The survey methodology and results are addressed in the next section. Section 3 details the investments made by KPU in hosting the National Championship, while Section 4 reports the STEAM PRO¹ results from the combined expenditures of the participants and

¹The Canadian Sport Tourism Alliance's (CSTA's) Sport Tourism Economic Assessment Model, Professional version (STEAM PRO) was used to generate the economic impact estimates detailed in this report. STEAM PRO, developed in 2006, is designed to incorporate the results of primary data collected from event visitors and the budget/capital expenditures of event organizers and others to prepare economic impact assessments. The model is based on the Canadian Tourism Research Institute's (CTRI - a branch of The Conference Board of Canada) TEAM model, the most widely used tourism economic impact model in Canada. The results of STEAM PRO are fully consistent with the CSTA's STEAM model. A more detailed description of STEAM PRO is contained within Appendix 1.

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spectators, as well as KPU’s operational expenditures. The Appendices include more details about STEAM PRO and a glossary of terms.

3.0 Methodology and Survey Results

Information regarding the volume, composition and spending of spectators at the National Championship was collected through the administration of a face-to-face intercept survey. The survey captured essential information to determine the community of origin of family members and other spectators who came to watch the event. Out-of-town visitors were also asked questions about their visit and expenditures in Surrey. The survey was conducted using iPod Touch PDAs running Survey Analytics’ Survey Pocket software. The survey and methodology were prepared in consultation with the “Guidelines for Measuring Tourism Economic Impact at Gated Festivals and Events,”² to ensure a consistent approach in survey design and economic impact estimation.

Survey Results

Weather during the initial days of the championship was often cold and rainy, which likely impacted the total number of spectators attending the event. However, considering the weather conditions and volume of event spectators, surveyors were able to approach 235 parties, with five refusing to participate (2.1%) and 25 indicating they had been surveyed previously (11%), yielding a total of 205 valid and completed surveys to be used for analysis. Given the slightly lower than anticipated completed surveys, the results of this study should be interpreted with some level of caution.

Table 3.1 Survey Sample Results

Sample Size by Community of Origin		Sample by Role	
Origin	(n)	Role	(n)
Metro Vancouver	139	Participant	24
Vancouver Island	2	Participant family member directly related to participant	66
Other BC	26	Other spectator	51
Other Canada	38	Media	4
Total	205	Official VIP	17
		Other*	42
		Total	204

*The large number of ‘other’ respondents consisted of volunteers, security and bus drivers.

² The “Guidelines for Measuring Tourism Economic Impact at Gated Festivals and Events” are available at: <http://www.destinationbc.ca/Research/Resources-for-Researchers/How-To-Guides.aspx>

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The first step in the analysis was determining the overall attendance at the event. Survey respondents were asked about their role at the National Championship. The total number of family members attending the event was determined by calculating the ratio of family members to participants in attendance. This calculation was done for each of the three distance categories (Metro Vancouver, BC and out-of-province), and indicated that overall 2.2 family members were in attendance for each participant. The organizers indicated that the average team size was 25 people (for a total of 200 participants), with one local team, one team from within BC and six teams from outside of the province. Combining these figures with the spectator ratio suggests a total of 440 family spectators who watched the event.

The second key ratio in calculating the attendance at the National Championship was the ratio of non-family spectators to family spectators. As one would expect, this varied widely from 1.1 non-family spectators for every family spectator from the Lower Mainland, to 0.1 for out-of-province. This calculation suggests there was a total of 123 non-family spectators watching the game, for a total of 560 spectators. This result is consistent with the total sales of 407 tickets. (Note that those aged 18 and under [approximately 13% of spectator visitor parties] as well as KPU students were not required to purchase tickets.)

