Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated, Permanent Attractions

Submitted to:

Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative

and

Tourism British Columbia

Submitted by:

Research Resolutions & Consulting Ltd.

March 2007

(Revised)

Table of Contents

I. WHAT IS THIS GUIDEBOOK ALL ABOUT?

A. Introduction

1. Background

Attraction managers are often called upon to make estimates of tourism-related economic impacts to justify their requests for support from private and public sector supporters. Many of these attractions are comparatively small, operate on very low budgets and have neither the skilled staff to implement nor the funds to purchase high quality tourism economic impact studies. The result is a proliferation of tourism economic impact studies that generate estimates that are not credible. All too often, the estimates are inaccurate, at least in part because the manner in which information is collected and projected does not meet acceptable research standards.

This manual complements other documents in a "family" of products. It is based on *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated Festivals and Events*. The original materials were designed for event and festival organizers and are available under separate cover. They were supported by a variety of tourism organizations.[1]

2. Goals

The attraction-oriented guidelines are designed to enable managers of permanent attractions including museums, galleries and historic sites across North America to produce more credible and consistent inputs for estimating their **tourism economic impact**[2]. A new level of consistency and professionalism will be brought to this important measurement task as attraction managers adopt the guidelines as *minimum standards*.

Attractions that elect to measure other characteristics such as **attendee satisfaction** and/or **profile information** will also benefit from the application of the procedures and minimum standards described in these guidelines. A further goal of the original project for events and festivals was to explore alternative ways to estimate the value of an event or festival. To this end, a discussion paper on approaches to estimating non-market values was prepared (available under separate cover). This document covers topics such as *willingness to pay* (WTP), and other forms of *revealed* or *stated preference* in the context of events and festivals.

[1] See the Appendix I for a list of funding and supporting partners for the original project.

[2] These guidelines are designed to allow organizers of small and medium sized attractions to produce credible estimates of tourism economic impact with limited assistance from professional consultants. Consequently the guidelines include some "rules of thumb" and simplifications that would not be appropriate for all studies.

3. A focus on "tourists"

In effect, the spending estimates and economic benefits discussed in these Guidelines are limited to those that are deemed "touristic". They focus on how to generate *inputs* for estimating tourism economic impact but do not include economic impact models *per se*.

Tourism economic impact

Tourism economic impact is the *change* in sales, income and jobs in businesses or agencies that receive tourists' spending directly, indirectly or as a result of household expenditures, from the income earned directly or indirectly because tourists came to the community and spent money there.

The tourism economic impact of an attraction takes into account **incremental spending** by tourists who travel from outside the community and go to the attraction. Incremental spending is money that is spent at or because of the attraction *that would not otherwise* have been spent in the community.

It does *not* include spending associated with the attraction by people who live in the community (*locals*). A tourism economic impact assessment is most appropriate for attractions that attract at least ten percent of their total attendance from *tourists* – people who do not live in area in which the attraction is located.

4. Your attraction may generate only a "share" of tourism economic impact in the community.

In many destinations, the tourist has a variety of attractions and activities from which to choose. If tourists go to your attraction and *other attractions* in your community while on the same trip or came to the community to engage in activities unrelated to any attraction, your attraction will need to "share" the tourism economic impact with these other attractions and/or activities. In these guidelines, the tourist's appraisal of **how much influence** your attraction and other attractions and activities had in the decision to visit your community is the basis for helping to estimate the "share" your attraction can claim of tourist spending.

5. Partners

The Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative and Tourism British Columbia provided financial support for modifying the original guidelines for events and festivals to reflect the measurement requirements of permanent attractions. Supporters of the original guidelines and the panel of experts in Canada and the United States who developed them are listed in Appendix I (under separate cover).

6. Benefits to funding organizations

By adopting these guidelines, attraction supporters can achieve a common standard for decision-making. If every attraction produces estimates of tourism economic impact that meet the minimum standards set forth herein, a common and credible basis for comparisons should emerge. As well, over time, profiles of attendees of different types of attractions will be developed which may be useful as inputs for forecasting the potential tourism economic impact of various types of attractions.

7. Benefits to attraction managers

Attraction managers will have tools that enable them to (1) determine whether they are in a position to undertake a tourism economic impact assessment or to select other options to estimate their value and (2) to conduct the tasks required to feed economic impact models with the inputs required to produce consistent and credible estimates of the touristic value of their attraction.

B. Basic questions you should ask

1. What is "tourism economic impact"?

The **tourism economic impact of an attraction** is an estimate of the change in economic activity that results from ***tourists*** who come from outside the community to go to an attraction. If your local newspaper were reporting *tourism economic impact*, it would print something like the following:

> *ABC Museum brought _____ thousands of tourists to the city. These tourists generated $_____ thousands in economic impact, _____ hundreds of jobs for the community, and added $_____ thousands to the local tax coffers.*

The numbers used to fill in the blanks in this statement represent the results of a tourism economic impact estimation process based on *tourists* who went to ABC Museum. The tourism economic impact of an attraction takes into account **incremental spending** by tourists who travel from outside the community and go to the attraction. Incremental spending is money that is spent at or because of the attraction *that would not otherwise* have been spent in the community.

Tourism economic impact is the ***change*** in sales, income and jobs in businesses or agencies that receive tourists' spending directly, indirectly or induced as a result of household expenditures, financed from the income earned directly or indirectly because tourists came to the community and spent money there.

2. Why is *incremental* spending such an important concept?

The purpose of a tourism economic impact estimate is to gauge the impact on an economy of a particular attraction or activity. If the same money that is spent at or as a result of an attraction would have been spent in the community on other activities, goods or services, the attraction is not deemed to be responsible for the spending. In other words, some of the spending that takes place at an attraction is *not* incremental – it would have happened anyway.

For example, while visiting your community, Dave and Diane decide to go to your attraction instead of going to a movie at the local theatre. Suppose that the ticket price for your attraction and the movie are the same. In this case, the purchase of tickets for your attraction would produce *no* incremental spending. Why? Because Dave and Diane would have spent the *same amount* of money in your community on a recreational activity (either your attraction or the movie) – whether your attraction were available or not[3].

3. Tourism economic impact is *different* from how much money was spent by tourists

The economic impact of tourists' activities in a community is not the same as how much tourists spent in the area. In fact, since most communities import goods and services in order to meet tourists' local demands, not all of the benefits from tourists' spending in a community will be retained within that community. For this reason, in many communities, *tourist spending* can be higher than *tourism economic impacts.*

4. Are there other ways to measure the success of an attraction?

Yes. There are many ways to evaluate the "success" of an attraction. A tourism economic impact estimate is only one. For example, an attraction manager might wish to estimate *non-monetary* impacts on the community such as the value of maintaining community pride, education, cultural traditions, and the like. While these approaches can be useful, the materials provided here are primarily related to methods to collect data needed to estimate the *incremental* economic impacts tourists at an attraction bring to a community, province, territory, state or country.

5. Should every attraction measure its tourism economic impact?

No. Gathering appropriate information to produce credible estimates of an attraction's tourism economic impact takes time and effort. Every attraction manager should weigh the benefits and costs of undertaking the steps required before making a decision. If, for example, your attraction matches one of the following descriptions, it is probably not worthwhile to invest the necessary time and effort:

[3] This assumes that the indirect and induced impacts are the same in each case. These guidelines are based on the assumption that any difference in the indirect or induced impacts is inconsequential.

(1) if the attraction draws few, if any, people from outside the community (i.e., less than 10% of total attendees are tourists); or

(2) if most of the tourists who go to the attraction are in the community for a reason ***other than*** *attending the attraction* (the economic impact associated with the attraction is linked to how important it was in the decision to visit the community -- see Section II-A-6 for more details).

6. Why would an attraction want to estimate its *tourism* economic impact?

If you want to know how much *new* economic activity (Gross Domestic Product or GDP), how many *new* jobs and how many *new* tax dollars came into your community because tourists came to your attraction, you might want to estimate its *tourism* economic impact. In other words, a tourism economic impact estimate quantifies the *incremental impacts* brought to a community because your attraction drew these tourists to your destination.

Estimates of the contribution your attraction made to the overall economy of the community (GDP), how many jobs it created and how much it contributed to the tax coffers of the community (or other jurisdictions) because it took place **and** attracted tourists can be used for planning, to generate community support and for other purposes.

7. Tourism economic impact estimates for attractions should span the entire operating year.

Even though there may be times of the year when more tourists come (e.g., summer) than is the case in other times of year (e.g., winter/shoulder months), an attraction's tourism economic impact estimate should reflect tourism activity throughout the operating season (e.g., an attraction that operates for 12 months would have a 12 month operating season; if open from May through October, it would have a five month operating season).

If an attraction were to measure tourism economic impact only in the "peak tourism season" and extrapolate this to the full operating year, it would likely *over-estimate* the impact because it would over-estimate the proportion of its attendees who are "tourists". To avoid this possibility, these guidelines are designed for permanent attractions to estimate the tourism economic impact over the full course of their operating year.

8. Check with sponsors and partners before deciding what to measure!

Some attraction supporters are especially interested in the *tourism* impacts of attractions whereas others are interested in different information, such as sponsor name recognition, visitor satisfaction, visitor characteristics and so on. Make sure that the estimates you produce will meet the needs of potential attraction supporters before you design and implement a measurement plan.

9. What steps does an attraction organizer have to take to estimate tourism economic impact?

See the description on pages 16 through 20 and Figures 1 (page 18) and 2 (page19) for the various steps required to generate inputs for a tourism economic impact estimate.

10. Where can you learn more about tourism economic impact measurement?

There are many guidelines available to help organizations learn more about tourism economic impact measurement. Some provide less stringent measurement tools than the ones recommended here but are, nonetheless, useful sources of background information. Possible sites that may be of use include the National Recreation and Park Association (NRPA.org), Michigan State University (MSU.edu - see Daniel Stynes), and economic development offices at the provincial, state or local level.

11. Do you need to hire research experts?

You may find that the technical aspects of sampling, weighting, data management and projection are too complex to take on without the help of research and tabulation experts. If this is the case, you might use these guidelines to develop a Terms of Reference to obtain proposals from local market and economic research suppliers and/or provide these guidelines to your supplier for implementation of the project.

12. Where else can you obtain help?

You can explore options for help in implementing the methods described in these guidelines from faculty members in tourism, economics or social science departments at a local college or university, your supporters and/or partners (if any), and members of research professional organizations such as the Travel and Tourism Research Association (TTRA, www.ttra.com), Marketing Research and Intelligence Association (MRIA, www.mria-arim.ca) or Marketing Research Association (U.S.A.) (MRA,, www.mra-net.org). These organizations maintain lists of members who may be able to meet your needs.

13. What do you need to estimate your attraction's tourism economic impact?

a) Money

The guidelines recommend the collection of information directly from attraction attendees, using surveys and surveys cost money. Even if you plan to train and use volunteers to *collect* the information, you may incur costs for some or all of the following: printing (forms/questionnaires), hand-held computer rental or purchase, long distance telephone charges for telephone call-backs, data processing, tabulation and/or analysis.

You may also require the services of professional research and tabulation experts for some of the more complex components of the survey tasks (e.g., sampling, weighting, data management and projection).

b) Human resources

Someone has to be "in charge" to make sure that all the elements required to conduct a successful survey at an attraction are in place. The process requires project management and the commitment of sufficient human resources to ensure a positive outcome.

The counting, tallying and telephone callback procedures recommended in these guidelines also require trained interviewers. These may be volunteers from the community who are trained to conduct the surveys or professionally trained interviewers supplied by survey research companies.

c) A tourism economic impact model

A tourism economic impact model is an econometric tool that utilizes the structure of a region's economy, generally based on national statistical organizations' data (such as input/output tables) and provides estimates of the impact tourists' spending has on overall economic activity, jobs and taxes.

The guidelines provided here will help you produce appropriate *inputs* for tourism economic impact models but you need to ensure that a national, provincial/state or regional economic development office or other organization has a model available for you to use.

The Department of Canadian Heritage is developing an economic impact model for arts and heritage that can be used to estimate the economic importance of an attraction. This model is designed for estimates at the provincial or territorial level. Other options include regional tourism economic impact models developed by individual provincial jurisdictions (contact your provincial, territorial or state tourism marketing destination office [DMO] or local economic development office to determine if an appropriate model is available).

d) A medium-term research plan

To determine *what* you want to learn about your attendees and *how often* you can afford to conduct a survey, you may want to develop a medium-term (five-year) research plan. Depending on your budget and human resource limitations, you may decide to conduct a full-blown survey occasionally and more limited surveys in the intervening years. You can also use the procedures described in this document to conduct studies that focus on subject areas other than tourism economic impacts. Other subjects might include awareness and marketing, visitor characteristics, or visitor satisfaction.

e) The impact area

At what level of geography do you plan to estimate the tourism economic impact of your attraction (i.e., national, provincial, regional, or local)? You will ask different questions and include/exclude different spending, depending on the level of geography you select as the basis of your tourism economic impact estimates. Your impact area might be a county or similar administrative geographical area, a group of counties, a tourism region, a city, a province, territory or state, etc. We recommend that you use geographic boundaries that correspond to standard economic and/or census areas because economic impact models are generally designed to reflect the economic structure of particular census areas.

When selecting the level of geography, make sure a tourism economic impact model is available at the same level. For example, if you plan to look at your attraction's impact on the municipal economy, you will need a tourism economic impact model that reflects the structure of the municipal economy.

If no such model exists, consult with your local economic development office or tourism authority to identify the implications of using a model reflecting a different level of geography than the one you have selected. As noted previously, the economic impact model for arts and heritage being developed by the Department of Canadian Heritage is designed to estimate tourism economic impact at the provincial/territorial level.

f) Local partners

Perhaps your attraction can't "go it alone", but if you worked with other attractions in your area and/or the local destination marketing organization, you could build a partnership to spread the financial and human resource costs.

g) Enough tourists

If your attraction is unlikely to attract at least ten percent (10%) of its attendees from outside the local area, you should probably ***not*** undertake a tourism economic impact assessment. Unless your attraction is very large, such a small proportion of tourists (less than 10%) will likely have a minimal economic impact on your community. Furthermore, *finding* enough of these tourists to produce credible estimates from a survey would likely require more effort than many attractions can manage.

h) A reality check

Not every attraction will have budget, human resources, and/or access to a suitable tourism economic impact model. Be prepared to conclude that your attraction cannot support the effort required to generate inputs for assessing tourism economic impacts that meet *minimum standards*. If your attraction falls into this category, you may select other measures to describe the benefits your attraction brings to a community and to generate support for the attraction.

II. DESIGNING A TOURISM ECONOMIC IMPACT STUDY

C. Important concepts

1. Attraction type

If the attraction occupies a confined area with "gates" or other "controlled" points of entry/exit, use these guidelines. They are NOT designed for use at attractions that have "uncontrolled" points of exit or entry. A sculpture garden in an unfenced area such as a park is an example of a permanent attraction in which public access is "uncontrolled".

Sampling procedures refer to the methods you will use to identify the subset of attendees and/or tourists that will be interviewed at your attraction. ***Projection procedures*** refer to how you will use the information collected from the subset (sample) of attendees included in the research process to estimate the characteristics of *all* attendees and/or *all* tourists who came to your attraction.

2. How many *locals* and how many *tourists* came to the attraction?

You will need to know how many *locals* and how many *tourists* came to your attraction. Local residents may represent the majority of attraction attendees, but their spending should be *excluded* from tourism economic impact assessments.

An **on-site tally** is the recommended method of identifying how many attendees are *tourists* and how many are *local residents*. By intercepting a random sample of attraction attendees as they enter and asking them a few questions, you will be able to determine the proportion of tourists (in total and by various origin markets) and the proportion of local residents. The on-site tally process can also include additional questions that will aid in developing appropriate inputs for a tourism economic impact assessment.

Guest book entries are *not* suitable substitutes for tallying entrants to an attraction because the people who elect to sign a guest book may be quite different from those who do not, creating the possibility that the "sample" of entries is not representative of *all* attraction attendees. For example, *tourists* may be more inclined to sign a guest book than are *residents* of the local community.

3. What is a *tourist?*

The manner in which the World Tourism Organization's guidelines for the *tourism* component of *travel* is operationalized for measurement purposes varies from country to country. Attraction managers should check with the appropriate authorities to determine the operational definition in use in their particular jurisdiction. The operational approach adopted by Canada for identifying tourists is provided below.

An **overnight domestic tourist** is one who claims to have taken an *out-of-town* trip of at least one night away from home for any purpose apart from commuting to work or school, moving to a new residence, routine trips (shopping, medical, religious observance, pick-ups/deliveries, service/sales calls or other routine work-related trips). The trip must be completed within 365 days.*

A **same-day domestic tourist** is defined in a manner similar to the overnight tourist but the out-of-town trip must take the traveller at least 40 kilometres (25 miles) one-way from home and be completed within less than 24 hours.*

A **same-day or overnight international tourist** is one who crosses an international boundary (e.g., from the USA to Canada) on a trip for any purpose, excluding commuting to work or school, on military or diplomatic or as a member of a crew.** The trip must be completed within 365 days.

*Different distance criteria are used in different countries. **Some other minor exclusions apply.

4. Who is <u>your</u> tourist?

Identifying the **Impact Area** or setting geographical boundaries for who is or is not a *tourist* from a measurement perspective requires that you have a clear understanding of the geographical area in which you want to assess the incremental economic impacts generated by *tourists.*

For example, if you want to estimate the tourism impact on a particular community within the province, territory or state, you would consider residents of the province/territory/state who live outside the particular community in which the attraction is situated to be *tourists.* Only residents of the particular community who attended the attraction would be "local".

Within tourism economic models, special adjustments may be made to estimate indirect and induced spending by *locals.* As noted elsewhere in these guidelines, the focus here is on *direct* spending impacts.

5. Substitution effects

Would attendees have spent the "same" money elsewhere in the community if your attraction were not available? Remember, a tourism economic impact assessment measures the impact of *incremental spending* associated with an attraction. This is spending that would not have taken place if your attraction were not available. For example, if Dave and Diane decided to go to a movie or a different attraction instead of going to your attraction, and if admission prices for the movie or other attraction were the same, your attraction would have produced *no* incremental spending. Why not? Because Dave and Diane would have spent the *same amount* of money in your community on a recreational activity – whether your attraction were available or not (*substitution effects*) [4].

[4] Recall we are assuming that any difference in the indirect or induced impacts are likely small and can be safely ignored.

Whether the expenditure at your attraction by Dave and Diane just "substituted for" an equivalent expenditure they would have made elsewhere in the community is central to what tourism economic impact estimates are designed to provide: incremental impacts of an attraction on the economy. A survey is required to find out what Dave and Diane would have done if your attraction were *not* available.

Since most communities have more than one permanent attraction and offer tourists a variety of activities that might influence why made a trip to the particular community, a tool is necessary to estimate what "share" of economic activity should be associated with your attraction. For example, if the community has an art gallery, a general history museum and a heritage site, one tourist might go to all three whereas another tourist might go to only one. Similarly, none of the attractions in the community might have influenced the destination decision – the tourist could have made the decision to visit because he or she wanted to visit with family or friends, have a business meeting, see the natural sites in the area, etc. The **amount of influence** your attraction had on the decision to select your community as a trip destination is the basic construct used to *apportion* economic activity to specific attractions.

6. The importance of your attraction in the tourist's *destination choice* ("Casuals")

Once you know how many *tourists* came to your attraction, you have to identify how important your attraction was in their decision to visit the destination (area of geography you selected – community, region, province, territory, state, country) or whether your attraction caused them to extend their stay. If they would have come to your community whether or not your attraction were available, their spending is treated differently than if they came *because* of your attraction.

D. Four components to a tourism economic impact study

Four components are required to produce inputs for an estimate of the tourism economic impact of your attraction (see Figure 1, page 20):

1. A systematic approach to obtain **Attendee Counts** to estimate total attendance;

2. **Attendee Tallies** to identify the proportions of attendees from various places of residence;

3. An **Attendee Survey for Tourists** to capture spending, the influence of your attraction in the tourist's destination choice, time switchers, and other characteristics of attendees; and

4. An **analysis plan** to identify which spending accrues to the attraction and which does not and to weight and project sampled attendees to all attendees.