Table 3.2 Event Origin

	Participants	Family / Participant Ratio	Total Family Members	Other Spectator/ Family Ratio	Total Other Spectators	Other (Volunteer & VIP)	Total Other	Grand Total
Local	25	2.92	73	1.07	78	0.87	68	244
Other BC	25	1.79	45	0.20	9	0.80	7	86
Out of Province	150	2.14	321	0.11	36	0.70	25	532
Total	200	2.20	439	0.28	123	0.81	100	862

Respondents were asked a variety of other questions during the survey. The average party size was 2.2 people, with the size increasing with the distance travelled from home. The survey found that visitors from the Lower Mainland were more than twice as likely to travel with their children as compared to out-of-town visitors. The average out-of-town visitor spent more than three days at the National Championship, compared to 2.5 nights for Lower Mainland residents. (Table 3.3).

Table 3.3 Trip Details

	Metro Vancouver (n=130)*	Other BC (n=21)	Other Can (n=28)	Average**
Party size	1.8	2.0	2.5	2.2
Share attending with children under 18	17%	6%	5%	9%
Avg. days at Event	2.5	3.8	3.5	3.2

*excludes participant visitor parties

**weighted using overall attendance weight

Visitor Spending

Out-of-town visitors (non Metro Vancouver residents) were asked detailed questions about their trip to BC and Surrey. Overall, only 4% of respondents made day trips to Surrey (i.e. some out of province stayed overnight in other parts of Metro Vancouver). The most commonly used accommodations can be found in Table 3.4.

Table 3.4 Accommodation Use & Length of Stay

	Day trips Only	Overnight Friends & Family	Overnight - Host Hotel	Overnight Other Hotel	Overnight Other	Total Nights
BC (n=28)	12%	29%	32%	22%	5%	4.3
Other Canada (n=38)	2%	6%	68%	24%	0%	4.7
Overall	4%	10%	62%	24%	1%	4.6

The average overnight length of stay was relatively similar for BC and out-of-province respondents, ranging from 4.3 to 4.7 nights.

Respondents were also asked about their spending while in Surrey, with the average visitor spending \$483 per person.

Table 3.5 Visitor Spending per Person

	Other BC	Other Canada	Average
Accommodation	\$185.94	\$139.94	\$158.58
Restaurant	\$141.60	\$122.80	\$130.62
Grocery/Other Food & Beverage	\$34.18	\$34.05	\$34.10
Recreation & Entertainment	\$21.53	\$37.98	\$31.12
Shopping	\$54.59	\$80.40	\$69.63
Car Expenses	\$125.76	\$95.50	\$107.89
Total	\$563.59	\$510.67	\$531.93

The final step in the analysis was to multiply the estimated number of visitors with the average spending per visitor, to determine the overall visitor spending in Surrey.

Combining the attendance estimates of Table 3.2 with the average spending per person from Table 3.5 shows the aggregate spending made by spectators at the National Championship was \$229,000 (Table 3.6).

Table 3.6 Aggregate Visitor Spending*

	All BC	Other Canada	Total
<i>Visitors</i>	<i>61</i>	<i>382</i>	<i>443</i>
Accommodation	\$11,342	\$53,459	\$64,801
Restaurant	\$8,638	\$46,909	\$55,547
Grocery/Other Food & Bev	\$2,085	\$13,006	\$15,091
Recreation & Entertainment	\$1,313	\$14,507	\$15,820
Shopping	\$3,330	\$30,712	\$34,042
Transportation Expenses	\$7,671	\$36,482	\$44,153
Total	\$34,379	\$195,075	\$229,454

*In most cases, the aggregate expenditure is adjusted by the importance of the event in the respondent’s travel decision. In this event, the attribution factor was 98% for BC respondents and 97% for respondents from outside BC; thus, all expenditures were included.

The final stage in the analysis was to include the spending made by the teams while they were in Surrey, as part of the overall visitor expenditures. Teams were responsible for their own expenses with the exception of transportation to and from the airport, breakfast each morning

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of the tournament (included in their hotel rate) and the opening banquet dinner. Most teams booked two players to a room, with at least two additional rooms for coaches. All of the teams stayed six nights. One team (TRU) bussed to the tournament with their own chartered transportation. A second team arranged for charter bus service locally during the tournament (through the Sheraton Guildford) while the remaining five out-of-town teams rented mini-vans through a Surrey-based location. In total, the participants at the National Championship are estimated to have spent an additional \$141,000 in the local economy.