1. Counting & tallying attendees

Details regarding how to count and tally attendees at attractions are provided in Section III-B/C. Sample Tally materials are provided in Appendix VI (under separate cover).

2. Attendee survey

There are two basic approaches to identifying the spending inputs for a model to estimate the tourism economic impact of an attraction.

Recommended: An **attendee survey** to capture characteristics and spending information from your attraction's attendees (primary estimates of on-site and tourist spending in the community).

Not Recommended: Average tourist spending estimates for *generic tourists* to the destination from a reliable and accepted source (secondary estimates of tourist spending) could be used in lieu of utilizing an Attendee Survey, but this approach is not recommended.

We recommend that **primary estimates** (using an attendee survey) of tourism spending be used where feasible for the following reasons.

- You learn about your *own* tourists. Their characteristics, including what they spend money on and how much they spend may be quite different from the "average" tourist to a destination. Spending estimates can be adjusted according an individual's assessment of the importance of the attraction in the destination choice .

- Additional information useful for planning and marketing such as satisfaction and repeat attendance can be extracted from the same primary survey.

Telephone or e-mail **follow-up** with respondents who accepted an Attendee Survey will likely be required to increase response rates for the important spending information. Telephone numbers and/or e-mail addresses of those to whom questionnaires are distributed at the tally stage will be collected. The follow-up contact could take the form of a simple reminder. If, however, the respondent no longer has a copy of the questionnaire, the follow-up process could involve administering the interview over the telephone or via a Web-based survey or mailing out another copy of the questionnaire.

Details about how to conduct an Attendee Survey are provided in Section III. Sample attendee questionnaires are provided in Appendix VII (under separate cover).

Figure 1
PARALLEL SURVEY PROCESS COMPONENTS TO GENERATE INPUTS FOR TOURISM ECONOMIC IMPACT ESTIMATES

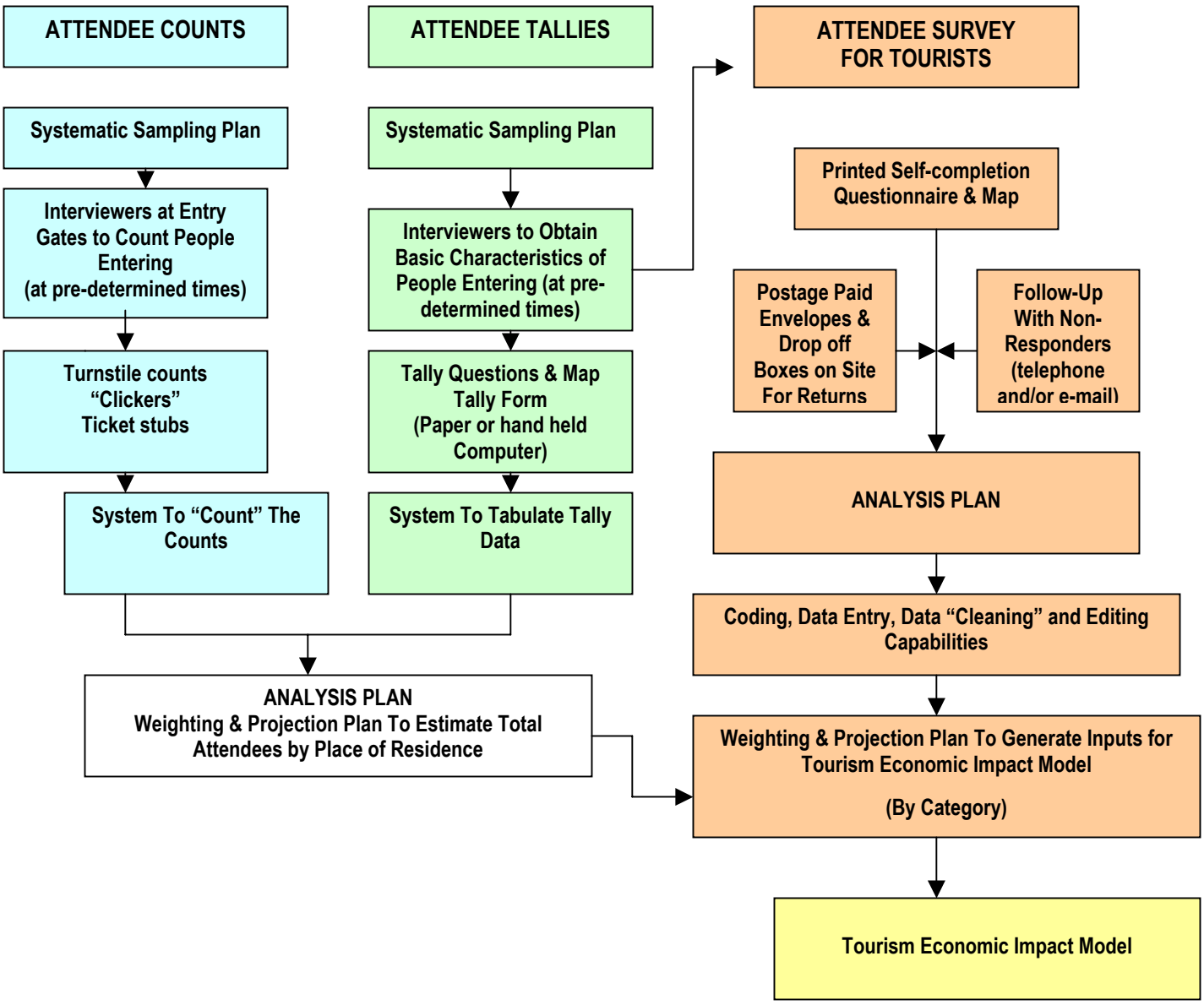
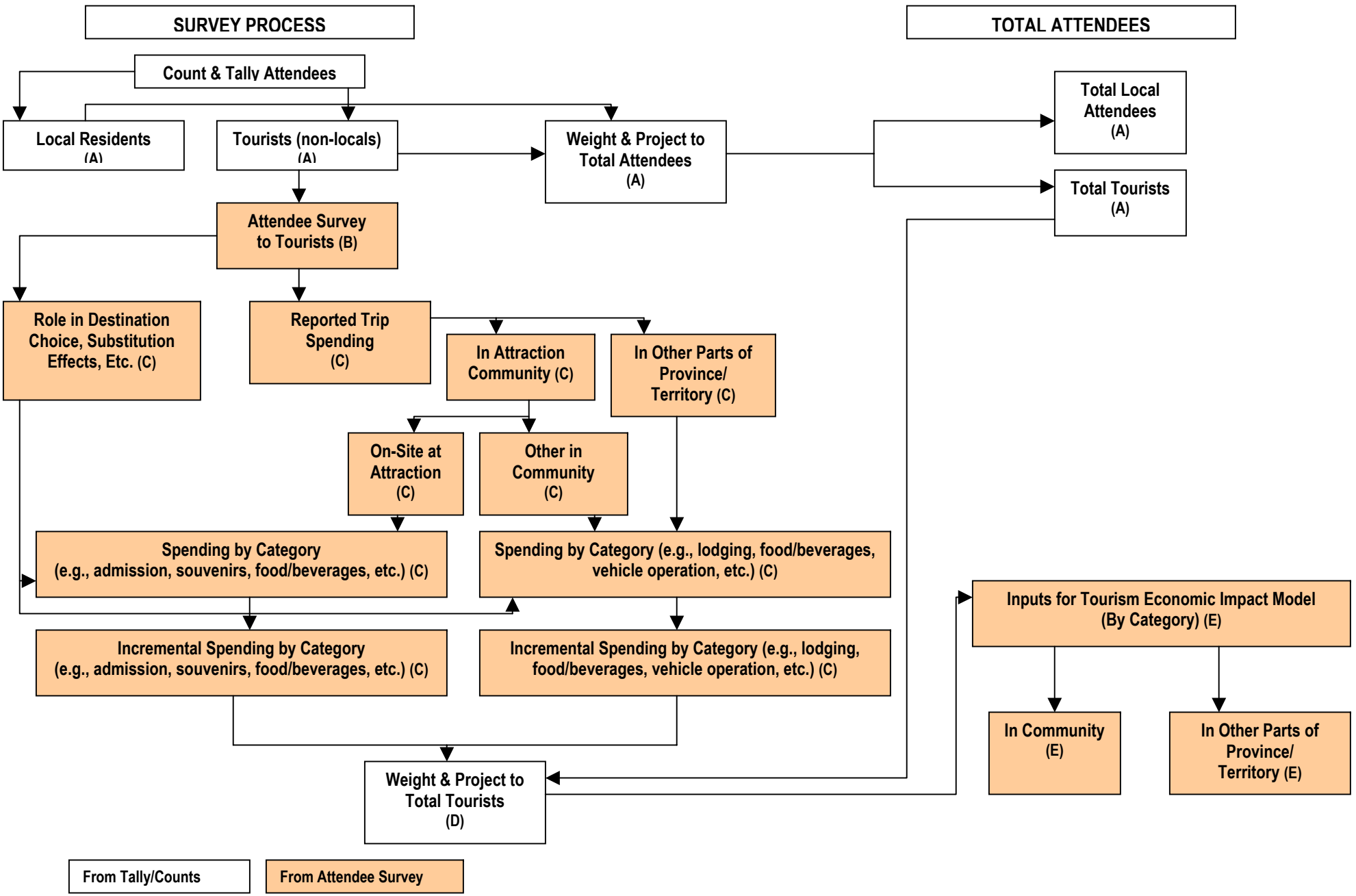


Figure 2
SURVEY PROCESS TO OBTAIN INPUTS FOR A TOURISM ECONOMIC IMPACT MODEL



3. Analysis plan

The analysis and tabulation plan provides guidance for determining how to adjust spending estimates to reflect the *incremental* spending generated by your attraction, and how to weight and project this estimate to all tourists who visited your attraction. Details about how to construct an Analysis Plan are provided in Section VII. A schematic diagram is provided in Figure 2 (page 19). The various steps in the analysis process shown in Figure 2 are described below (refer to letter labels, e.g., "A", "B" for groups of tasks required in the analysis plan).

Estimates and tasks listed under "Count & Tally Attendees" form a critical part of your analysis plan ("**A**"). They permit you to identify the total number of attendees ("Total Attendees") at your attraction and the number who are *tourists* versus *local residents* (using proportions from the Counts & Tallies).

Once you have used data from counts and tallies to estimate "total tourists", you would focus on information you captured from the "Attendee Survey" ("**B**"). Two key elements from the attendee survey among tourists will enable you to identify the amounts of reported tourist spending that will accrue to your attraction:

1. The role of the attraction in destination choice, substitution effects, etc. – this information is used to determine how much spending on-site and in other parts of the community is a result of your attraction (*incremental*) and how much would have been spent whether your attraction were available or not ("**C**").

2. Where tourists report having spent money – this information permits you to assign spending to the appropriate level of geography (in the attraction's community; elsewhere in the province, territory or state, etc.) ("**C**").

Using information that tourists provided in their completed Attendee Surveys (#1 and #2 above), you would isolate the incremental spending for each category of expense. These spending estimates are based on the sample of tourists who completed the Attendee Survey. They now must be projected to "Total Tourists", using the estimate you obtained from the count and tally processes ("**D**")

After you have weighted and projected tourist spending that took place *because of your attraction* (incremental) from the sample of tourists you surveyed to *all* tourists, you are ready to input spending estimates, category-by-category, into the tourism economic impact model you are using ("**E**").

4. Documenting the study process

The manner in which the study is conducted will influence the quality of its results. In order to help you and others who may be presented with your findings understand how robust and reliable the information is, documentation of *what you did* to generate the findings is required. This information is commonly compiled in a Technical Appendix, either as a chapter in your report or as a stand-alone document.

This technical documentation not only provides guidance for interpreting the study findings but also provides a handy reference tool for organizations that may wish to undertake the same type of study "next year" or in subsequent years. The Technical Appendix should provide sufficient information on how the study was conducted that the organization can follow it in the future, thereby, obtaining comparable year-to-year results.

Chapter VIII of these Guidelines provides information on this important documentation tool.

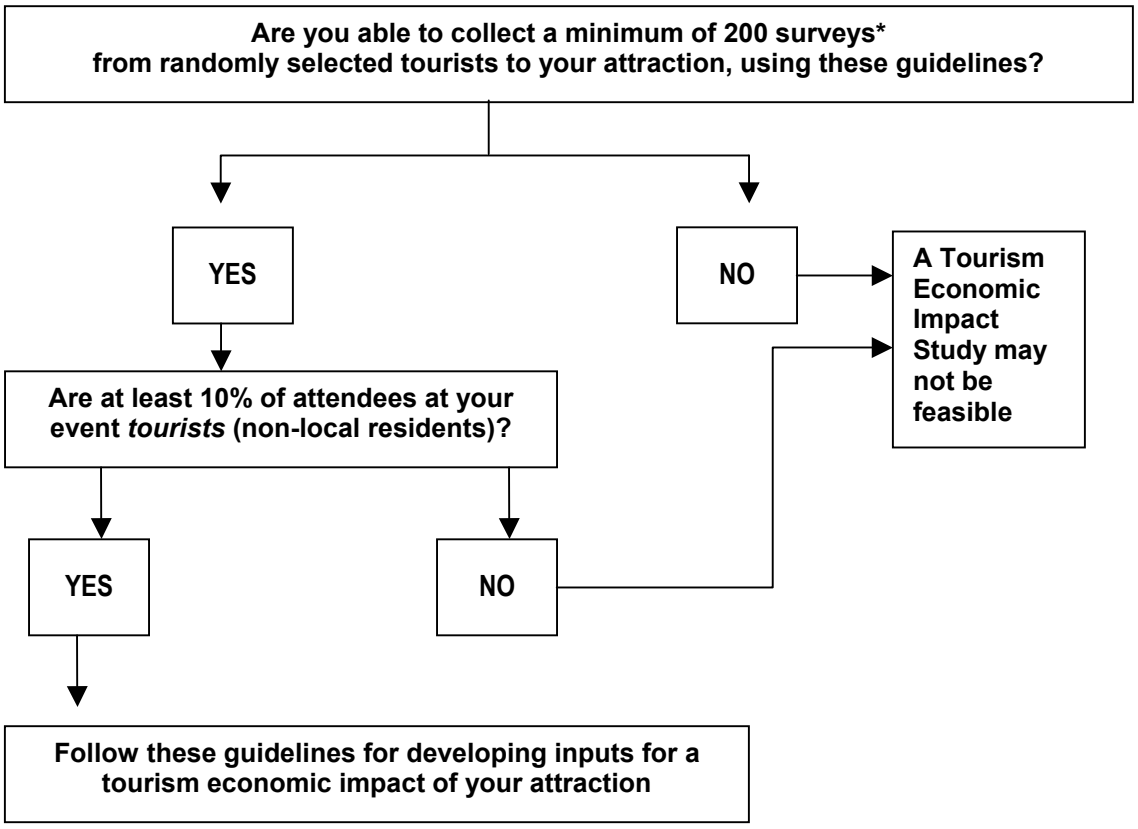
E. Other types of studies

Non-market value studies

An overview of methods to measure the non-market value of an event or festival is provided in a separate document: *Review of Non-market Value Estimation for Festivals and Events*. This document introduces approaches to estimating the social and community benefits that may be generated by an event or festival but are equally applicable to permanent attractions. As noted in the Review, readers are advised to seek professional guidance if they wish to implement this type of benefit analysis because of the relative complexity of the concepts and tasks involved.

F. A decision tree

A decision tree is provided to help you determine which type of study may be most suitable to your information needs and resources. The minimum of 10% tourists is assumed to cover an annual time period (or the full operating year of the attraction). For more details on this topic, see Section III-B.10-a, b.



*See Section III-B.10-a, b for a discussion of survey sample size minimums.

III. THE ATTENDEE SURVEY PROCESS

A. An overview of the process

1. Essential measurement tasks

Even if you know how many attendees came to your attraction, you require a process to estimate with accuracy how many of these attendees are *local residents* and how many are *tourists.* You also need a way to determine how the "sample" of attendees from whom you collect detailed information can be used to represent *all* attendees at your attraction.

Consequently, you need to conduct an ***Attendee Count*** and a ***Tally*** that rely on accepted research practices. Without these components, you will not be able to estimate the economic impact of your attraction accurately.

You also need to conduct an ***Attendee Survey*** among a random sample of *tourists* and *locals* who attended the attraction. This survey will capture information on how much money was spent at the attraction, in your community, and/or in your province, territory or state. Responses to the Attendee Survey will be weighted and projected to all people who attended the attraction *by place of residence.* Only incremental spending associated with the attraction as reported in the Attendee Survey will be used to estimate the economic impact of your attraction. Sample attendee questionnaires are provided in Appendix VII (under separate cover).

Telephone, postal or e-mail follow-up with respondents who accepted an Attendee Survey will likely be required to increase response rates for the important spending information. Telephone numbers of those to whom questionnaires are distributed at the tally stage will be collected. The follow-up contact could take the form of a simple reminder. If, however, the respondent no longer has a copy of the questionnaire, the follow-up process could involve administering the interview over the telephone or via a Web-based survey or mailing out another copy of the questionnaire.

2. A picture of the process

Refer to Figure 1, page 20.

B. Counting & tallying attendees at an attraction: key concepts & issues

1. Elements required for attendee counts and on-site tally

- Sampling Plan & Tally Targets
- Weighting and Projection Plan
- Tally Questionnaire
- Instructions for Tally Interviewers

2. Important definitions for tallies and counts

Stint: Unique observation and/or measurement time period at a specific entry point to your attraction. The stint will form the basis for *sampling* attendees who come to your attraction (e.g., 10:00 am to 1:30 pm).

Stint Sample: A randomly selected set of stints during which you will count and/or tally attendees at your attraction.

Interviewer Stint: A unique observation and/or measurement time period at a specific entry point to your attraction to which one interviewer is assigned to collect information (tally and/or count attendees at your attraction).

Tally Interview: Short interview to obtain basic information about which attendees are locals, tourists, etc.

Counts: All attendees entering during tally stint. You will project the people you tallied during the stint to the total *count* during the same stint.

Stint Weight: Adjustment to sampled stints so that they represent all people who entered your attraction.

Final Ticket Adjustment Weight: Adjustment to match the *total number of ticketed attendees* who came to the attraction to the *number represented by your sample*.

3. Sampling: How the "part" can represent the "whole"

The basic concept behind sampling is that a portion of your attendees can "represent" themselves and other people. Survey researchers rely on samples because they require less time and money than including everyone in the survey process. If everyone were included, you would be conducting a "census".

The characteristics of the attendees you interview in a sample are projected to other people *like themselves* in the total population by calculating a factor (*weight*) that brings your sample up to the total attendee population. This projection process *works* as long as your sample is truly representative of the total attendee population for key characteristics.

Samples are efficient tools in the research process as long as you are careful about how you develop and implement the sampling plan. In order for the people you interview to represent other people that you do *not* interview, you must ensure that those you *do* interview are selected *randomly* and with a *known probability of selection.* [For more information, on sampling principles and concepts, see Trochim = http://www.socialresearchmethods.net/kb/sampling.htm]

4. A "stint" is the sampling unit for counts & tallies

To count and tally attendees as they enter your attraction, you need a sampling plan based on the particular characteristics of your site and the time period your estimate of tourism economic impact is designed to cover. The sampling unit for this part of the study is called a "stint". Its purpose is to designate time periods for systematic observation and/or measurement. A stint corresponds to a pre-set time period (e.g., 10:00 am to 1:30 pm) on a particular day (e.g., Tuesday, June 6) at a particular entry point (e.g., Front Entrance; Side Entrance) .

5. Attendee counts

Because different types of attendees may come to the attraction at different times of day, on different days throughout the operating year, and/or through different entrances, you need a way of sorting out how many different types of attendees came when.

Even if you know how many people *in total* came to your attraction because you sold tickets, you will not be talking to all these attendees to find out their particular characteristics (origin, spending, etc.). For this reason, you need to "sample" the various times/entrances and days a visitor could arrive and ***count the attendees*** who enter at these sampled times/gates and days.