4.0 Operational Expenditures

Operations

An analysis was also conducted of the operational expenditures made by KPU in hosting the National Championship. The total expenses associated with the event was \$71,200,³ which was spent on a variety of goods and services such as the team banquet, souvenirs, merchandise and player packages, officials expenses, and a wide variety of other goods and services needed to host the event.

5.0 Economic Impact Results

The National Championship attracted hundreds of visitors to Surrey. Visitor spending, as well as the expenditures made by KPU in hosting the event, totalled \$442,000. This generated a net economic activity (GDP)⁴ of \$461,000 in the BC, of which \$277,000 occurred in Surrey. These expenditures supported \$306,000 in wages and salaries in the province and an estimated seven jobs, of which six jobs and \$208,000 in wages and salaries were in Surrey.⁵ The total economic activity (industry output) supported by the event was \$963,000, with \$650,000 occurring in Surrey (Table 5.1).

The total tax revenues supported by the National Championship reached \$219,000. Of this total, \$98,000 was attributable to the federal government while provincial tax revenues reached \$78,000 and municipal taxes were \$43,000, of which \$35,000 were in Surrey.

³ The CCAA Licensing fee was excluded, as this was not spent in Surrey.

⁴ Gross Domestic Product (GDP) or net economic activity is the measure of the net total of goods and services produced in the economy resulting from the initial expenditure under analysis (i.e. considers only the value added) associated with the event.

⁵ Jobs reported in this study refer to the total number of jobs supported, not full-time equivalent jobs (FTE). For example, two people working half time would represent two jobs but would represent only one FTE.

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Table 5.2 shows the breakdown of the economic impact by the source of expenditure. Visitor spending was approximately 82% of the total expenditures associated with the event, with the economic impact being a similar proportion.

Tables 4.3 and 4.4 illustrate the economic impact arising from the spending of out of province visitors and the operational expenditures only. This level of analysis is appropriate when measuring the net benefit to the province as a whole in hosting the event.

Table 5.1 Total Economic Impact

	Total BC	Local Area Surrey	Rest of BC
Initial Expenditure	\$441,763	\$441,763	\$0
Gross Domestic Product			
Direct Impact	\$154,555	\$154,555	\$0
Indirect Impact	\$179,051	\$64,755	\$114,297
Induced Impact	\$127,182	\$57,522	\$69,660
Total Impact	\$460,789	\$276,832	\$183,957
Industry Output			
Direct & Indirect	\$707,006	\$534,026	\$172,980
Induced Impact	\$255,867	\$115,743	\$140,124
Total Impact	\$962,873	\$649,769	\$313,104
Wages & Salaries			
Direct Impact	\$117,545	\$117,545	\$0
Indirect Impact	\$108,943	\$53,202	\$55,742
Induced Impact	\$79,414	\$37,002	\$42,412
Total Impact	\$305,902	\$207,748	\$98,154
Employment (Full-year jobs)			
Direct Impact ⁶	3.4	3.4	-
Indirect Impact	2.1	1.1	1.0
Induced Impact	1.7	1.1	0.6
Total Impact	7.3	5.7	1.6
Taxes (Total)			
Federal	\$97,638	\$66,392	\$31,246
Provincial	\$78,111	\$56,037	\$22,074
Municipal	\$43,299	\$35,361	\$7,937
Total	\$219,048	\$157,790	\$61,258

⁶ Direct employment impact is generally extra shifts or overtime for existing workers rather than new employment.

Table 5.2 – Economic Impact by Source

Provincial Economic Impact	Visitors	Operations	Total
Initial Expenditure	\$370,584	\$71,179	\$441,763
Gross Domestic Product	\$386,067	\$74,722	\$460,789
Wages & Salaries	\$255,983	\$49,919	\$305,902
Employment (Full year jobs)	6.3	1.0	7.3
Total Taxes	\$192,779	\$26,269	\$219,048
Industry Output	\$810,351	\$152,521	\$962,873

Table 5.3 Economic Impact of Out-of-Province Visitors and Operations only

	Total BC	Local Area Surrey	Rest of BC
Initial Expenditure	\$389,743	\$389,743	\$0
Gross Domestic Product			
Direct Impact	\$133,632	\$133,632	\$0
Indirect Impact	\$160,610	\$58,635	\$101,975
Induced Impact	\$112,265	\$50,651	\$61,614
Total Impact	\$406,507	\$242,918	\$163,589
Industry Output			
Direct & Indirect	\$623,104	\$471,425	\$151,678
Induced Impact	\$225,804	\$101,896	\$123,908
Total Impact	\$848,908	\$573,322	\$275,586
Wages & Salaries			
Direct Impact	\$101,789	\$101,789	\$0
Indirect Impact	\$98,059	\$48,017	\$50,043
Induced Impact	\$70,081	\$32,557	\$37,525
Total Impact	\$269,929	\$182,362	\$87,567
Employment (Full-year jobs)			
Direct Impact ⁷	3.0	3.0	-
Indirect Impact	1.9	1.0	0.9
Induced Impact	1.5	1.0	0.5
Total Impact	6.4	4.9	1.5
Taxes (Total)			
Federal	\$85,803	\$58,026	\$27,777
Territorial	\$68,410	\$48,800	\$19,610
Provincial	\$37,582	\$30,498	\$7,084
Total	\$191,795	\$137,324	\$54,471

⁷ Direct employment impact is generally extra shifts or overtime for existing workers rather than new employment.

Table 5.4 – Economic Impact by Source – Out-of-Province Visitors and Operations

Provincial Economic Impact	Visitors	Operations	Total
Initial Expenditure	\$318,564	\$71,179	\$389,743
Gross Domestic Product	\$331,786	\$74,722	\$406,507
Wages & Salaries	\$220,010	\$49,919	\$269,929
Employment (Full year jobs)	5.4	1.0	6.4
Total Taxes	\$165,526	\$26,269	\$191,795
Industry Output	\$696,386	\$152,521	\$848,908

Appendix 1: Economic Impact Methodology – STEAM

Background

The purpose of STEAM is to calculate both the provincial and regional economic impacts of sport tourism. The economic impacts are calculated based on capital and operating expenditures on goods, services and employee salaries, and 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 and induced effects for each of these elements.

Technical Description of the Impact Methodology used by STEAM

STEAM (and many other impact studies) are based on input-output techniques. Input-output models involve the use of coefficients based on economic or business linkages. These linkages trace how tourist expenditures or business operations filter through the economy. The coefficients applied are then used to quantify how tourism-related activity in a particular region generates areas such as employment, taxes and income. 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 frontline businesses impacted by tourism expenditures), indirect impact stage (i.e. those industries which supply commodities and/or services to the frontline 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 considerations. However, as these concepts fall outside the Canadian System of National Accounts - Provincial input/output tables, their impacts must be calculated separately. Current tax and employment data for each region is used to econometrically estimate a series of coefficients and rates. These coefficients and/or

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rates are then applied to measures determined within the input-output framework of the model, yielding the final tax and employment figures.

Regional (Sub-Provincial) Impact Methodology

The method used to simulate intraprovincial commodity flows and ultimately regional impacts follows directly from regional economic principles. The principle is referred to as the gravity model. Basically the gravity model states that the required commodity (and service) inputs will be "recruited" in a way 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 to 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 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

Direct Impact - Relates ONLY to the impact on frontline 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.

Employment - Depending on 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).

Gross Domestic Product (GDP; net economic activity) - 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, it implies that for every dollar of GDP directly generated by frontline tourism businesses, an additional \$0.50 of GDP is generated in spin-off activity (e.g. suppliers).

The multiplier (B), Total/\$ Expenditure, represents 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. As 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

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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.

Imports - These figures indicate the direct, indirect and induced final demand and intermediate production requirements for imports both outside the province and internationally.

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) that 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 or cameras. 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.

Industry Output (total economic activity) - These figures represent the direct and 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 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.

Initial Expenditure - This figure indicates the amount of initial expenditures or revenue used in the analysis. This heading indicates the total magnitude of the spending, as well as the region in which it was spent (thus establishing the "impact" region).

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.

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.