You can assign a person to each entrance on your site to "count" entrants, you can rely on turnstiles that have built-in counters, or drop a ticket into a box for every person who enters the attraction (even if you do not sell tickets to the attraction).

No matter which approach you take to counting people who enter your attraction, you need to make sure you can separate people who entered at different times/locations (stints) because you will need this information in order to adjust the *people you tallied* to the *total entrants* on a stint-by-stint basis.

6. Attendee tallies (the tally interview)

You probably can't talk to <u>all</u> the people who come to your attraction about their place of residence, their household party size, and how much they spent at your attraction and in your community. At the same time, you need a way to estimate this type of information for *all* your attendees.

As with the *attendee counts*, you need to "sample" the various times/gates and days a visitor could arrive and conduct a brief ***Tally Interview*** with a sample of household parties who enter at

these sampled times/gates and days. [A "household party" is the group of people who enter the attraction at the same time and live in the same permanent residence.]

The tally will provide critical information on where your attendees live and provide a tool for excluding from your estimates groups you do *not* want in your analysis. These groups include media, staff, volunteers, etc.

7. Recruitment for the attendee survey

We recommend that you "recruit" respondents for the Attendee Survey as part of the Tally Interview process. Because *tourists* are likely to be relatively scarce, particularly when compared to local residents, you might recruit every *nth* local resident to complete the survey (e.g., every 10th) but would ask *every* out-of-town attendee you tally to complete the survey.

You can conduct the Attendee Survey personally on-site, use a self-completion questionnaire for drop-off on site or to be mailed back, or call/e-mail the attendee at home once the trip is over (for *tourists*).

8. Different attractions require different approaches to stint samples

The complexity of your attraction's site, your resources, and what you are attempting to measure will influence the following:

- how many interviewers you need;
- where they will be assigned to work; and
- the number of hours they must devote to counting, tallying and Attendee Survey recruitment.

For example, different sampling plans will be required for attractions depending on the number of entrances they have, the number of days they operate throughout the year, etc.

9. Tools for "counting" attendees

If you have a *tool* for counting attendees, you would not need to have interviewers doing a physical count at assigned stints. Possible tools for counting include **turnstiles** through which every entrant must pass and that keep running totals that can be tracked on a stint-by-stint basis; or **ticket stubs** (counted for each time period/ location that corresponds to possible stints).

We recommend that you issue tickets (even if you don't charge for them) so you can count ticket stubs for each stint or install turnstiles and keep stint-by-stint records of turnstile counts. By using one of these *tools,* you can obtain an accurate *real time* count of attendees during each stint. These counts can be compiled at the end of each stint or at the end of the project. Using such tools will save on the number of interviewers/staff required to undertake the research plan.

10. How to estimate staff requirements for counting/ tallying

a) Recommended attendee survey sample sizes

You need to ***work backwards*** from the total number of completed Attendee Surveys you want to achieve to determine how many staff you will require for counting and tallying attendees.

Recommended sample sizes differ, depending on the level of analysis you want to conduct and the quality of the final estimates you are willing to accept. Of course, ***bigger is better*** when it comes to sample sizes, as long as you follow a sampling plan to ensure that your respondents are selected randomly and systematically to represent all the people in the group you have elected to study (your *universe*).

To generate inputs for a tourism economic impact assessment, we recommend that you obtain spending information from a **minimum of 200** tourist attendee parties in each of the tourist segments you plan to study. Of course, you can conduct more Tourist Attendee Surveys than 200. The more completions you achieve, the more reliable your final estimates will be.

At 200 completions, responses to a "yes/no" question could be considered accurate $\pm$ 7%, 19 times out of 20.

What does 19 times out of 20 mean? Here is an example: Suppose you are trying to estimate the percentage of tourists at your attraction that visited your community because of the attraction. You can't ask all attendees so you will estimate the percentage by asking a random sample of attendees and use the percentage of your sample that said yes as your "best guess" of the true percentage. If you take a sample of 200 tourist attendees there is a 95% probability (19 out of 20) that the percentage of your sample that said yes is within 7% of the true percentage of all attendees who visited your community because of your attraction. See Appendix II for a table that displays the margin of error for various response levels and sample sizes.

b) 200 completions are the recommended minimum for tourists

To produce inputs for an economic impact estimate, you should obtain at least 200 completed interviews with *non-local* attendees, or *tourists.* You can treat *all* non-local attendees as a "group", conducting 200 interviews with them or you can divide your tourists into "segments" and attempt to reach the 200 minimum tourist household parties for each segment. A "segment" is a group of people who share one or more common characteristics. Examples of tourist "segments" include those who are out-of-town visitors but live in the same province, territory or state as your attraction versus those who live outside your province, territory or state.

c) Tourist segments

Tourist segments become important if you wish to report incremental spending and economic impact for *groups* of tourists such as those who live outside your province, territory, state or country versus tourists (non-locals) who live outside the community but in your own province, territory or state.

d) Target number of tally interviews to complete

Determining how many completed tally interviews you require will depend on how many completed Attendee Surveys you hope to obtain, assuming you will be recruiting household parties to complete the Attendee Survey as part of the tally process. Here are some key questions you need to ask to determine how many tally interviews you should attempt to complete.

What proportion of your total attendees is likely to live outside the local area? Unless you have conducted visitor studies at your attraction in the past and have information on the proportion of attendees from different origins who come, you will have to "guestimate" the proportion you expect to be from outside the local area.

What if you expect few non-local attendees to attend your attraction? Each attraction will have to determine how much effort it wants to devote to obtaining results from tourists, recognizing that to estimate the economic impact of tourists, you require a minimum of 200 completed Attendee Surveys with tourists (household travel parties).

Generally, the more Attendee Surveys you complete with different "types" of tourists, the more reliable your results will be. Guidelines for segmenting tourists will depend on the proportion you expect each sub-group to represent and the level of effort your attraction is able to devote to the study.

If your attraction does not attract at least 10% of attendees who are tourists you are advised NOT to attempt a tourism economic impact assessment.

e) Estimating how many attendee survey completions you need

How many different tourist segments do you expect to analyze separately? If you wish to report that of the total tourism economic impact of the attraction, X% was generated by in-province, in-territory or in-state non-locals, Y% was generated by people from other provinces, territories or states, and Z% was generated by attendees from outside the country, you will require enough Attendee Surveys from each of these groups to produce reliable estimates for *each*.

We recommend a minimum of 200 completed Attendee Surveys for each group you plan to analyze as a separate entity. In this scenario, you would require approximately 600 completed Attendee Surveys with *tourists* and, if you elect to do so, an additional 200 Attendee Surveys with local residents. Locals are included to provide on-site spending and other information about

their experiences at the attraction. Their on-site spending is *not* included as an input to a tourism economic impact model.

Locals*	In-province, in-territory or in-state non-locals	Other provinces, territories or states	Outside the country	Total Completed Attendee Surveys
200	200	200	200	800
*optional				

If, on the other hand, you plan to report tourism economic impact as a single number, covering all non-local attendees, you will require fewer Attendee Surveys. In this scenario, you would require approximately 200 completed Attendee Surveys with *tourists* and, if you elect to do so, an additional 200 Attendee Surveys with local residents. You can "combine" non-local origin groups, depending on your analytical needs and the proportions each origin group is expected to represent.

Locals*	Non-Locals	Total Completed Attendee Surveys
200	200	400
*optional		

f) What if you do not know how many people will likely attend your attraction?

If you cannot *guestimate* total attendance at your attraction and/or what proportion of your attendees are likely to be *tourists*, how can you reach the recommended minimum number of completed Attendee Surveys?

Since the *stint* is the sampling unit, you would assign sufficient stints to tally and recruit attendees, assuming a constant flow of entrants. Depending on the draw of the attraction and its attractiveness to tourists, you may or may not meet the minimum completions recommended for analysis.

In effect, you will only know how many attendee segments you can analyze *once the tally process has been completed.* At that time, you will review the number of completions you obtained with various segments (locals, in-province/territory/state non-locals, other domestic tourists and foreign tourists) and determine which segments meet the 200 minimum completions to support analysis.

Because your study period covers the attraction's entire *operating year,* you may be able to *adjust* your sampling plan or the number of interviewers you assign per stint if, as you monitor the number of completed *usable*[5] questionnaires/interviews you have achieved with tourists, you determine that a shortfall is likely. If you do elect to alter your sampling plan partway through the study period by increasing the number of interviewer stints, stint duration or the number of interviewers you assign per stint, you must do this in a way that retains the systematic and random nature of the original sample.

[5] Only questionnaires meeting minimum information requirements are deemed *usable* and only these count toward the total target number of completions you have set for the study. For more information on *usable* questionnaires, see Section VII.B.3.

g) There are no guarantees

There are no guarantees that you will achieve the minimum sample size of 200 completions with each group you wish to analyze separately. Instead, once you review the final number of completions you achieve, you may elect to *combine* some market segments in order to meet the 200 minimum for analysis purposes. You may find that your study did not produce sufficient information from *tourists* to conduct a tourism economic impact analysis at the recommended minimum.

Why might you experience a shortfall in the number of tourists in your study? Factors that might produce a shortfall include the following:

- you might have over-estimated how many tourists would come to your attraction;
- you may have assigned too few stints to capture enough tourists;
- even if you have had previous experience to suggest that your attraction would attract sufficient tourists to meet your minimum objectives, a shift in gasoline prices, a terrorist alert, poor weather conditions or other factors could suddenly alter the number of people travelling at the time of your attraction.

You can *use* information from samples smaller than 200 but the level of precision of your estimate will *decrease* as your sample size *decreases.* And of course, the converse is also true: the more completions you obtain, the higher the level of precision your estimates will have. See Appendix II for a table that displays the margin of error for various response levels and sample sizes.

11. More information about tallying attendees

a) How many "stints" do you need?

The number of "count" and "tally" stints you require will depend on the complexity of your attraction, on the flow of traffic into your attraction and on the number of target tallies you hope to achieve.

Estimates of tourism economic impact will be produced for your *full operating year.* Because different types of tourists may come in peak season than come in non-peak periods and because the prices of goods and services consumed by tourists in your community likely change from season to season, you will need to assign stints throughout your full operating period.

Other factors that will influence the number of stints you require include the following:

- How people flow into the attraction: Do they tend to "flood in" all at once at certain times of day, on particular days of week or during particular months or do they "trickle in" at a slow but steady rate;

- The number of people you can assign to each "stint" for the tally process, recognizing that, as a rule of thumb, one "tallier" can obtain the necessary information from about ten "parties" per hour.

See Section III-C for examples of how to estimate stint requirements.

b) The more attendees you tally, the more reliable your final estimates will be.

Why is the actual number of tallied attendees so important? Because you will use the proportions of local versus non-local attendees from the tally to estimate the "mix" of your total attendance. Here is an example:

- You expect about 80% of your attendees will be local residents and 20% will live outside the area (non-locals).

- 1,000 people enter your attraction over a thirty-minute period during one of your tallying stints. You have assigned one person to "tally" attendees during this stint.

- This interviewer will likely speak to no more than 5 household parties during the 30-minute period (assuming that one interviewer can complete tally interviews at a rate of about ten per hour).

The chances are good that all 5 parties the one interviewer tallied over a 30 minute "rush" through the entrance would be local, because out of 5 parties, 4 of them *should* be "local" (80% of 5 = 4). If the 5 parties tallied happened to be local residents, you might make the *false* assumption that only local people came to your attraction (100% local).

What if you had interviewed 20 parties? Out of these 20 parties, assuming that 80% really are local, you should find 4 parties that are not local. And if you had a crew of ten talliers over the 30-minute rush, you would have tallied 50 parties, hopefully finding more of the 10 *non-local* parties.

Because the more attendees you tally, the better chance you have of finding "low incidence" groups such as non-local attendees, you need to assign interviewers to stints *strategically* to maximize the number of attendees you tally.

c) What is* strategic *staffing for tallies?

Strategic staffing takes into account expected flow, assigning more staff to *high volume* stints and less staff to *low volume* stints. Thus, you might assign three or four interviewers to a stint with expected high volumes but only one or two interviewers to a stint with expected low volumes. Strategic staffing for tallies can be used to increase the "yield" or number of completed tallies but it is not as systematic as using a stratified stint sampling plan.

Even though sampling, weighting and projection procedures are somewhat more complex for **stratified random sampling**, it is recommended over strategic staffing combined with a simple random sample approach (see Section III-C for more details about sampling methods).

d) A special note for tallying at a timed, ticketed event at your attraction

If your attraction hosts an event in which *everyone* arrives at the same time, you may need to augment your "stint" sample with additional tally stints. If almost all of your attendees arrive at the same time for a special event, there may be no way to keep the crowds flowing through AND conduct sufficient tally interviews to have viable estimates of different visitor types. Recommendations for handling this situation are provided in the Concentrated Entry Attractions section (Section IV-B-1-c).

A note of caution: these Guidelines are *not* designed to estimate the tourism economic impact of a special event, show or display at your attraction. If your event is hosting a special event or exhibit, you may wish to ensure that some "stints" are assigned to these "special" activities so that tourists they attract are included in your annual estimates. If you elect to produce an estimate of the tourism economic impact of the special event *per se*, a separate study would be required. For more information on how to implement a study for a special event, consult the *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated Events and Festivals* (available under separate cover).

e) You must be* systematic *in the tally process

As long as you have covered all the time periods over your operating year and locations at which people can enter your attraction in a systematic and pre-set way, your "tallies" can be adjusted to represent *all* attendees. If the plan does not meet these criteria, the results of all your tallying effort will be for nought because you will be unable to *project* your sample to the total *universe* of attendees at your attraction.

f) Selected tally stints must be completed

There is no hard and fast rule about how many tallies are *enough.* Remember, the sampling unit is based on time and location (stints) rather than completed tallies. Guidelines for completed tally interviews are "targets" and not quotas.

Your tally staff must continue their random pattern of selection of household parties throughout the entire stint period and each selected stint must be completed (weather cancellations may be unavoidable. See Section III-D-2). If you "stop" the tallying process when you reach a "target", the sample will no longer be valid. You must ***finish*** the tallying process for all selected stints.

12. "Interviewer stints"

An *interviewer stint* represents a fixed time period of work by one interviewer at a specific location. You can set stint duration to meet your expected entry patterns, recognizing that an interviewer can work productively for no more than about a five to six hour period. Thus, your maximum interviewer stint duration should not exceed six hours.

The time span during which attendees are expected to enter the attraction will determine how many possible stints you will have in your sample frame. For example, if everyone "enters" over a four-hour period, you might have a single time block of four hours. If people might be expected to enter over the course of a ten-hour period (e.g., 10:00 am through 8:00 pm), you might have two time blocks of 5 hours each.

You can also set shorter stint durations than the maximum number of hours an interviewer can work productively. As a general rule, the shorter the stint duration, the more *coverage* you will obtain at different locations (entrances) and over different months of the year and the more *flexibility* you will have for taking into account high volume and low volume entry locations and time periods.

If *all* attendees are expected to enter within a very short period of time, entrances will not be a realistic location for capturing sufficient tally information. In this case, additional tally time blocks and locations would be required within the attraction itself. Recommendations for handling this situation are provided in the Concentrated Entry Attractions section (Section IV-B-1-c).

13. Number of tally interviewer stints required to meet Attendee Survey completion targets

Remember, you have to work *backwards* to identify how many tally interviewer stints you will require to meet your *Attendee Survey* targets. In turn, the Attendee Survey targets will depend on how many *non-local* attendees you expect to attend your attraction and how many different sub-groups among non-locals you plan to analyze.

Once you have determined the *smallest* group you plan to examine in your analysis, use the expected incidence of this group (incidence = the proportion [%] a smaller sub-group represents of all attendees at your attraction) to calculate how many interviewer hours and interviewer stints you will need for the tally process. Why pick the smallest group? Because as you attempt to find people in the lowest incidence group, you will also find people who represent larger proportions of your attendees.

Here's an example. It assumes the following proportion of attendees by origin and that you want to obtain at least 200 completed Attendee Surveys with each group.

Place of Residence	Expected Percentage	Target Attendee Completions
Total	100%	800
Foreign Countries	5%	200
Other Domestic	10%	200
Same Province/Territory/State (non-local)	15%	200
Local	70%	200

In order to obtain 200 Attendee Survey completions with residents of **foreign countries** (the *lowest incidence* group), you would have to tally approximately 9,400 household parties, assuming that 85% of those you tally agree to complete the Attendee Survey and that 50% of those who agree to do so actually complete the Attendee Survey.

Of the 9,400 tallied household parties, about 470 would be from foreign countries (9,400 * 5% = 470) and you would attempt to recruit *all* of them to complete the Attendee Survey. ***At the same time*** that you are tallying the 9,400 household parties to find the 5% of foreign tourists, you will *automatically* tally enough household parties from the other origin groups of interest to you to obtain 200 completed attendee surveys with each group. In fact, you would likely find more than you need.

	Expected Percentage	Tally	Recruited for Attendee Survey @ 85% Acceptance Rate	Completed Attendee Survey @ 50% Response Rate
Foreign Countries	5%	471	400	200
Other Domestic	10%	941	800	400
Same Province/ Territory/State (non-local)	15%	1,412	1,200	600
Local	70%	6,588	5,600	2,800
Total		9,412		

Acceptance and response rates may vary from attraction to attraction. Those shown here are examples only.

14. Sampling tallied household parties for attendee surveys

As shown in the accompanying table, to find enough **foreign** attendees to achieve 200 completed Attendee Surveys, you would tally as many as 6,588 *local* residents, assuming they represent 70% of all your attendees, 1,412 non-local attendees who live in the same province/territory/state as the attraction (assuming a 15% incidence), and 941 attendees who live in other provinces/territories or states (assuming a 10% incidence).

You can either recruit all the household parties you tally in all groups to complete your Attendee Survey or you can *sample* them at a pre-set rate. If you recruit *everyone* for the Attendee Survey, you will have more reliable estimates, but you will also have a lot of information to process. In this example, you could have as many as 2,800 completed Attendee Surveys with *locals* -- more completed Attendee Surveys than you need for reliable spending estimates.

We recommend that you sample tallied attendees at the recruitment stage so that you have enough completed Attendee Surveys but do not get overwhelmed by the volume of surveys to process and analyze.

	Expected Percentage	Tally	Recruited for Attendee Survey @ 85% Acceptance Rate	Completed Attendee Survey @ 50% Response Rate	Sampling Rate for Recruitment for Attendee Survey to Achieve 200 Completions Per Segment	Total Completed Attendee Surveys
Foreign Countries	5%	471	400	200	All (100%)	200
Other Domestic	10%	941	800	400	Every 2nd	200
Same Province/Territory/ State (non-local)	15%	1,412	1,200	600	Every 3rd	200
Local	70%	6,588	5,600	2,800	Every 14th	200
Total		9,412				

Acceptance and response rates may vary from attraction to attraction. Those shown here are examples only.

15. What if your attraction does not attract enough *tourists* to achieve 200 attendee survey completions?

If your attraction attracts relatively few "tourists", you can still estimate tourism economic impact so long as the *rate* at which you sample tourists is relatively high. If, for example, your attraction attracted 150 tourists and you obtained completed Attendee Surveys from at least half of them (75), your estimate of tourism spending associated with your attraction would be relatively stable based on the *Law of Large Numbers* in statistics. Averages and proportions vary less in large samples than in small samples of the same population (*tourists*). If, of course, there are many more than 150 tourists at your attraction, a sample of only 75 would not necessarily produce stable estimates. To achieve 75 completed attendee surveys from *tourists* at this hypothetical attraction, you would likely have to tally and recruit *all* of the 150 tourists who came (assuming that half of them would complete and return the questionnaire).[6]

If you have a small attraction and/or expect that low proportions of your attendees will be *tourists* (live outside the *local* area), you should consider whether undertaking an economic impact estimation process is appropriate.

a) Number of tally interviewer stints required if you cannot estimate number of attendees or tourists

If you cannot estimate total attendance or how many tourists you expect in advance, you will have to assign enough interviewer tally stints to optimize the chances of obtaining sufficient completed Attendee Surveys with groups of interest to you.

As a general rule, assume that each interviewer can tally and recruit approximately ten household parties per hour, completing 50 tallies in a five-hour stint (assuming an even flow of entrants over the five hours).

To obtain 400 completed Attendee Surveys with a cross section of attendees (all places of origin, as they fall in your attraction's total attendance), you would require approximately 19 interviewer stints of five hours each, as follows:

Hours per Interviewer Stint	Tallies/ Recruits Per Hour	Tallies/ Recruits Per Interviewer Stint	Accepted Attendee Surveys per Interviewer Stint *	Completed Attendee Surveys per Interviewer Stint **	Number of Interviewer Stints Required to Reach 400 Completed Attendee Surveys
5	10	50	42.5	21.25	(400 ÷ 21.25) = 18.8

*Assuming 85% acceptance rate.
**Assuming 50% completion rate among acceptors.
Note: Acceptance and response rates may vary from attraction to attraction. Those shown here are examples only.

[6] *Statistics, A New Approach*, Wallis, A.W., Roberts, H.V., The Free Press, Glencoe, Illinois, 1956, p. 123.

At a sample size of 400 attendees representing tourists and locals "as they fall in the population" (cross section), you may or may not be in a position to estimate the economic impact of your attraction among tourists. There may be too few tourists in your sample of 400 on which to base spending estimates with a minimum level of precision.

16. Number of interviewers required

You will have to determine how many people you have available to conduct tallies, counts and, if it forms part of your plan, on-site interviews with attendees over the course of the attraction.

The number of tally interviewers you require will depend on the number of different people you assign to each stint. For example, during very high volume entry periods, you may want to assign ten people to conduct tallies as your attendees enter. During low volume entry periods, you may reduce the "tally team" to one or two interviewers. The number of interviewers required will also depend on which sampling approach you select.

Remember, you will also need at least one person at each tally location who **counts** all attendees as they enter unless you are recording turnstile entries or collecting and counting ticket stubs on a stint-by-stint basis.

C. Designing a sampling plan for counts and tallies

Because many attractions will not have the volunteers or funds to hire enough interviewers to cover all times throughout the operating year, these guidelines are based on using sampled stints for counting and tallying attendees. In this plan, you would randomly select stints for tallying attendees and counting entrants from a list of all possible stints.

This section is designed to provide you with the basic steps required to generate a sample for counting and tallying at your attraction. You would customize it to correspond to the particulars of your attraction, including taking special steps for special events, exhibits or activities.

1. Estimating the number of interviewer stints you require for counts and tallies

Before you can draw your sample of stints, you need to estimate how many interviewer hours you will require to achieve your target number of attendee survey completions.

For example, we have made the following assumptions about the characteristics of the attraction.

- 1 entrance
- 2 daily time blocks (10:00 am to 1:30 pm; 1:30 pm to 4:30 pm)
- 52 weeks per operating year, open to the public 6 days per week
  [52 weeks * 6 days per week = 312 operating days]

In this example, you would have 624 possible stints, calculated as follows:

[1 Zone * 2 Time Blocks/Day * 312 Operating Days = 624]

The number of *interviewer stints* you would require will depend on how may completed *attendee surveys* you wish to achieve. To calculate the number of interviewer stints you require, you would:

1. Identify the attendee *segments* you plan to examine in your analysis (e.g., *all attendees; out-of-province/territory attendees, etc.*) keeping in mind the recommendation for 200 completed attendee surveys for each tourist segment you plan to analyze separately (see Chapter III, Section B-13/16);

2. Estimate, to the extent you can, the *rate* or *incidence* at which these segments are likely to occur in your attendee population (incidence is the proportion a segment represents of all attendees at your attraction over the full course of your operating year);

3. Identify a realistic *acceptance rate* and *response rate* for the attendee survey (how many of the tallied households will *accept* the attendee survey and of these, how many will actually *complete* and return the survey form)[7];

4. Take into account that an interviewer can work effectively for no more than about five hours at a stretch.

The following table provides an example of how you would go about these calculations (see next page).

[7] Acceptance and response rates used throughout these Guidelines are examples only. They will vary based on the particulars of an attraction and the type(s) of attendees it attracts. For example, teenagers may be less cooperative with a survey process than are older attendees. Attraction managers will have to use their experience and judgement to estimate likely acceptance and response rates but should recognize that acceptance rates could be as low as 50% and completion rates could fall below the 50% estimate used in these Guidelines.

	Target = 400 Completions with *All Attendees* (Cross Section)	Target = 200 Completions with *Out-of-Province/Territory/ State* Attendees (5% incidence)	Target = 200 Completions with *All Tourists* (20% incidence)
Hours per Interviewer Stint	4.5	4.5	4.5
Tallies/ Recruits Per Hour	10	10	10
Tallies/ Recruits Per Interviewer Stint you would expect to find in each market segment	45.00	2.25	9.00
Number of Household Parties who Accept Attendee Survey per Interviewer Stint (assuming 85% acceptance rate)	38.25	1.91	7.65
Number of Completions you can expect per Interviewer Stint (assuming 50% completion rate among acceptors)	19.13	0.96	3.83
Number of Interviewer Stints Required to Reach Target	20.92	209.15	52.29
Minimum Number of Additional Interviewers to Count Attendees	2 per stint	2 per stint	2 per stint
Acceptance and response rates may vary from attraction to attraction. Those shown here are examples only.			

If you wanted to complete 400 Attendee Surveys with *all* attendees (cross-section – see Glossary), you would require about 21 interviewer stints.[8] If, however, you wanted to complete 200 Attendee Surveys with *Out of Province/Territory/State Tourists*, you would require over 200 interviewer stints. If you wanted to complete 200 Attendee Surveys with *All Tourists*, you would require about 52 interviewer stints.

Many attractions will not have the resources to obtain enough completed Attendee Surveys with low incidence groups to support independent analysis of these groups. In these cases, the number of non-local groups can be reduced, thereby increasing the overall incidence (as in the example, moving from out-of-province/territory tourists at an expected rate of 5% to *all tourists* at an expected rate of 20%).

In addition to the number of tally interviewers assigned to a stint, staff will be required to implement the appropriate counting process to estimate total attendance.

[8] Round up to the nearest whole number.

2. All times and locations must have an opportunity to be in your stint sample

You can assign interviewers to various times and locations based on your expectations of traffic flow through your attraction but you must ensure that all possible time slots and locations over the duration of your operating year have an opportunity to be included in your stint sample.

To achieve this goal, you need to develop a stint sampling plan. The steps to create a stint sampling plan are described in the following section. In our example, we will assume that you will have teams of two interviewers for the tally process and wish to achieve a target of 200 completed **attendee surveys** with *tourists* (see table/example in Section III-C-a).

In this scenario, you would require about **26 stints** to achieve your target (52 interviewer stints divided by two interviewers on each team = 26 stints).

D. The stint sampling plan

1. Three basic steps

Once you have estimated how many stints you require to count and/or tally attendees, you will create a stint sampling plan and select the time periods and locations at which you will assign interviewers.

There are three basic steps to build a sampling frame and to select your count/tally stint sample:

1. List all possible time/location periods over the full duration of the attraction (*all* days);

2. Pick a random start point and select an interval (every n^{th} where n = total possible stints ÷ number of stints you require to achieve the target number of counting locations or completed attendee surveys you hope to achieve, to the nearest whole number);

3. Starting at your random start point, count every n^{th} (your interval). Keep counting until you have been through the entire list of possible stint times. The rows that correspond to every n^{th} represent your stint sample for counting and/or tallying.

2. Two types of random sampling plans

You can elect to use a "Simple Random Sampling Plan" in which each location/time period is given an equal chance of being selected for your stint sample or you can use a "Stratified Random Sampling Plan" in which you adjust the rate at which you randomly select locations/time periods.

The Stratified Random Sampling Plan approach is recommended for attractions because the flow of *tourists* will vary considerably over time (more tourists may be expected in the *peak* than in *off-peak* months). Stratified Random Sampling is a more complex approach and requires additional effort when you transform your "sample" into estimates for the full attendance at your attraction

than simple random sampling, but it has the advantage of increasing the *yield* of completed tallies and attendee surveys for each hour your interviewers are working.

Possible options for stratification include entrance, weekday versus weekend days, high volume versus low volume times or days, or other significant anticipated differences in attendee volumes. Knowledge of the attraction will help you determine the optimal variables for stratification of your stint sample. In the examples provided in these guidelines, a twelve-month operating year has been divided into two strata: *High Volume* months (June-September) in which it might be expected that tourists would be at the attraction in higher concentrations than in *Low Volume* months (October-May). In this example, the high volume stratum would represent one-third of the attraction's annual operating days (33%) because operating days in June through September are one-third of all operating days over the calendar year. The low volume stratum would represent two-thirds of annual operating days (67%) because October through May represents two-thirds of the operating days over the calendar year.

Examples of how to list and select possible stints and make the necessary adjustments to project your "sample" to "total attendees" are provided in the following pages for a stratified random sample.[9]

3. A generic stratified random sampling plan

a) About stratified random samples

A stratified random sampling plan will enable you to maximize the *yield* of counted and tallied attendees because you will sample *high* volume time periods at a higher rate than you sample *medium* or *low* volume ones. You can set up as many different stratum as you want. The example provided in this section is based on two strata. Remember, these are examples *only.* You will build the stint sampling plan based on the particular characteristics of your attraction.

To construct a stratified sampling plan using two strata – a *high* and a *low* volume stratum – you would identify the times/locations that will be included in each.

You would then follow the steps described below for all possible time periods/ locations *within* each of the stratum. If you elect to use a simple random sample, you would follow procedures similar to those described in this section, but you would have a single stint listing of *all* possible stints throughout your operating year and make a single set of random selections to identify when you would be counting and tallying attendees. As noted above, however, a stratified approach to sampling is recommended for attractions because it maximizes the opportunity to find and capture information from *tourists* over the operating year.

[9] Stratified random sampling is the recommended approach for permanent attractions because of the annual duration of the survey period. By using stratified random sampling of stints, attractions can optimize fieldwork during "high tourist traffic" periods such as the *summer* months. Attraction managers interested in examples of how to generate a simple random sample are advised to review Section III.D.3 of the *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated Events and Festivals* (under separate cover).

b) Different sampling rates for different stratum

The *sampling rate* or the number of stints you select within each stratum may be different for a stratified sample. You might assign stints at a higher rate for high volume periods than for low ones. You MUST, however, include a random sample of stints from *each* stratum you create in your sampling plan. At the weighting and projection phase, each of the stints completed *within* a stratum will be adjusted to the total attendance for its stratum. Subsequently, projections for each *stratum* will be combined to reflect the relative weight of each stratum.

You have estimated that approximately 52 stints [see Section III.C.1] are required to meet the "target number of completed attendee surveys with *tourists*" over the full operating year, as follows:

- Interviewer teams of 2
- Target = 200 completed attendee surveys with *tourists.*
- Require: 52 interviewer stints
- 26 stints to be selected from stint listing (52 interviewer stints ÷ 2 interviewers per team = 26 stints)

Remember that in our example, we have made the following assumptions about the characteristics of the attraction.

- 1 entrance
- 2 daily time blocks (10:00 am to 1:30 pm; 1:30 pm to 4:30 pm)
- 52 weeks per operating year, open to the public 6 days per week

c) Assigning stints within High and Low Volume Strata

You expect higher volumes of attendees and *tourists* from June 1 through September 30 (*high volume*), and lower volumes of attendees and *tourists* from October 1 through May 31 (*low volume*).

You have estimated that approximately 13 *high volume* stints and 13 *low volume* stints are required to meet the "target number of completed attendee surveys with *tourists*" (see sample calculations on the following page).

	Target = 200 Completions with *All Tourists*	High Volume Months 33% of annual operating days	Low Volume Months 67% of annual operating days
Anticipated Incidence of *Tourists*	20%	25%	15%
Hours per Interviewer Stint	4.5	4.5	4.5
Tallies/ Recruits Per Hour	10	10	10
Tallies/ Recruits Per Interviewer Stint you would expect to find in each market segment	9	11.25	6.75
Number of Household Parties who Accept Attendee Survey per Interviewer Stint (assuming 85% acceptance rate) [e.g., 9 * 85% = 7.65]	7.65	9.56	5.74
Number of Completions you can expect per Interviewer Stint (assuming 50% completion rate among acceptors) [e.g., 7.65 * 50% = 3.83]	3.83	4.78	2.87
Target for High /Low Volume Strata	N/A	125.00	75.00
Number of Interviewer Stints Required to Reach Target (assuming 2 interviewers per stint) [e.g., 125/4.78 = 26 interviewer stints. 26 interviewer stints/2 interviewers per stint = 13]	26	13	13

d) Step 1: list all possible stints

When listing all *possible* stints, only include days/time periods during which the attraction is open to the public. For example, if the attraction is closed on certain holidays and/or operates only five or six days in the average week, these holidays/closed days should be excluded from *possible* stints.

Total number of listed possible stints for counting and/or tallying would be 624 (as follows):

[1 Entrance * 2 Time Blocks/Day * 312 Days = 624]

Of these 624 stints, 204 would be High Volume stints (e.g., all operating days in June-September) and 420 would be Low Volume stints (e.g., all operating days in October-May).

You would list the 204 High Volume and the 420 Low Volume stints *separately* (see following charts). With such large numbers of possible stints, we recommend that you use some form of electronic spreadsheet (e.g., Excel, Lotus 1-2-3, Quattro Pro) to list the stints. Use one worksheet for the High Volume listing and a separate one for the Low Volume listing.

e) Step 2: select random start point & interval

In this example, we have shown only a partial list of all possible stints for High and Low Volume strata. When you actually prepare your sampling plan, you must list ALL possible stints and make your random selections among these. In our example, we have selected the 5th stint down as the **random start point**, but you can select any row in the list to begin the "counting process".

The **interval** (*n*) for *high volume stints* in this example is 16, as described below:

n = total possible *high volume* stints (204) ÷ number of *high volume* stints you require to achieve your target number of completed attendee surveys (13) = 16

204 ÷ 13 = 15.7, rounded up to the nearest whole number [16].

The interval (*n*) for *low volume stints* in this example is 33, as described below:

n = total possible *low volume* stints (420) ÷ number of *low volume* stints you require to achieve your target number of completed attendee surveys (13) = 33.

420 ÷ 13 = 32.3, rounded up to the nearest whole number [33].

f) Listing stints for a stratified sampling plan

- For each list, you would identify a random start point and a selection interval based on the target number of completed attendee survey questionnaires you set (See Section III-C for a discussion of how to set target completions).
- For the High Volume list, your interval is every 16th.
- For the Low Volume list, your interval is every 33rd.

See the example on the following page for how you would set up stint listings and selection procedures for a stratified sampling plan. The example displays a partial stint listing for a High Volume sampling plan.

Once you have created your stratified sampling plan, you should review it to ensure that there is a "fair" representation of all days of week (e.g., weekdays, weekends, individual days of week) and time periods (e.g., morning, afternoon, etc.). Even though you have used "random selection principles" to develop the sampling plan, there are cases in which the outcome does not include at least some stints for each possible day of week or time of day. If this situation occurs, you should consider selecting a different random start point, moving from an *even number* to an *odd number* or vice versa and re-do the stint selection process.

Month	Date	Time	Count	Month	Date	Time	Count
June	1	10:00 – 1:30	205	**July**	**2**	**10:00 – 1:30**	**48**
June	1	1:30 – 4:30	206	July	2	1:30 – 4:30	49
June	2	10:00 – 1:30	207	July	3	CLOSED – Not included	
June	**2**	**1:30 – 4:30**	**208**	July	4	10:00 – 1:30	50
June	3	10:00 – 1:30	209	July	4	1:30 – 4:30	51
June	3	1:30 – 4:30	210	July	5	10:00 – 1:30	52
June	4	10:00 – 1:30	**1*Random Start**	July	5	1:30 – 4:30	53
June	4	1:30 – 4:30	1	July	6	10:00 – 1:30	54
June	5	CLOSED – Not included		July	6	1:30 – 4:30	55
June	6	10:00 – 1:30	2	July	7	10:00 – 1:30	56
June	6	1:30 – 4:30	3	July	7	1:30 – 4:30	57
June	7	10:00 – 1:30	4	July	8	10:00 – 1:30	58
June	7	1:30 – 4:30	5	July	8	1:30 – 4:30	59
June	8	10:00 – 1:30	6	July	9	10:00 – 1:30	60
June	8	1:30 – 4:30	7	July	9	1:30 – 4:30	61
June	9	10:00 – 1:30	8	July	10	CLOSED – Not included	
June	9	1:30 – 4:30	9	July	11	10:00 – 1:30	62
June	10	10:00 – 1:30	10	July	11	1:30 – 4:30	63
June	10	1:30 – 4:30	11	**July**	**12**	**10:00 – 1:30**	**64**
June	11	10:00 – 1:30	12	July	12	10:00 – 1:30	65
June	11	1:30 – 4:30	13	July	13	10:00 – 1:30	66
June	12	CLOSED – Not included		July	**13**	1:30 – 4:30	67
June	13	1:30 – 4:30	14	July	14	10:00 – 1:30	68
June	13	10:00 – 1:30	15	July	14	1:30 – 4:30	69
June	**14**	**1:30 – 4:30**	**16**	July	15	10:00 – 1:30	70
June	14	10:00 – 1:30	17	July	15	1:30 – 4:30	71
June	15	1:30 – 4:30	18	July	16	10:00 – 1:30	72
June	15	1:30 – 4:30	19	July	16	1:30 – 4:30	73
June	16	10:00 – 1:30	20	July	17	CLOSED – Not included	
June	16	1:30 – 4:30	21	July	18	10:00 – 1:30	74
June	17	10:00 – 1:30	22	July	18	1:30 – 4:30	75
June	17	1:30 – 4:30	23	July	19	10:00 – 1:30	76
June	18	10:00 – 1:30	24	July	19	1:30 – 4:30	77
June	18	1:30 – 4:30	25	July	20	10:00 – 1:30	78
June	19	CLOSED – Not included		July	20	1:30 – 4:30	79
June	20	10:00 – 1:30	26	**July**	**21**	**10:00 – 1:30**	**80**
June	20	1:30 – 4:30	27	July	21	1:30 – 4:30	81
June	21	10:00 – 1:30	28	July	22	10:00 – 1:30	82
June	21	1:30 – 4:30	29	July	22	1:30 – 4:30	83
June	22	10:00 – 1:30	30	July	23	10:00 – 1:30	84
June	22	1:30 – 4:30	31	July	23	1:30 – 4:30	85
June	**23**	**10:00 – 1:30**	**32**	July	24	CLOSED – Not included	
June	23	1:30 – 4:30	33	July	25	10:00 – 1:30	86
June	24	10:00 – 1:30	34	July	25	1:30 – 4:30	87
June	24	1:30 – 4:30	35	July	26	10:00 – 1:30	88
June	25	10:00 – 1:30	36	July	26	1:30 – 4:30	89
June	25	1:30 – 4:30	37	July	27	10:00 – 1:30	90
June	26	CLOSED – Not included		July	27	1:30 – 4:30	91
June	27	10:00 – 1:30	38	July	28	10:00 – 1:30	92
June	27	1:30 – 4:30	39	July	28	1:30 – 4:30	93
June	28	10:00 – 1:30	40	July	29	10:00 – 1:30	94
June	28	1:30 – 4:30	41	July	29	1:30 – 4:30	95
June	29	10:00 – 1:30	42	**July**	**30**	**10:00 – 1:30**	**96**
June	29	1:30 – 4:30	43	July	30	1:30 – 4:30	97
June	30	10:00 – 1:30	44	July	31	CLOSED – Not included	
June	30	1:30 – 4:30	45	August	1	10:00 – 1:30	98
July	1	10:00 – 1:30	46	August	1	1:30 – 4:30	99
July	1	1:30 – 4:30	47	August	2	10:00 – 1:30	100

Continue, as above for rest of July, August, and September until you have randomly selected the number of required High Volume stints. In this example, you would select 13 stints.

By following the procedures described here, you will identify the following 13 High Volume stints.

13 Selected High Volume Stints				
Selected Stints	Month	Date	Time	Count
1	June	2	1:30 – 4:30	208
2	June	14	1:30 – 4:30	16
3	June	23	10:00 – 1:30	32
4	July	2	10:00 – 1:30	48
5	July	12	10:00 – 1:30	64
6	July	21	10:00 – 1:30	80
7	July	30	10:00 – 1:30	96
8	August	8	1:30 – 4:30	112
9	August	17	1:30 – 4:30	128
10	August	26	1:30 – 4:30	144
11	Sept	5	1:30 – 4:30	160
12	Sept	14	1:30 – 4:30	176
13	Sept	23	1:30 – 4:30	192

You would follow the same steps described here for High Volume stint sample to build the list of Low Volume stints. The list for the Low Volume stints in this example would cover all days the attraction is open to the public from October 1 through May 31 of an operating year. Each day would be divided into two time periods (as per High Volume). Once you list all possible stints, you would select a random start point and select every 33rd of the 420 possible day/time slots.

E. Counting attendees

If you have turnstiles or tickets that are collected at each entrance, your total number of entrants should be recorded for each possible stint.

Turnstiles: a staff member should record the number of entries through the turnstiles at each entrance at the *beginning* and *end* of each possible stint. The totals collected for each stint would be used to project the number of tallied and attendee survey responses you obtain during this stint.

Tickets: separate receptacles (boxes or envelopes) should be used to collect tickets for each possible stint and labelled to identify the entrance/time period they cover. A new box or other receptacle should be started at the beginning and sealed at the end of each possible stint. You can label and distribute these receptacles prior to opening the doors to your attraction. Tickets for each stint would be used to project the number of tallied and attendee survey responses you obtain.

If you do not have turnstiles or tickets at entry gates, you need to assign one or more staff to count visitors as they enter. Accurate counts of attendees are critical to projecting the people you tally and who complete an Attendee Survey to the total universe of attraction-goers in the various segments you plan to analyze.

1. What does the "counter" do?

You will require one or more people counting the number of attendees entering the attraction during your selected stints. If there are multiple turnstiles or entrances at a single location, you may need more than one counter to keep up with traffic, depending on how thick the flow of attendees is.

The counter literally counts each individual as he/she enters, using a paper and pencil, hand held computer or "clicker".

2. Adjusting "counts" to "tally" data for *excluded* attendees

Some of the people who enter your attraction during a stint may be counted by the counter, but will be staff members, volunteers or other "non-visitors" to the attraction (e.g., suppliers, media). Generally, these types of attendees are excluded from tourism economic impact assessments.

If any types of attendees are to be excluded from your final estimates, you will have to identify how many *excluded attendees* came to your attraction and remove them from your "counts". For this reason, the Tally Questionnaire includes a question about which type of entrant each person is. You would use this information to make the appropriate adjustments when you weight and project your tally information (see Section IV).

3. What happens if you "miss" a stint?

If you miss one of your sampled stints, you have several adjustment options.

- You can "replace" the missed stint with one that is most similar to it (same day of week and time period during one of the months that corresponds to the same strata as the missed stint , e.g., High Volume or Low Volume).

- If you cannot replace the missed stint because there is not enough time left in the time period under study (High Volume or Low Volume months), the stints you DID conduct will all have a higher stint weight than they would have had if you had conducted the "missed" stint.

IV. WEIGHTING AND PROJECTION PLAN FOR COUNTS AND TALLIES

A. Some basic concepts for weighting and projection

1. What is a weighting and projection plan?

A **weighting and projection plan** permits you to generalize from your *sample* to *all* attendees at your attraction. It is based on a sequence of arithmetical steps, using information you collected and compiled from **attendee counts** and **attendee tallies** conducted over the duration of your operating year.

2. Why you have to weight & project counts and tallies

Now that you have completed your tally and attendee counts, what do you know about your attendees?

- You know numbers of people who entered your attraction at particular times/locations; and
- You know the type of entrant (e.g., local, tourist, staff, volunteer, etc.), party composition and place of residence of a portion of the people who entered your attraction at particular times/locations (the portion you "tallied").

You need the same information you collected during counting and tallying for *all* the attendees who came to your attraction. How do you get this information for *all* attendees? You adjust your "sampled" counts and tallied stints to represent all of your attendees. To do this, you must develop and implement a weighting and projection plan.

3. Other important definitions

Following are several important definitions you will require for weighting and projection.

Record-by-record: a "record" is all the information collected from a single respondent. Thus, it would be a single "row" on the Tally Sheet or a completed Attendee Survey (questionnaire).

Household Travel Party: a household travel party, household party, or "party" is all the people travelling together and/or who came to the attraction together and who live in the same permanent residence. Because spending information is collected at the "household party" level but sampling and counting is done at the "person" level, for some parts of the weighting and projection process, it is necessary to convert between "people" and "parties".

The reason spending information is collected at the "household party" level is that an individual respondent may not have personally spent money on a spending category (e.g. gasoline, vehicle repairs, vehicle rental, accommodation) but someone else in the household group travelling

together ("party") would have spent money *on behalf* of this individual. By asking about *all* the money spent on various items by *everyone* in the household travel party, spending estimates are more accurate.

B. A step-by-step description of the weighting and projection process

Here are the steps in the process:

1. Convert tallied "party" to "people", on a record-by-record basis;
2. Apply attendee counts to tally "person" information on a stint-by-stint basis*;
3. Remove *excluded groups* from adjusted stint counts (excluded groups would be pre-defined and identified on your Tally Questionnaire. Categories might include staff, volunteers, media, etc.);
4. Expand "stints" to total attraction attendance;
5. Adjust for actual attendance;
6. Adjust for *unique tourists* (to take into account the possibility that the *same* tourist could be counted/tallied more than once on the *same* trip).

*See special note if you used *on-site* tally locations for a concentrated entry attraction (Section IV-B-1-c).

1. The weighting and projection process for stratified random samples

a) Step 1: Convert tallied "party" to "people", on a record by record basis

A "household party" is the measurement unit for the tally whereas an individual is the measurement unit for attendee counts. Thus, you need to convert household parties to individuals represented by each party in order to match the tally and count information for each stint.

The first step is to obtain a count of all the people tallied during a specific stint. You do this by summing all the *people* represented by the household parties tallied in each stint. This should be done on a stint-by-stint basis, adding up all the people represented by each household party that was interviewed during the tally process.

For example, if you tallied 9 parties during a stint, you would add up the number of people represented by each of these 9 parties. In this example, the nine parties would represent 31 people.

Stint 1	# of People in Party from Tally Form
Tally Record #	
1	3
2	4
3	1
4	2
5	6
6	3
7	2
8	2
9	8
Total	31
Repeat for Each Stint	

b) Step 2: Apply attendee counts to tally "person" information on a stint-by-stint basis

Each of the stints at which you were counting people represents everyone who entered your attraction at a particular time and location. These "counts" are used to estimate how many of the people you *tallied* came to your attraction at that same time/ location. You have information about each *tallied* party/person (e.g., place of residence, number in party, etc.) but you do not have similar information for all the people you "counted". In the following steps, you will create the "required factor" that allows you to apply the characteristics of the people you tallied to all the people you counted, on a stint-by-stint basis.

Example: Using the first row of the table below, let's assume you counted 250 people during Stint 1 (total persons who were counted by the "counter"). Your tally in Stint 1 represents 31 people (total persons captured by the "tallier"). To have the 31 people represent the 250 people you actually counted during the stint and to apply the characteristics of the "tallied" people to the "counted" people, you divide the Stint Person Count (SPC = 250) by the Stint Person Tally (SPT = 31). Each record in the SPT is then multiplied by the resulting factor, such that your adjusted tally equals the 250 attendees who arrived during the particular stint. As you will see later in the adjustment/weighting process, you require this factor in the final calculations that permit the people for whom you have attendee questionnaires to represent the correct proportion of all the people you tallied and all the people you counted.

For each stint, such as S_1:

(SPC ÷ SPT) * Each Tally Record in Stint = AST

Repeat this step for each stint (S_1, S_2, S_3, etc).

Stint	Stint Person Counts (SPC)	Stint Person Tallied (SPT)	Factor to Assign to each Tally	Adjusted Stint Total (AST) Once Applied to Tallies
			Required Factor	
S_1	250	31	**8.065**	250
S_2	122	17	**7.176**	122
S_3	230	46	**5.000**	230
S_4	89	28	**3.179**	89
S_5	179	58	**3.086**	179
S_6	136	65	**2.092**	136
S_7	268	83	**3.229**	268
S_8	122	17	**7.176**	122
S_9	230	46	**5.000**	230
Total	1,626	391		1,626

c) Special notes for concentrated entry *attractions*

A **concentrated entry attraction** is one in which most or all of the attendees arrive within a very short time span. Examples might include an attraction that provides cultural performances.

Attendee Counts: Counting of attendees would take place throughout the "peak" entry time.

Attendee Tallies: The entrance to the attraction would be **one** of the locations used for conducting tally interviews. In order *not* to slow down the crowds at the entrance, however, other sites will have to be selected for conducting tallies during the course of the attraction.

Additional on-site tally locations should be selected by attraction managers to coincide with locations and times *on the attraction site* where people can respond to the tallier's questions at their convenience. Typical locations include areas near refreshment kiosks and washroom facilities. At least two on-site locations in addition to the entrance should be selected for tallying stints.

If you use on-site locations for tallying attendees, you must obtain entrance/time information from the respondent when you conduct the tally interview because the tally interviews collected at *on-site* locations will be added to those collected at the stint that corresponds to their *entrance/time.*

If the entrance/time a tally respondent entered your attraction does *not* match a stint for which you conducted tallies (same entrance/time), you will have to identify a stint which most closely resembles the reported entrance/time period for which you *did* conduct tally interviews and "assign" the on-site completed tally interview to this "surrogate stint".

d) Step 3: Excluding staff, volunteers, etc. from adjusted stint counts

Some people who entered your attraction and were counted during a stint may be *excluded attendees.* Excluded groups might include paid or unpaid attraction staff including volunteers, representatives of the media, etc. If you are conducting a tourism economic impact assessment, these individuals must be removed from the tallies.

Generally the people who will be excluded from the final counts are *local* but may be people from outside your community. Because the proportions of excluded attendees are likely to vary by place of residence, it is recommended that you adjust for exclusions separately for each major "place of residence" category. Depending on your attraction, you may not need to identify these excluded groups (volunteers, staff, vendors, etc.) in your tally and go through these special calculations to "take them out" of your estimates because you have other ways to estimate how many people the excluded groups represent.

For example, if all excluded categories of entrants go through a special entrance (one that is not open to the general public), you would exclude this entrance from your sampling frame, exclude the question from the Tally Questionnaire and ignore the calculation described here. Attraction managers may also know the number of people who would fall into "excluded groups" and would not, therefore, need to generate an estimate of these individuals.

e) Step 4: Expand "stints" to total attraction

Each one of your stints will have to be adjusted to stand for time periods and locations in which counting and tallying did *not* take place. Now that you know how many people each sampled stint should represent, you must adjust the sample to the full operating year for all attendees at the attraction.

The following example assumes that you used a stratified stint sampling plan (e.g., sampled June through September differently than October through May).

Total **June-September** stints (204) ÷ Sampled stints (13) = Stint Weight (15.69)

Total **October-May** stints (420) ÷ Sampled stints (13) = Stint Weight (32.31)

Example: Stratified Random Sample Weighting & Projection (Tallies)							
June-Sept Stints	Stint Person Counts (SPC)	Stint People Tallied (SPT)	Factor to Assign to each Tally	Adjusted Stint Total (AST)	Adjusted for Excluded Categories	Stint Weight	Total Attendees Represented by Tallies
S_1	250	31	8.065	250	237.47	15.69	3726
S_2	122	17	7.176	122	112.44	15.69	1764
S_3	230	46	5.000	230	224.12	15.69	3516
S_4	89	28	3.179	89	87	15.69	1365
S_5	179	58	3.086	179	169.63	15.69	2661
S_6	136	65	2.092	136	130.47	15.69	2047
S_7	268	83	3.229	268	260	15.69	4079
S_8	122	17	7.176	122	115.29	15.69	1809
S_9	230	46	5.000	230	219.12	15.69	3438
S_{10}	136	65	2.092	136	130.47	15.69	2047
S_{11}	268	83	3.229	268	260	15.69	4079
S_{12}	122	17	7.176	122	115.29	15.69	1809
S_{13}	230	74	3.11	230	230	15.69	3609
Total	2,152	556		2,152			35,950

Oct-May Stints	Stint Person Counts (SPC)	Stint People Tallied (SPT)	Factor to Assign to each Tally	Adjusted Stint Total (AST)	Adjusted for Excluded Categories	Stint Weight	Total Attendees Represented by Tallies
S_1	150	31	4.8387	150	135	32.31	4362
S_2	76	17	4.4705	76	68	32.31	2197
S_3	89	46	1.9347	89	80	32.31	2585
S_4	60	28	2.1428	60	54	32.31	1745
S_5	102	58	1.7586	102	92	32.31	2973
S_6	135	43	3.1395	135	135	32.31	4362
S_7	64	37	1.7297	64	58	32.31	1874
S_8	78	22	3.5454	78	78	32.31	2520
S_9	102	36	2.8333	102	92	32.31	2973
S_{10}	135	65	2.0769	135	122	32.31	3942
S_{11}	64	27	2.3703	64	58	32.31	1874
S_{12}	122	29	4.2068	122	110	32.31	3554
S_{13}	89	46	1.9347	89	80	32.31	2585
Total	1,266	485		1,266			37,544

f) Step 5: Adjustment for actual attendance

If there is an admission fee to the attraction, the total number of people in your sample should be the same number as the number of admissions sold. Because sampling is not always perfect, however, you may adjust the "sample" to the known number of tickets used to enter the attraction. If you have this information on a day-of-week basis, you should sort your stint estimates into these groups and adjust each group individually. Thus, you might combine attendance figures for all the weekdays in June (e.g., Mondays-Thursdays) and all the weekend days (e.g., Fridays-Sundays) in June and adjust the total attendees represented by tallies for stints on these days (weekdays and weekends in June). You would repeat this step for each operating month.

	Stint	Actual Attendance			Total Attendees		Total
		Weekdays in June	Weekends in June	Weekdays in July	Represented by Tallies	Attendance Adjustment	Adjusted Attendance
Weekdays in June		2,500			1,764	1.417	2,500
	S_2				1,764	1.417	2,500
Weekends in June			7,750		7,242	1.070	7,750
	S_1				3,726	1.070	3,987
	S_3				3,516	1.070	3,763
Weekdays in July				2,800	2,661	1.052	2,800
	S_5				2,661	1.052	2,800

You would continue this adjustment for all stints in each of your High and Low Volume strata. If you do not have stints in each of the categories you have selected for adjustment, you will need to combine attendance figures into larger groups. In our example, you might have to combine weekdays in the "Low Volume" stratum for more than a single month because you may not have *any* weekday stints in some of the months.

2. Estimating attendance by place of residence

Now that you know how many attendees each party in your tally represents, you are ready to estimate the proportion of attendees from various origin groups. This is a critical element in generating reliable inputs for economic impact estimation. In other words, these are the numbers you went to all the trouble to obtain by sampling, counting, tallying, weighting and projecting.

Once you have calculated the total attendees for each type of stint, you would determine how many of the projected and weighted tallied individuals are local residents, non-locals from other parts of the community's province/territory or state, from other provinces, territories or states, and from foreign countries. Some of the people who enter your attraction during a stint may be counted by the counter, but will be staff members or volunteers. In the *exclusion weight,* you will adjust your estimates to exclude these attendees.

These ratios are required in order to estimate how much spending associated with your attraction derives from the local community and how much is coming in from other places. As shown below for 2 sample stints, the number of attendees from each origin in each stint is multiplied by all the weights to arrive at the final ratios.

Once you have converted your stint parties to people, you would calculate the share each stint represents of total attendance for each origin group included in your tally sheet.

The Calculation:

(People Tallied by Place of Origin * Stint Count Weight * Exclusion Weight * Stint Weight * Attendance Weight) = Weighted, Projected Attendees

Stint		Tallied Attendees	Stint Count Weight	Exclusion Weight	Stint Weight	Attendance Weight	Weighted, Projected Attendees
S_1	**Total**	**31**	**8.065**	**0.998**	**15.69**	**1.07**	**4,264**
S_1	Local	20	8.065	0.998	15.96	1.07	**2,749**
S_1	Non-local – Same Province/Territory/State	9	8.065	0	15.96	1.07	**1,240**
S_1	Other Provinces/ Territories/States	1	8.065	0	15.96	1.07	**138**
S_1	Other Country	1	8.065	0	15.96	1.07	**138**
S_2	**Total**	**17**	**7.176**	**0.999**	**15.96**	**1.417**	**2,757**
S_2	Local	10	7.176	0.999	15.96	1.417	**1,621**
S_2	Non-local – Same Province/Territory/State	3	7.176	0	15.96	1.417	**487**
S_2	Other Provinces/ Territories/States	2	7.176	0	15.96	1.417	**325**
S_2	Other Country	2	7.176	0	15.96	1.417	**325**

Repeat these calculations for all stints.

In this example, of the 7,021 weighted, projected attendees (4,264 from stint 1 + 2,757 from stint 2) 62% were residents of the local community, 25% came from other parts of the province/territory or state, 6.6% live in other provinces/territories or states, and 6.6% live in foreign countries. When you go through these procedures, you would calculate the total visitation by origin for *all* stints (see table on following page).

Weighted, Projected Visitors, Stints 1, 2 by Place of Residence						
Place of Residence	Stint 1		Stint 2	Total	Percent
Total (All)	4,264	+	2,757	= 7,021	100%
Local	2,749	+	1,621	= 4,370	62.2%
Non-local – Same Province/Territory/State	1,240	+	487	=1,726	24.6%
Other Provinces/Territories/States	138	+	325	= 462	6.6%
Other Country	138	+	325	= 462	6.6%

3. What do you do with the ratios by place of residence?

You will apply the ratios by place of residence to the information you collect on spending and other characteristics of the trip that brought the person to the community and the attraction. In turn, these ratios will enable you to calculate total spending at the attraction and in the community and to determine how much of this spending is *incremental* because the attraction attracted *tourists* to the community **[Note: an extra procedure is required to estimate *unique* attendees for *tourists* who may have come to your attraction on more than one sampled period during their stay in your community. See below for details].**

4. Step 6: special adjustment for *unique tourists*

The final adjustment you will make to each *tourist* questionnaire is designed to ensure you are not counting the *same* trip spending more than once. How could this occur?

Remember that tourists are asked to report their total spending in your community for the full duration of the trip. Thus, a tourist who attends your attraction more than once on the same trip would be included in your total attendance estimates more than once because you have projected your stint data to *all* attendees. In other words, when you count up all your attendance figures day after day, you have no way to know in advance that some of the people in your attendance data are actually the same tourists who have come on more than one day of their trip.

Using the projection and weighting procedures described up to this point in the process, trip spending reported by the tourist who comes on more than one day would be treated as if he or she were a "different" tourist on each day. If we did not take into account his/her multiple visits to your attraction on different days of the same trip, we would be assuming that each "trip spending estimate" represented a different trip and would, in turn, overestimate the amount of spending in your community by tourists.

Here's an example to explain why this final step is required.

Karen and Fred go to your attraction on Thursday and Friday and report spending $600.00 in your community for their entire stay. They "stand for" two visitors (one household visitor party) in your total attendance estimates for BOTH Thursday and Friday. When you have applied all the weights and projections to their information, Karen and Fred will seem to have spent $600.00 on their trip to your community associated with the Thursday visit and $600.00

associated with the Friday visit to your attraction. But, in fact, Karen and Fred spent $600.00 in your community in total.

To estimate the number of *unique* tourist household parties that attended your attraction over the full duration of their visit in your community, you need to adjust for the number of different days the *same* household party might attend on the *same* trip. If the same tourists make a *new* trip to your community, they would be counted as *new* tourists. In other words, they would be treated as if they had never visited your community or attraction in the past.

The adjustment for unique tourists applies only to non-local surveys. To make this adjustment, you will rely on responses to the question in the Tally Questionnaire that captures information on the number of different days the household party has or plans to come to your attraction on the *same* trip.

The steps required for this adjustment are described in the following paragraphs.

You must divide your final estimates of tourist attendees by the number of different days each tallied tourist attendee party came to your attraction, on a record-by-record basis. Here is an example:

Household 1: 4 people, plan to go to your attraction on 1 day of their stay.
Household 2: 4 people, plan to go to your attraction on 2 days.
Household 3: 4 people, plan to go to your attraction on 3 days.
Household 4: 2 people, plan to go to your attraction on 1 day.

The calculation to obtain unique tourists (on a record-by-record basis):

(**People Tallied by Place of Origin * Stint Count Weight *Exclusion Weight * Stint Weight *Attendance Weight) ÷ (Number of Days Attended or Plan to Attend Attraction From Tally Questionnaire)**

In the following example, once all the weights have been multiplied, Household 1 will have a final weight of 549.81 and Household 2 will have a final weight of 244.85, etc. These final weights are embedded in the data file for the respective questionnaire so that each time information about Household 1 is used in your tabulations, it represents approximately 550 tourists and their trip spending in your community. Similarly, Household 2's weight will be embedded in the data file such that this record will represent about 245 (244.85) unique tourists and their spending in your community.

	People Tallied by Place of Origin	Stint Count Weight	Exclusion Weight	Stint Weight	Attendance Weight	Sum Of Attendees On All Days	# Of Days At Attraction	Unique Attendees [Final Weight]
Household 1	4	8.065	0.998	15.96	1.07	549.81	1	549.81
Household 2	4	7.176	0.999	15.96	1.07	489.69	2	244.85
Household 3	4	7.176	0.999	15.96	1.07	489.69	3	163.23
Household 4	2	8.065	0.998	15.96	1.07	274.90	1	274.90

V. THE TALLY INTERVIEW PROCESS

A. The interviewers

1. A critical component of the research process

Interviewers are a critical component of the research process. They are the link between what you need to know from your attendees and what you find out about them (characteristics, spending, etc.). If interviewers do a good job, the quality of your information improves. If they do a poor job, the quality of your information deteriorates.

In the following sections, general principles for selection, training and supervision are provided but you are encouraged to find additional resources to ensure that your interviewers are in the best possible position to do a "good job". For additional information on these topics, contact your local economic development office, local colleges or universities, and/or research professional organizations such as the Travel and Tourism Research Association (TTRA, www.ttra.com), Marketing Research and Intelligence Association (Canada) (MRIA, www.mria-arim.ca), or Marketing Research Association (U.S.A.) (MRA,, www.mra-net.org).

2. Selecting interviewers

Whether you use local volunteers who will conduct the surveys, hire students or other local people or use professionally trained interviewers, the people involved in the survey process at your attraction should have the following characteristics*:

- Good communication skills: enunciate well, use language appropriate for interviewing visitors.
- Good interpersonal relations skills.
- Be socially mature.
- Be friendly and outgoing.
- Be good at keeping conversations on track.
- Be good independent workers with a strong work ethic.
- Be able and willing to work irregular hours (such as evenings or weekends).
- Be comfortable using computer programs for data entry and record keeping if this will be part of their work.

*List from *A Guide To Designing and Conducting Visitor Surveys*, Julie Leones, Arizona Cooperative Extension, College of Agriculture, The University of Arizona, September 1998

3. Training interviewers

a) Two basic types of training

Two basic *types* of interviewer training are required:

Type I: general understanding of the survey process, the objectives of the study, general deportment, the importance of administering the questionnaire exactly as it is written, and how to handle "difficult respondents" and unforeseen circumstances.

Type II: familiarity with the survey instruments, including practice interviews to ensure that interviewers are conversant with the language and flow of the questions, skip patterns, and response categories, respondent selection guidelines, etc.

b) A training plan

Interviewing is harder than you might think! While these guidelines provide some training tips, we strongly suggest that you develop and implement an interviewer training plan, particularly if you will be relying on interviewers who have limited or no prior experience. The following list* covers some Type I and Type II elements required of a training plan.

- Explain the objectives of the study and what the main questions are that you wish to answer.
- Go through the survey instrument thoroughly.
- Have the interviewer practice interviewing you and other interviewers before interviewing a visitor.
- Train interviewers in the use of the data entry program you are using and have written instructions on how to use the program (if appropriate).
- Show interviewers how to save data files and help them understand how and why to make back up copies of data files.
- Teach interviewers about the different components of an interview.
- Explain to interviewers that how they ask questions will affect response.
- Train them in good interviewing technique (see next section).
- Show the interviewers what records they must keep and why these are important.

*List from *A Guide To Designing and Conducting Visitor Surveys*, Julie Leones, Arizona Cooperative Extension, College of Agriculture, The University of Arizona, September 1998

4. Supervision

An on-site supervisor must be available to interviewers at all times. More than one supervisor may be required on-site, depending on how large the site is and how many interviewer crews are working at any one time. A supervisor's tasks would include the following*:

- Ensure that the required numbers of interviewers are at their designated locations at the correct times.
- Circulate among survey locations.
- Collect and check their data files regularly.
- Monitor them at work periodically.
- Encourage them to find ways to do the survey more efficiently or effectively.

- Praise and reward them for good work.
- Warn them and then help them if they are having trouble doing the work involved.
- Give them some flexibility with regard to the days and hours that they work.

*List from *A Guide To Designing and Conducting Visitor Surveys*, Julie Leones, Arizona Cooperative Extension, College of Agriculture, The University of Arizona, September 1998

B. Interviewing

1. Conducting the interview

a) Identification and support materials

Interviewers require some form of "official identification" (i.e., photo-ID badge or letter from attraction managers indicating that they are conducting an official survey with the sanction of the attraction). You might also consider some form of "uniform". This can be a printed t-shirt, smock or cap with "Official Survey" or a similar identifying label so attendees can readily identify them.

Because interviewers will "look" official, attendees may approach them to obtain information about the attraction. Consequently, you should provide interviewers with general knowledge about the locations of key amenities (food services, washrooms, etc.). Attraction managers should brief the interviewers and provide them with appropriate materials so they can answer basic questions and instruct them to direct attendees to appropriate staff if they have questions or concerns.

Interviewers also require a way to contact a supervisor or attraction manager (e.g., cell phone number) in case a respondent wants to call to verify that interviewers are bona fide, if they are experiencing difficulties with a respondent, or in the case of an emergency.

b) Some basic interviewing techniques

As noted above, the success of your study hinges on the interaction between the interviewer and the respondent. Consequently, we recommend that you invest in interviewer training by professionals. These professionals can amplify on the points raised below* and customize the training to match your survey materials (sampling plan, questionnaires, etc.).

1. An interview consists of three basic parts: an introduction, the interview proper and the end.

- In the introduction, you need to introduce yourself, explain what the survey is about, who is sponsoring it and how long it takes to complete it. Then you need to ask the person if they would be willing to be interviewed.

- In the interview proper, you need to carefully follow the questionnaire format provided.

- The end of the interview involves thanking the respondent for their time and bidding them good-bye. If you have an incentive of some sort to give them, this is the time to present it. It is also a good time to provide any information that the respondent may want concerning area attractions, lodging, shopping or restaurants. Make sure that you have been provided with information about these amenities so that you can pass information on to respondents.

2. Try to keep the interview as conversational as possible, but do not modify the question wording. However, if it is clear that the person did not understand the question, rephrase the question or ask it in a different way.

3. If you are not sure you have understood the response or the response is incomplete, try one of the following techniques:

- rephrase what the person has said, say it to them, and ask them if you understood them correctly. For example, "I understood you to say that you are just passing through the area, is that correct?"

- ask the person if they can rephrase their comment or explain further. For example, "Can you tell me a little more about why you are visiting our area?"

4. Use responses from earlier questions to check responses of later responses, especially in the expenditure section. For example, you are asking about other expenses and the person gives you a very low estimate. You might ask: "Does that include the admission fees to the attractions that you mentioned visiting earlier?"

5. Be careful how you ask follow up questions to make sure that they are not insinuating something or suggesting a certain response. Leading questions or a leading tone of voice can bias responses to a question. As much as possible, ask questions in a neutral way since there are no right or wrong answers to the questions.

6. You may need to develop methods for getting respondents back on track if they begin talking in detail after one particular question. For example, a respondent is going on in detail about how much they are enjoying their trip. The interviewer might affirm what they say and move on to the next question: "I am glad you are having a good time in our community, how many nights are you planning to stay?"

7. Interviewers need good listening skills. This includes paying careful attention to what people say, looking alert and interested in the interview, giving appropriate verbal and nonverbal cues that show that you are interested and paying attention.

*From *A Guide To Designing and Conducting Visitor Surveys*, Julie Leones, Arizona Cooperative Extension, College of Agriculture, The University of Arizona, September 1998

2. Stopping an attendee to ask questions using a selection interval (every *nth*)

When approaching people as they enter the attraction, interviewers need to do so in a "random" manner. Randomness at the respondent selection stage is very important to ensure that the final sample you include in your study is representative of *all* types of attendees (those who look friendly and those who don't look so friendly, those with and without young children, old and young, etc.). The easiest way to achieve randomness at the selection stage is to have the tally interviewer approach **every *nth*** (e.g., every 5th) person as he/she enters the attraction and attempt to obtain this person's cooperation.

The number of people stopped should follow a fixed interval in order to randomize the sample of people who are included in the tally process. By instructing interviewers to select every *nth* person, you will insure all types of attendees are included in the tally – not just the ones that look friendly or easy to approach.

If flows are very brisk at the entrance, the interval could be every 3rd or every 5th person that enters. If, however, the entry flow is very slow, the tally interviewer could be instructed to approach "the next" individual who enters after the previous tally questionnaire is completed.

3. The tally unit is a *household party*

Even though the interviewer will approach a *person,* the unit for collecting tally information is the *household party.* Thus, once the interviewer has secured the attention of the *person,* he or she will ask that this person and others in the immediate group step out of the flow of traffic for the interview. The tally questionnaire will aid the interviewer in determining how many *different* people are in the respondent's household party. Each tally interview should represent *all* people in the household party (people who live in the same permanent residence and came to the attraction together).

4. The tally questionnaire

a) General comments for recruiting Attendees for the Attendee Survey

In the tally interview, you will obtain the information you require to weight and project the information you collect from your **Attendee Survey**. We also recommend that you use the tally interview to *recruit* respondents for the Attendee Survey and provide them with a copy of the self-completion Attendee Questionnaire to complete at the end of their visit if they agree to participate in the study. Questions associated with the recruitment task included in the tally questionnaire will vary somewhat, depending on how you plan to undertake the Attendee Survey. Different approaches to identifying the sample for the Attendee Survey are listed below. Each will require customized questions or descriptions of procedures in the tally interview.

TAG If you plan to select and "tag" attendees when they enter the attraction so that you can conduct a face-to-face interview with the individual as he/she exits the attraction, your tally

interview would include a question about permission to provide an identifying tag and instructions about interview locations on the site.

TELEPHONE CALL-BACK If you plan to obtain a telephone number and call the respondent back when he/she returns home to conduct the Attendee Survey by telephone, you would have statements that describe this procedure to potential respondents.

ON-SITE RANDOM SELECTION If you plan to approach attendees on a random basis while they are at your attraction to conduct the Attendee Survey, you require a separate stint sampling plan for the Attendee Survey.

SELF-COMPLETION MAILBACK questionnaires can be distributed as attendees enter or exit the site or mailed to them at their place of residence. The system of "returns" can be drop-offs on site, by return mail or on a website. Follow-up with telephone calls or e-mails to non-responders is generally required to ensure sufficiently high response rates to the self-completion questionnaire.

WEB SURVEY A website on which the Attendee Survey has been mounted can be constructed. Respondents would be given the site's unique web address and asked to complete the survey once they have access to a computer.

The basic elements of the Tally Questionnaire are the same, no matter which approach to the Attendee Survey you adopt.

b) Paper & pencil or computers

Tally Questionnaires can be "paper and pencil", with interviewers recording the information on printed sheets for subsequent data entry and tabulation or they can be pre-programmed into hand-held or laptop computers. The availability of equipment, weather and site conditions will determine the most effective way to administer the Tally Questionnaire. Remember that if you use a "paper and pencil" approach, you will require the tools and expertise to input tally data into a software system that will permit the weighting and projection of this information.

c) Sample questionnaire and tally sheet

Sample on-site tally questionnaires and tally sheets are provided in Appendix VI (under separate cover).

5. Required tally Information

a) Stint identification

Every assigned stint in your study should have a unique number. This number should be recorded on each tally sheet and each set of materials provided for counting entrants.

b) Interviewer Identification

The interviewer's name should be recorded on each tally sheet for quality control.

c) Refusals

You must be able to measure the response rate to the tally process. Thus, you must have a mechanism in the tally process to record the number of people who decline/refuse your efforts to interview them as they enter your attraction.

d) Map

Each tally interviewer should have a map that clearly identifies the area you consider to be *local*. Key landmarks within and outside the local borders might be marked on the map to help people from *outside* the local area understand the local geography. A map with clear boundaries of the areas for which you plan to estimate economic impact is an essential component of the research process.

e) Greeting

To start the interview, the interviewer requires a script. The following sample would be customized to the particulars of your attraction.

Hi, my name is XXXX INTERVIEWER'S FIRST NAME. Welcome to NAME ATTRACTION. Before you start your visit here today, I'd like to ask you just a few questions so we can learn more about who is coming to this attraction. (TO TAKE RESPONDENT OUT OF TRAFFIC FLOW: Could you and others who are here with you today just step aside for a couple of minutes?)

f) Previous tally

In order to ensure that the respondent has not been interviewed elsewhere on the site on the *same day,* you need to ask this type of question. If your attraction has only one point of entrance, you might consider excluding this question.

If a respondent has already been interviewed, the interviewer should thank the respondent and politely terminate the interview.

Have you already been stopped to answer questions about NAME ATTRACTION today?

No	[ ]	
Yes	[ ]	IF YES, THANK RESPONDENT & TERMINATE

g) A special note about "Previous Tally"

These guidelines provide an Attendee Survey design that captures *all* spending on the site and *all* spending for the stay in the community by attendees for *all* of their visits to the site and for the

full duration of their stay. Attendees will be *counted* and *tallied* independently on each day they attend the attraction but would be asked to complete only ONE Attendee Survey, covering the full duration of their stay in the community. If *local residents* are included in the Attendee Survey, they too will be asked to complete only one Attendee Survey for all the days they visited the attraction's site.

h) Gate & time of entry

This question is required *only* if you conduct tally interviews at on-site locations such as refreshment kiosks, washroom line-ups, etc. The information is necessary to link the tallied party to entry counts for the attraction.

At which location and time did you first enter the site today?

Location	(pre-list to correspond to entrances)
Time Period	(pre-list to correspond to stint time periods)

i) Place of residence - local

It is critical that you are able to distinguish *local residents* and *non-locals* in the tally and Attendee Surveys. Thus, particular attention should be paid to collecting place of residence information completely and accurately.

Is XXXX (NAME CITY/TOWN IN WHICH ATTRACTION IS TAKING PLACE) your permanent place of residence (SHOW MAP*)?

No	[ ]	(These people would be asked city/town, postal code and out-of-town trip questions.)
Yes	[ ]	(These are Locals and would NOT be asked city/town, postal code or out-of-town trip questions.)

*The map should display clear boundaries of what the attraction has defined to be the "local area".

j) Place of residence - other

IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF ATTRACTION, ASK: In which city/town, province/territory/state/country is your permanent residence? IF CANADA OR USA, ASK: And what is your postal/zip code?

City/Town	_____
Province/Territory/State	_____
Country	_____
IF CANADA/USA: Postal/Zip Code	_____

k) Identifying tourists and overnight tourists

IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF ATTRACTION, ASK: Are you on an out-of-town trip from your permanent place of residence?

No [ ]
Yes [ ]

IF YES, ASK: Have you or will you be spending at least one night away from home on this trip?

No [ ]
Yes [ ]

l) Household party size

The unit of selection for the tally process is a "household party". It is necessary to collect the number of people included in this household party and the class of ticket they purchased (in order to match the units of tickets sold).

A **household party** is a group of people who enter the site together and who live in the same household. As the spokesperson for this party (respondent), you will need to identify an individual who is *best able to report on spending for all members of the party*.

Some examples are provided on the following page.

Examples:

Four young adults enter the site together. Each of these individuals represents a separate party if they live in different households.

Six people enter the site together -- the grandparents (2 people) taking their grown children (2 people) and grandchildren (2 people) to the attraction. If the grandparents live in the local community and the rest of the family is visiting from a different community, the grandparents represent one "household party" (2 people) and the grown children/grandchildren represent a separate household party (4 people) because they live in separate residences.

Group Tours: you may need to clarify whether members of a "group tour" are reporting the size of their "immediate household party" or the entire group tour. You want the "immediate household party". You do *not* want "all the people on the bus" or in the group tour. A separate question may be required to identify those travelling as part of a "group tour" if you expect your attraction to attract considerable motorcoach tour traffic.[10]

[10] The assumption here is that the attraction does not attract a significant number of attendees arriving as part of a tour group (e.g., bus tours). If an attraction does attract a significant number of tour groups, it may be appropriate to over sample these attendees. Attraction managers may need to seek expert advice in creating a sampling and analysis plan that incorporates a separate stratum to over sample tour group attendees.

If **children** are "free" to enter the attraction, they need to be counted separately in the tally. The age you set for these "children" should correspond to the age limit for free admittance and/or the age of the people you plan to *count* as they enter the attraction.

How many people who live in your household came to NAME ATTRACTION with you today?
IF MORE THAN ONE PERSON IN PARTY, ASK: And how many, if any, of these people are under [XX] years of age? [The age you insert will depend on how you plan to define the sampling unit. See Tally Procedures.]

Total number in household travel party _____
Number under [XX] years _____

m) Purpose of visit (excluded categories)

How many people in your group, if any, are [Are you*] here as staff, media or a volunteer to help at the attraction today? RECORD OPPOSITE APPROPRIATE EXCLUDED CATEGORY. IF ALL PARTY MEMBERS ARE "EXCLUDED", RECORD ON TALLY SHEET & TERMINATE

Staff _____
Media _____
Volunteer _____
*wording change required if a one person party

n) Type of ticket(s) used

Which type of ticket(s) did you use to enter NAME ATTRACTION today? OPTIONAL, depends on circumstances of Attraction. See Tally Procedures)

Individual day ticket [ ]
Individual attraction pass [multi-day pass] [ ]
Family day ticket [ ]
Family attraction pass [multi-day pass] [ ]
NO TICKET (Comp., Vendor, Staff, etc.) [ ]
OTHER (WRITE IN) _____

o) Number of days have/plan to attend attraction: out of town attendees only

IF OUT-OF-TOWN VISITOR: Over the full course of your planned stay in this area, on how many different days have you/do you plan to visit this attraction, counting today's visit?

WRITE IN NUMBER OF DAYS _____

DON'T KNOW/CAN'T ESTIMATE [ ]

C. Recruitment for attendee survey

1. Additional questions required in tally interview

If you were planning to use the tally procedure to recruit participants for the Attendee Survey, you would add the appropriate "recruitment" questions at the end of the tally questionnaire.

We recommend that you distribute a self-completion questionnaire to attendees as they are tallied and collect the completed questionnaire as people exit the site for the *last time* or return via the mail (you need to provide postage paid envelopes for them, ensuring that the postage is

appropriate to the country from which they may mail the completed questionnaire – e.g., Canada or USA postage).

This method is recommended because it is the most efficient way to obtain Attendee Surveys from "hard to find" attendees (e.g., tourists) and involves the least investment in interviewer time, training and supervision.

If you plan to collect completed Attendee Surveys as people exit your attraction, you will require collection receptacles and staff at exit points reminding attendees who might have been given surveys to complete and leave them at the site. Ideally, you would have tables and chairs in a protected area near points of exit so that exiting attendees can complete the questionnaire just before they leave. A "Complete your Survey Here" sign would also encourage attendees to stop and complete the questionnaire before they leave the site. A supply of pencils should also be available.

2. Incentives

To enhance your response rate, we recommend that you offer an incentive to people who complete and return the Attendee Survey. The incentive could take the form of a souvenir of the attraction itself, a small cash gift (e.g., $1.00), or a chance to win a prize in a "lucky draw". Local merchants can often be called upon to provide souvenirs or prizes. To ensure responses that are not biased, avoid incentives that not all visitors would enjoy equally (i.e., golf clubs, tickets to an out of town attraction, etc.).

3. Recruitment for self-completion attendee survey at tally stage

We recommend that you have two versions of the Attendee Survey questionnaire: one for people who live in the local community and a different one for tourists.

If you have selected a distribution interval such that every 5th or every 10th local household party would be asked to complete the Attendee Survey, tally interviewers will have to keep track of the interval as they distribute questionnaires.

Because tourists are generally harder to find at an attraction than locals, you may wish to distribute an Attendee Questionnaire to *all* tourists.

Because we recommend that different Attendee Questionnaires be used for local and tourist household parties, interviewers will have to check the place of residence question in the tally interview to determine which script to use and which questionnaire version to distribute.

Each Attendee Questionnaire should be *pre-numbered* with a unique identification number (ID). This number would be recorded on the Tally Sheet as the questionnaire is distributed. The purpose of this unique ID number is to permit you to know who did and who did *not* return a completed questionnaire. Those who did *not* return a questionnaire could be re-contacted by telephone or email and encouraged to complete and return the survey.

Because different questionnaire versions are recommended for *local* and *tourist* parties, we

suggest that you pre-number each version of Attendee Questionnaires using a different series (e.g., L-0023 for a "local" and T-0045 for a "tourist").

a) Recruitment questions for locals at attraction

ASK EVERY *nth* LOCAL: In order for us to learn more about your reactions to NAME ATTRACTION and your spending here, would **the person most able to report on spending** for all people in your household please complete this short survey just before you leave the site today? You can drop the completed questionnaire in one of the specially labelled boxes near the exits or return it to us by mail in the postage paid envelope we have provided.

IF THERE IS AN INCENTIVE, CONSTRUCT THE APPROPRIATE STATEMENT: As a thank you for your cooperation, once we have your completed survey, we will provide you with/ you will have a chance to win [NAME PRIZE], etc.

Refuses to accept questionnaire	[ ]	
Accepts questionnaire	[ ]	RECORD UNIQUE ID FROM Q'AIRE ON TALLY SHEET

IF ACCEPTS: Could I please have a local telephone number and the first name of the person who will complete this survey, just in case we have to follow-up on any of your answers?

RECORD LOCAL PHONE NUMBER
RECORD FIRST NAME OF RESPONDENT

b) Recruitment questions for non-locals

Have you or has anyone else in your household party received a questionnaire to complete, either today or on a previous day you came to the attraction *during this trip*?

No	[ ]	GO TO NEXT QUESTION
Yes	[ ]	You need only complete one questionnaire for all your visits to this attraction on this trip. Thank you for your cooperation and enjoy your stay here today.

In order for us to learn more about your reactions to NAME ATTRACTION and spending on your trip, would **the person most able to report on spending** for all people in your household who are on the trip with you please complete this short survey just before you leave the site today? You can drop the completed questionnaire in one of the specially labelled boxes near the exits or return it to us by mail in the postage paid envelope we have provided.

IF USING AN INCENTIVE, CONSTRUCT THE APPROPRIATE STATEMENT: As a thank you for your cooperation, once we have your completed survey, we will provide you with/ you will have a chance to win [NAME PRIZE], etc.

Refuses to accept questionnaire	[ ]	
Accepts questionnaire	[ ]	RECORD UNIQUE ID FROM Q'AIRE ON TALLY SHEET

IF ACCEPTS: Could I please have a telephone number (including area code) where I can reach you at home and the first name of the person who will complete this survey, just in case we have to follow-up on any of your answers?

RECORD PHONE NUMBER
RECORD FIRST NAME OF RESPONDENT

VI. COUNTING ATTENDEES

A. Units for counters

If you are using turnstiles, it is likely that *all* entrants to your site will pass through the turnstile. Thus, your counts would likely include adults and children. When reconciling tally information and entry counts, you will need to keep this fact in mind.

If you are collecting ticket stubs as a way of counting attendees, you need to determine if you are going to keep a stub for *all* entrants or for adults only. When reconciling tally information and entry counts, you will need to use the same unit you used for ticket stubs.

If you are assigning interviewers to count entrants during a sample of stints, you must provide them with clear direction about *who* to count – adults or all entrants, including children. You would use the same units for projecting your tally interview data to total attendance.

B. Stint-by-stint counts

Regardless of how you count entrants to the attraction, you must keep track of the counts *by stint.*

TURNSTILES If you are using turnstiles, you would obtain the count reading on the turnstile at the beginning and end of each stint. Ideally, you would collect this information for stints in which you are tallying and those in which you are not. This information would be used for weighting and projecting the tallied attendees to all people who entered the attraction during the Tally Stint and for identifying the total number of attendees who entered the attraction during "similar" stints.

TICKET STUBS If you were collecting tickets as the tool for counting attendees, you would require separate receptacles for tickets that correspond to each stint. The receptacles should be labelled with a unique stint ID. Once the attraction is over, you would count and record the number of tickets collected on a stint-by-stint basis. This information would be used for weighting and projecting the tallied attendees to all people who entered the attraction during the Tally Stint and for identifying the total number of attendees who entered the attraction during "similar" stints.

COUNTERS If you are relying on staff to count entrants during assigned (or all) stints, the staff must record entrants such that the total for each stint can be identified. You can design a simple form for recording this information on a stint-by-stint basis, using the unique stint ID.

VII. ATTENDEE SURVEY ANALYSIS PLAN – NON-LOCALS

A. An overview

Once your Attendee Surveys have been completed, they must be transformed into a data file for tabulation and analysis. The steps in converting questionnaires into spending information for input to a tourism economic impact model are complex. For this reason, we highly recommend that you engage the services of professional research and tabulation experts and provide them with these guidelines to complete this part of the process.

The tasks required to transform *questionnaire responses* into estimates to be used as inputs to a tourism economic impact model include:

1. Creating a "raw" data file (includes coding, keying, verification)

2. Creating a "clean" data file (includes editing, assignment of information for missing values and distribution of aggregated spending to categories)

3. Assigning reported, allocated or attributed spending to *geographic areas*

4. Constructing an "Attraction Account" (identification of spending in the community and larger area that is *incremental)*

5. Weighting and projecting survey responders to all non-local attendees.

These steps are described in greater detail in the sections that follow. Sample Attendee questionnaires are provided in Appendix VII (under separate cover).

B. Creating a "raw" data file

1. What is a "raw data file"?

A "raw data file" is an electronic version of the information provided by the respondent in a completed questionnaire before any editing or adjustments have been made.

2. Unique respondent ID

When distributed, every questionnaire should have been given a unique identification number that is recorded on the Tally Sheet (for follow-up with non-responders). You can use this number as the "respondent ID" or you can assign a new number series to all returned questionnaires. Whichever number you decide to use, its data entry is very important for the tabulation and analysis process because the unique respondent ID provides you with a "mailing address" in your data file for each completed survey.

If you do not use the pre-assigned questionnaire number, you can assign consecutive numbers to each questionnaire or you can "group" them by stint, or by type of visitor (local, non-local; overnight or same-day, etc.). For example, you could use the 100 series for *locals,* the 400 series for *non-locals* who live in the same province/territory/state as your attraction, and the 600 series for *non-locals* who live outside the province/territory/state in which your attraction is located. If you group respondent IDs in series, make sure each series will accommodate the number of completions you anticipate receiving for each group. In this example, you could have up to 400 completions with *locals,* 300 completions with *non-locals who live in the same province/territory/state* and so on.

Local	Non-local – same province/territory/state	Non-local – other
100 . . . 399	400. . . 699	700. . .

3. Usable questionnaires

Not every questionnaire that is returned is "usable". Some must be discarded from the analysis process because the respondent provided insufficient information for weighting and projection and/or frivolous responses. You should manually review each returned questionnaires to determine how many, if any, have too little information to be kept for analysis. These "unusable returns" should be retained for estimating your response rate (see below) but would not be included in your tabulations.

4. Calculating response rate

The response rate of your Attendee Survey is a measure of how representative your *sample* of attendees is of *all* attendees. Thus, at the distribution phase, you would keep track of how many people refused to accept the questionnaire when offered (from Tally Sheet) and, of those who did accept it, how many actually returned it. The final response rate is the total usable returns ("C" in the table below) you obtained divided by the total asked to complete the survey (C ÷ N in the table below).

Total Asked to Complete	N (number)	Percent
Total Acceptors	A	A ÷ N
Total Returnees	B	B ÷ N
Total Usable Returns	C	C ÷ N

For more information on calculating response rates, see Chapter VIII (*Documenting the Study Process).*

C. Coding survey responses

1. Unique variable addresses in your data file

Responses to each question or "variable" in the questionnaire must be entered into a computer system that will permit you to tabulate and manipulate the results. Generally, a system of numeric codes is developed to assign a unique "address" to each response category for each question. For example, the Respondent ID might be in Field 001 and be four units long. Thus, a questionnaire with Respondent #0239 would be keyed in Field 001 as 0 2 3 9.

Another example: Attendee Survey question about main mode of transport. You might assign codes 1 through 6 for the listed response categories and a "9" for those who leave the question blank:

MAIN TYPE OF TRANSPORTATION
(Type used to travel greatest distance on trip)

	Assigned Code
Auto/truck/motorhome	1
Inter-city bus	2
Train	3
Airplane	4
Boat/ship	5
Other	6
NOT STATED/BLANK	9

You would enter the appropriate code in the field you have assigned to the *Main Mode* variable.

You will require a separate field for each variable you plan to examine. This will include *each* spending category in the *on-site* and *other spending* lists in the Attendee Survey.

2. Numeric fields

For response categories such as **number of nights** and **dollars** (*numeric fields*), you would create fields that can accommodate the maximum number of units you expect to be reported. For example, if you expect the number of nights spent by tourists in your community to be no greater than 99, you could use a two-digit field. In this case, a record with three nights in your community would be entered as "03" and a record with 30 nights would be entered as "30".

You will need to set aside some "codes" for missing information and for "Don't Know" responses. This information should always be included in your data file. In this example, you might use "98" to represent missing information (an item left blank by the respondent) and "99" for "Don't Know".

When setting up numeric fields, be sure to identify the maximum value for the variable in your completed questionnaires so you leave yourself enough room to accommodate the largest value *and* have some codes available to assign to people who mark "don't know" and those who provide "no response" to the variable.

3. Developing code lists for geographical units

For variables such as cities, provinces, states and countries, you will likely need to create a "code list" in which you assign numeric values (codes) to the information provided. As a general rule, it is advised that you rely on census geo-codes at the county (census division) and city levels for the local community and its immediate environs because you will need to be able to sort your respondents into those that live *in* the local area and those who live *outside* this area. For locations outside your province, territory or state, it is usually sufficient to code information only at the province, state or country level.

You can always group smaller geographic units together to build larger ones. Consequently, we recommend that you select the smallest possible unit for geo-coding for locations within your own province or state.

4. Data entry & verification

Once questionnaires have been coded, they must be "entered" or "keyed" into a computer system. Because you will be relying heavily on the dollar values reported by respondents and because it is easy to make errors in keying these numbers, we recommend that you "verify" data entry. Verification is the re-entry of the questionnaire data by a different data entry person and a comparison of the two "files". Any discrepancies between the two files should be resolved by reviewing the actual questionnaire.

5. Keep a copy of the raw data file

Once every usable questionnaire has a unique, electronic "mailing address" and every variable in the questionnaire has a value (code), you have a "raw data file". Keep a copy of your raw data file in a safe place. Make a copy of this "raw" file to use as your "working file". In the "working file", you will clean and edit the data.

D. Creating a "clean" data file

1. Introduction

There are many "editing" procedures required to get your raw data "in shape" to generate the spending estimates necessary to feed a tourism economic impact model. The editing tasks fall into several main categories:

1. Internal consistency
2. Check for reasonable values
3. Replacing missing values and/or distributing "total" values to specific spending categories

To perform the edits, you need a raw data file that provides all responses for each completed questionnaire, including the unique ID, on a record-by-record basis.

All editing and adjustments to spending are to be completed on *unweighted, unprojected* data

(before you have performed the weighting and adjustment tasks).

2. Internal consistency edits

You need to ensure that respondents answered questions in a consistent manner. For example, if they claim to have spent nights in a paid form of lodging (e.g., hotel), they should have entered a dollar amount in the lodging category of the spending question. If they did not do this, you will need to make an adjustment in the data. Similarly, if the *total* number of people in the household travel party is **smaller** than the number who are *under 18* years of age, an adjustment is required If any adjustments are made (apart from keying errors), they should be recorded as part of the technical documentation for the project, including the original value provided by the respondent, the adjusted value and the unique respondent ID. Keeping a record of changes you make will help you and others understand how you arrived at the final estimates. [See Appendices III and IV for Editing Guidelines]

3. Check for reasonable values

Maximum *reasonable* values for each item of expenditure should be set. All records that exceed these "reasonable" values should be manually examined to ensure accuracy of data entry and reporting. If any adjustments are made (apart from keying errors), they should be recorded as part of the technical documentation for the project, including the original amount, the adjusted amount and the unique respondent ID.

The duration of the trip, number of nights in the community and other parts of the province, territory or state and the number of days on which a respondent went to your attraction are included in the questionnaire for two reasons: (1) they provide useful information in their own right and (2) they are tools to help you determine if the values provided by a respondent for on-site and other spending are *reasonable.* When assessing completed responses for reasonable values, you should take responses to these questions into account.

4. Replacing missing values and distributing "total" values to specific spending categories

Spending estimates to be used as inputs for a tourism economic impact model must be divided into categories of expenditure because different types of spending have different *impacts* in an economy.

For example, a dollar spent in a grocery store on food has a different economic impact in a community than does a dollar spent in a restaurant on food. Similarly, dollars spent on lodging, various types of transportation, retail and other categories generate different impacts in an economy.

To prepare spending estimates for use in a tourism economic impact model, you need a set of rules to help you divide spending into each of the categories listed in the questionnaire for respondents who were unable or unwilling to divide their spending into the listed categories when

they completed their questionnaire. The processes for distributing spending to various categories are referred to as allocation or attribution (see definitions in Section 5, below).

Developing and applying rules to handle each type of spending and each circumstance that can occur when people complete a questionnaire is complex. Why? Because the spending patterns of attendees will differ depending on the nature and duration of their trip, how much information they provided in the questionnaire and whether they detailed their spending or provided you with "total only". The patterns and amount of detail provided can vary from respondent to respondent. For more information on how to distribute spending to various categories, see Appendices III, IV.

5. Definitions: reported, allocated and attributed spending

Reported spending is information provided **by the respondent** and taken directly from the questionnaire "as is". It includes the total amount spent in the province/territory/state and the portion (%) of this spending, converted to dollars, that the respondent claims to have spent in the local community.

Allocated spending is the distribution *you* make to various spending categories and/or locations from the "total" dollar amount supplied by the respondent.

Attributed spending is *your* assignment of spending for various spending categories and to locations for respondents who did NOT provide an indication of how much they spent (i.e., categories and "total" are left blank by the respondent).

E. Assigning spending to geographic areas

Because the costs of a particular item such as accommodation could vary greatly depending on the location in which the expense was incurred (e.g., a hotel night in a major city might cost considerably more than a hotel night in small town), respondents are asked to aid in the assignment process by identifying the proportion of their total spending estimate for a particular category that was attributable to the local community. Not all respondents will provide the proportion (%) of total spending that took place in the *local* community. Consequently, you will need some assignment principles so that you can assign spending to different locations in a consistent manner. We recommend the following principles:

- If the respondent provides guidance about the proportion of expenditures in a particular category that was spent in the local area versus the balance of the province/territory/state, use the respondent's distribution for each category, with three exceptions: vehicle operations, vehicle rental and domestic carrier fares (see Appendix IV, Section J, Geographic Distribution Tables).

- If the respondent does not indicate the proportion of expenditures in the local community (or if dollars had to be allocated to specific expenditure items in cases of ascription or distribution of "total" spending), special rules are required (see Appendix IV, Section J, Geographic Distribution Tables). These rules help you to allocate expenditures to the local community and the balance of the province/territory/state.

- All *on-site* expenditures are assigned to the local community.

F. Constructing "attraction accounts" (incremental spending)

Once reported, allocated or attributed spending has been assigned to *geographic areas*, you are ready to isolate the portion of spending that is considered incremental tourism spending. This is the spending that occurred *because* your attraction enticed a tourist to visit the community. The result of these calculations – incremental spending – is the spending you will feed into a tourism economic impact model.

Identifying incremental spending is done on a record-by-record basis, using responses to three questions in the Attendee Survey:

- Similar recreational activities in the community (substitution effects); and
- Importance of your attraction in destination choice.

1. Two attraction account columns

Some incremental spending accrues to the local community and other incremental spending accrues to the rest of the community's province, territory or state. We recommend that you create two "columns" in your Attraction Account so you can estimate the incremental spending at both the community and provincial or state levels. You can add additional "attraction accounts", depending on the number of geographical impact areas you wish to assess. For example, you can add columns to the questionnaire and in the analysis such that you can estimate the tourism economic impact for the *local community*, *county*, and *province/territory/state.*

2. Substitution effects

If a non-local visitor would have engaged in other similar recreational activities in lieu of going to your attraction, spending associated with the attraction is not incremental spending. In other words, it would have occurred irrespective of the attraction. In this case, the attendee's spending "on site" would not be included in the "Attraction Account" (see question from Attendee Survey, below).

SIMILAR RECREATIONAL ACTIVITIES IN COMMUNITY
If you had *not* attended [NAME ATTRACTION] on this trip, would you have gone to some other attraction or event instead? Please refer to the map, if necessary.

	IN [NAME COMMUNITY]	IN [OTHER PARTS OF PROV/TERR/ STATE]
No		
Yes		
Don't Know		

3. Importance of attraction in destination choice

Once substitution effects have been taken into account, you would apply the proportion volunteered by the respondent for the importance of your attraction in the destination choice to remaining expenditures in the "community" and "other parts" of the province/territory/state columns to identify the amounts to be entered in the attraction account.[11] Two "options" are available for this question. You can use the question "as is" or you can insert up to four examples of *types* of other attractions/events in your community that might create an appropriate context for the respondent. You are advised to use *types* rather than exact names of other attractions/events (e.g., art galleries, live theatre performances, casinos, etc.).

THE QUESTION: Write in the number between 0 and 10 below that best describes how important each of the following was in your decision to visit [NAME CITY/TOWN OF ATTRACTION] on this trip, where 0 indicates no influence and 10 is the main single reason for visiting [NAME CITY/TOWN] on this trip. You can assign different numbers to each category listed, so long as the total adds up to 10.

[INSERT NAME OF YOUR ATTRACTION]	_____
Other attractions/events in [NAME CITY/TOWN] [END HERE OR ADD UP TO 4 TYPES OF "OTHER" ATTRACTIONS/EVENTS AVAILABLE IN YOUR COMMUNITY]	_____
Visiting family or friends	_____
Business	_____
Other	_____
Total	10

The proportion of spending that is "incremental to your attraction" is based on the score the respondent volunteers to the "importance question" (see above). Thus, if the respondent claims that your attraction had "0" influence on the decision to visit your community, *no* spending would be included in the attraction account. If he or she offered a score of "3", 30% of the spending in the community and in other parts of the province/territory/state would accrue to the attraction account.

See Appendix IV, Section K, *Identifying and Assigning Incremental Spending to Attraction Account* for a description of how to assign spending to the attraction account at the local and provincial/state levels.

[11] The points-out-of-ten or volunteered proportion out of 100% approach to measuring the instrumentality of an event in the destination choice and subsequently, as a way of determining the amount of spending should accrue to a community *because* the event took place has been widely used by research practitioners including J. Rogers (Research Resolutions & Consulting Ltd.) and T. Tyrrell (University of Rhode Island) for over a decade.

4. If *importance of attraction* question is *don't know* or blank

All questionnaires from non-locals require a value for the "importance of the attraction" in the destination choice. If the respondent does not provide this information or claims not to know the importance, you must calculate and assign a reasonable "surrogate" value. To create a surrogate value, we recommend that you calculate the average score for all those who *offered* a score and apply this average to each "Don't Know" case.

G. Weighting and projecting Attendee Survey data

1. Using tally weights

From the Tally/Counting process, you have estimates of the total number of attendees by place of residence and by stint. Each of your completed **Attendee Surveys** is also linked to a stint because you put a stint ID on each questionnaire before you distributed it (see Tally Process). To estimate the total spending by non-local attendees and the portion of it that will be used in the estimate of economic impact, you would apply the final weights for each stint/place of residence group to those who completed the Attendee Survey.

You must use the proportions you calculated in the tally process for *unique attendees* (taking into account the number of different days tourists went to your attraction on the same trip). Before you do this, you need to "convert" completed attendee survey units from "household parties" to people.

a) An example

Step 1: Convert completed attendee survey units from "household parties" to people on a record-by-record basis. Each completed questionnaire represents the total number of people on the trip.

Step 2: Use the weighted, projected estimates from the tally process for each place of residence group in each stint (see Section IV-B). In the example used in the tally process, Stints 1 and 2 produced the following distribution.

FROM TALLY PROCESS			
Stint		Tallied Attendees	Weighted, Projected Unique* Attendees
S_1	Local	20	**2,749**
S_1	Non-local – Same Province/ Territory/ State	9	**1,238**
S_1	Other Provinces/Territories/ States	1	**137**
S_1	Other Country	1	**135**
S_2	Local	10	**1,621**
S_2	Non-local – Same Province/ Territory/ State	3	**486**
S_2	Other Provinces/Territories/States	2	**324**
S_2	Other Country	2	**318**

*Adjusted for multiple day visits to the attraction on the same trip

b) Attendee person weight

Each completed non-local Attendee Survey (questionnaire) for a particular place of residence and stint will be weighted and projected to the total number of *unique attendees* from the corresponding place of residence that entered your attraction during the particular stint.

Thus, if you estimated that 1,238 non-locals from the same province/territory/state entered during Stint 1, each of the five (5) completed Attendee Questionnaires representing 12 people from this place of residence/stint group will have a weight of 103.19. In other words, each of these records will "stand for" 16.9103.19 unique non-local attendees. This final attendee weight would be coded on the respondent's record in your data file and would be used when you run tabulations for *attendee* characteristics **excluding spending (see note below).**

COMBINING TALLY & ATTENDEE INFORMATION					
Stint		Weighted, Projected Unique Attendees	Completed Attendee Questionnaires	Household Members on Trip	Attendee Person Weight
S_1	Local	2749	N/A	N/A	N/A
S_1	Non-local – Same Province/Territory/State	1238	5	12	103.19
S_1	Other Provinces/ Territories/ States	137	1	3	
S_1	Other Country	135	0	0	90.76*
S_2	Local	1621	N/A	N/A	N/A
S_2	Non-local – Same Province/ Territory/State	486	2	4	121.59
S_2	Other Provinces/ Territories/ States	324	1	2	161.80
S_2	Other Country	318	1	1	318.08

*Cells must be merged because "Other Country" has "0" value

c) Attendee household weight (for spending estimates)

Spending information is collected for ***all members of the household party on the trip***. Consequently, when you are working with spending data, you must create and use an **Attendee Household Weight**. This weight is the Attendee Person Weight divided by the total number of household members on the trip. In our example, one of the 5 non-locals from the same province/territory/state in Stint 1 has a household party size of 2 people. The Attendee Household Weight for this record would be 103.19 ÷ 2, or 51.60. In this case, every dollar spent in the community or in a larger geographic area for this household party would be multiplied by 51.60 to represent this and other *similar* attendee parties.

As shown below, the Attendee Household Weight must be calculated individually for each record, using the Attendee Person Weight and the number of household members reported on the trip (from the completed questionnaire). The **sequence** in which you perform these steps is very important.

Like the Attendee Person Weight, the Attendee Household Weight should be coded on the respondent's record in your data file and must be used when you run tabulations for *all* ***spending*** estimates.

S_1 Non-local – Same Province/Territory/State					
Record	1	2	3	4	5
Attendee Person Weight (A)	103.19	103.19	103.19	103.19	103.19
# on Trip (B)	2	2	1	3	4
Attendee Household Weight (A ÷ B)	51.60	51.60	103.19	34.40	25.80

d) Adjustment for multiple-day attendees

Tourists may come to your attraction on more than one day during their stay in your community. They are asked to report spending for the *entire stay* in the community and *all* their visits to your attraction. Tally information, however, treats each *entry* to your attraction as a separate household party. If no adjustment were made for people who went to your attraction on *more than one day,* estimates of spending would be inflated. To resolve this potentially inflationary situation, special adjustments are required in the tally weighting, taking into account the number of different days tallied attendees went/planned to go to your attraction on the *same* trip. [See Tally Weighting for details.]

VIII. DOCUMENTING THE STUDY PROCESS

A. Introduction

1. What is a *Technical Appendix*?

Once your study is over, you will have results based on the information you collected and analyzed. These results should be accompanied by a document that allows users to understand the robustness of your findings. Such information includes the procedures you used to sample, collect information (interviewing), weight and tabulate your results.

The rationale for a ***Technical Appendix***, as this document is often called, is to provide enough detail about *how the study was done* that if someone else followed your procedures, they would get similar results.

This technical documentation not only provides guidance for interpreting the study findings but also provides a handy reference tool for organizations that may wish to undertake the same type of study "next year" or in subsequent years. The Technical Appendix should provide sufficient information on how the study was conducted that the organization can follow it in the future, thereby, obtaining comparable year-to-year results.

The Technical Appendix will be much easier to compile if you collect and retain calculations (spreadsheets) and survey materials as the study unfolds. In fact, much of what you will need for the Technical Appendix will be "in place" prior to starting the interviewing for the study. Keeping complete records of the steps you take in developing your study and recording the outcomes of activities as you go along will make the preparation of the Technical Appendix much easier!

2. What does a *Technical Appendix* contain?

The essential contents of a Technical Appendix are listed below. Details about each of these topics are provided in the following sections.

- Overview of study objectives and study sponsor(s)
- Who conducted the study
- Study timing and survey dates
- Description of the data capture method(s) used
- Description of the universe under study
- Definition of "qualified respondents"
- Sampling
- Field procedures
- Response rate
- Calculations for weighting/projection
- Data editing, cleaning and adjustment procedures
- Field materials

B. Contents of a Technical Appendix

1. Overview of study objectives and study sponsor(s)

This introductory section describes the major information objectives of the study. Here is an example:

This study was initiated by [NAME OF SPONSOR(S)] in order to obtain inputs to estimate the tourism economic impact of NAME ATTRACTION over the course of a year, to gain a better understanding of who comes to NAME ATTRACTION and to identify improvements that might be made to enhance the visitor experience. Specific objectives included estimating the incidence of tourists and non-tourists, demographic and behavioural characteristics of tourists and non-tourists, tourist spending at the attraction and in the community, ratings of the attraction on a number of attributes and generation of inputs for a tourism economic impact assessment.

2. Who conducted the study

If your organization undertook all aspects of the study, you should say so. If, however, other organizations were called upon to do significant tasks (e.g., sampling, interviewing, data editing and/or tabulations, etc.) they should be identified in the Technical Appendix.

If the project was largely contracted to a third party (e.g., university, survey research firm, etc.), you may want to provide this section of the Guidelines to the supplier and ask them to provide you with a Technical Appendix that covers the topics described here.

3. Study timing and survey dates

The study timing describes the period the findings represent. For example, if you collected information and weighted and projected to volume estimates for a particular season, you would provide the start and end dates of this season and the start and end dates of the survey period. If yours were an annual study, you would indicate the year it covers and the start and end dates of surveying.

4. Description of the data capture method(s) used

This section describes the tools or methods you used to count visitors and collect information from them. Simple descriptions are all you need. For example, if interviewers were used to count entrants, you would say this and indicate what forms or technology they used to keep track of the counts, how many "stints" were assigned to counting, how many "counters" you used and where and when the counting was done. If turnstiles were used you would identify the number and location of turnstiles and how you gathered counts from them (e.g., daily, weekly, etc.).

For collection, you would describe how information was gathered. Some examples:

- *All information was collected via an on-site intercept interview;* or

- *Limited information was collected via an on-site intercept interview and additional information was collected using a self-completion paper questionnaire;* or
- *As above, using a telephone follow-up interview*, etc.

If multiple modes of data collection were used, the basic content of each questionnaire should be described. The actual questionnaires would be appended to the Technical Appendix and do not have to be repeated in their entirety in this section.

5. Description of the universe under study

This section will establish the boundaries of your study findings. The "universe" is the total number of people to which you have weighted and projected questionnaire responses. The information you provide to describe the "universe" would answer the following types of questions:

- Is the universe *all* people who came to the event or attraction or were some types of entrants excluded (e.g., staff, volunteers, media representatives, school groups, bus tours, guests at VIP functions)?
- What mechanisms did you use to exclude certain types of entrants from the tally or attendee survey process? These might include specific questions in the questionnaire or exclusion of some entrances (e.g., staff entrances) from the sample.
- What steps did you take to adjust visitor "counts" to remove certain types of entrants?
- Were local residents and tourists included in your study? If so, how did you define a "tourist"?

If the findings are weighted and projected to tourists or some other subgroup of the total visitor population, you need to provide the definition(s) you used to determine if a person qualified for the subgroup.

6. Definition of "Qualified Respondents"

The criteria used to determine *which* person would be providing information to you (the "qualified respondent") should be documented in this section. If only certain types of people were asked to provide information, you need to describe the qualifications they had to meet. For example, did they have to be at least 18 years of age? Were there other requirements for determining which individual was asked to provide information? For example, did respondents have to be able to report on their own spending and the spending of others travelling with them?

7. Sampling

An overview of the various components of sampling should be provided. What type of sampling plan did you use? Was it a *stratified stint sampling* approach? How were the stints selected? How many were selected? If separate stint samples were developed for *counting* and *interviewing*, materials for each should be included.

This section should also provide information on the *outcome* of your sampling plan. Did all the stints take place as originally intended? Were there cancellations and/or replacements? Were any stints added? How many completions were obtained per stint?

Since you will have compiled much of this information in order to weight and project your interviews or counts to totals, you can either insert your worksheets and full sampling plan for counts and intercepts in the body of the Technical Appendix or summarize stint distribution and outcomes over time (day of week/time of day) and append the more detailed worksheets.

If you plan to provide a summary of the stint sample, including outcomes, you can use the same type of grid provided in these Guidelines for a stratified stint sample with 13 selected stints (see page 45). Using this grid as an example, you would add a column to the table to detail cancellations, replacements and/or additional stints. You would add another column in which you would record the number of completions achieved during each listed stint.

13 Selected High Volume Stints						
					NEW	NEW
Selected Stints	Month	Date	Time	Count	Cancellations/ Substitutions, Other	Number of Completed Interviews
1	June	2	1:30 – 4:30	208		
2	June	14	1:30 – 4:30	16		
3	June	23	10:00 – 1:30	32		
4	July	2	10:00 – 1:30	48		
5	July	12	10:00 – 1:30	64		
6	July	21	10:00 – 1:30	80		
7	July	30	10:00 – 1:30	96		
8	August	8	1:30 – 4:30	112		
9	August	17	1:30 – 4:30	128		
10	August	26	1:30 – 4:30	144		
11	Sept	5	1:30 – 4:30	160		
12	Sept	14	1:30 – 4:30	176		
13	Sept	23	1:30 – 4:30	192		

This section should also cover the procedures used to select respondents for intercept interviews/other interviews. For example, was it every n^{th} party or individual? If so, what interval was used?

8. Field procedures

This section would include brief descriptions of the following elements (as applicable):

- How many interviewers worked on each stage of the project (e.g., counting, tallying, interviewing)?
- How much prior interviewing experience did they have?
- What training was provided to them?
- What supervision procedures were developed for the project (monitoring "count" stints; interview stints, etc.)?
- How many field supervisors worked on the project?
- Were interviewer instruction manuals prepared? If so, a copy should be appended to the Technical Appendix.

9. Response rate

The response rate you achieve in your study is an indication of how representative the surveyed population is of the "universe under study". This number helps you and those using your estimates to understand the robustness and reliability of your findings.

An example of how to calculate the response rate is provided below.

Row		Number	Percent	Formula
1	Total number of entry parties approached during Tally process (A) ["A" = B + C]	2000	100%	
2	Total number of entry parties that completed the Tally interview (sum of completed "rows" on Tally Sheets for all stints) (B)	1200	60%	B ÷ A
3	Total number of entry parties that refused to cooperate with Tally (sum of refusals from the box on top of all Tally sheets [sum of "last number crossed out" on each completed Tally Sheet for all stints]) (C)	800	40%	C ÷ A
4	Total in-scope entry parties for Attendee Survey (Total eligible to receive or asked to complete Attendee Survey. This number is the sum of rows with either a "refusal" or "accepts" mark at Q.8 on the Tally Sheet for all stints) (D) ["D" = E + F]	1,000	50%	D ÷ A
5	Total number of entry parties that refused self-completion/ on-site interview (This number is the sum of rows with a "refusal" mark at Q.8 on the Tally Sheet) (E)	150	8%	E ÷ A
6	Total number of entry parties that accepted self-completion/ completed on-site administered interview (This number is the sum of rows with an "accepts" mark at Q.8 on the Tally Sheet) (F)	850	43%	F ÷ A
7	Returned self-completion survey/completed on-site administered interview (G)	430	22%	G ÷ A
8	Unusable questionnaires (H) (Number of questionnaires that were not processed because they were incomplete, were returned too late, or for other reasons]	15	1%	H ÷ A
9	Usable questionnaires for processing (I) [I = G - H)	415	21%	I ÷ A
10	Completed Questionnaires Among All Entry Parties	22%	Row 7	
11	**Usable Completed Questionnaires Among All Entry Parties**	**21%**	Row 9	
12	**Usable Completed Questionnaires Among All In-Scope Parties**	**42%**		I ÷ D

Notes for example

- Rows 1 – 3: You would sum **refusals** (the row of numbers at the top of the tally sheet that are "crossed out" as parties refuse the tally process) and sum **completed rows** from all tally sheets for all stints. The sum of these two (Rows 2 and 3) represents the number of "encounters" interviewers had with attendee parties. You would record this number in Row 1.

- Rows 4 – 6: You would use information recorded on the tally sheets for each entry party interviewed (in this example, the information is based on the response to Question 8 of the tally questionnaire).

- Rows 7 – 9: These are the number of completed Attendee Surveys that were returned.

10. Calculations for weighting/projection

A brief description of the steps you took to weight and project your survey findings to the universe under study should be presented in this section. It should also include the calculations you performed, as described in Chapter IV, and Chapter VII, Section G of these Guidelines.

11. Data editing, cleaning and adjustment procedures

A brief description of the steps you took to clean and edit questionnaires and to create the attraction account (if applicable), as described in Chapter VII, Sections D, E, F of these Guidelines should be presented in this section.

12. Field materials

As **appendices** to your Technical Appendix, you should include copies of *all* survey materials:

- Written interviewer instructions
- Written supervisor instructions
- Tally Sheet /Tally questions
- Self-completion/ other questionnaires

IX. GLOSSARY

Allocated spending Allocated spending is the distribution *you* make to various spending categories and/or locations from the "total" dollar amount supplied by the respondent.

Attendee Survey Questionnaire The Attendee Survey Questionnaire is a questionnaire that covers topics such as purpose of visit, ratings of the attraction for a variety of characteristics and spending details. In the study design provided in these guidelines, the Attendee Survey Questionnaire is self-administered. Recruitment for Attendee Survey respondents is included as part of the Tally Interview (a short personally administered interview to obtain basic information about which attendees are locals, tourists, etc.).

Attraction account The attraction account includes the portion of tourist spending that is considered incremental. This is the spending that occurred *because* an attraction took place. It is the spending that would be fed into a tourism economic impact model.

Attributed spending Attributed spending is *your* assignment of spending for various spending categories and to locations for respondents who did NOT provide an indication of how much was spent.

Concentrated entry attraction An attraction in which most or all of the attendees arrive within a very short time span. Examples might include a concert or other performance.

Counts All attendees entering during tally stint. You will project the people you tallied during the stint to the total *count* during the same stint.

Excluded categories of attendees Some people who entered your attraction and were counted during a stint may be *excluded attendees.* Excluded groups might include paid or unpaid attraction staff including volunteers, representatives of the media, etc. If you are conducting a tourism economic impact assessment, these individuals must be removed from the tallies.

Final Ticket Adjustment Weight Adjustment to match the total number of ticketed attendees who came to the attraction to the number represented by your sample.

Gated permanent attraction A permanent attraction that occupies a confined area with "gates" or other "controlled" points of entry/exit.

Gross domestic product (GDP) The value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership, which is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

Household travel party/household party All people travelling together and/or who came to the attraction together and who live in the same permanent residence.

Incidence Incidence as used in these guidelines generally refers to the proportion a smaller sub-group represents of all attendees at your attraction (e.g., the *incidence of tourists is estimated to be 15%* means that you expect that 15% of all attendees at your attraction will be *tourists*).

Incremental spending Incremental spending is money that is spent at or because of the attraction *that would not otherwise* have been spent in the community. If the same money that is spent at an attraction would have been spent in the community on other activities, goods or services, the attraction is not deemed to be responsible for the spending. In other words, some of the spending that takes place at an attraction is *not* incremental – it would have happened anyway.

Interviewer Stint A unique time period at a specific entry point to your attraction to which one interviewer is assigned to collect information (tally and/or count attendees at your attraction).

On-site tally A systematic way of intercepting a random sample of attraction attendees as they enter the site and asking them a few questions to determine the proportion of attendees from different places of residence (e.g., *locals* and *non-locals*).

Projection procedures *Projection procedures* refer to how you will expand the subset (sample) of attendees included in the research process to *all* attendees and/or *all* tourists who came to your attraction.

Record A "record" is all the information collected from a single respondent. Thus, it would be a single "row" on the Tally Sheet or a completed Attendee Survey (questionnaire).

Reported spending Reported spending is information provided by the respondent and taken directly from the questionnaire "as is". It includes the total amount spent in the province/state and the portion (%) of this spending, converted to dollars, that the respondent claims to have spent in the local community.

Sampling procedures *Sampling procedures* refer to the mechanisms you will use to identify the subset of attendees and/or tourists that will be included in the research process.

Segments A "segment" is a group of people who share one or more common characteristics. Examples of tourist "segments" include those who are out-of-town visitors but live in the same province/territory or state as your attraction ("in-province/territory tourist segment") versus those who live outside your province, territory or state ("out-of-province/territory tourist segment").

Stint Unique time period designated for the purpose of measurement (data collection) or observation at a specific entry point or location at an attraction. The stint forms the basis for *sampling* attendees who come to an attraction.

Stint Sample A randomly selected set of stints during which you will count and/or tally attendees at your attraction.

Stint Weight Adjustment to sampled stints so that they represent all people who entered your attraction.

Substitution effects This term refers to spending on a particular good or service that is a "substitute" for spending that would have been spent a similar good or service. For example, while visiting your community, Dave and Diane decide to go to your attraction instead of going to a movie at the local theatre. Suppose that the ticket price for your attraction and the movie are the same. In this case, the purchase of tickets for your attraction would produce *no* incremental spending. Why? Because Dave and Diane would have spent the *same amount* of money in your community on a recreational activity (either your attraction or the movie) – whether your attraction were available or not. In essence, your attraction and the movie are substitutes for one another. (Note that we are assuming that any difference in the indirect or induced impacts are likely small and can be safely ignored.)

Tally Interview Short interview to obtain basic information about which attendees are locals, tourists, etc. In the study design provided in these guidelines, the Tally Interview is used to recruit appropriate respondents for the "Attendee Survey Questionnaire". This longer questionnaire covers topics such as purpose of visit, ratings of the attraction for a variety of characteristics and spending details.

Tourism economic impact Tourism economic impact is the *change* in sales, income and jobs in businesses or agencies that receive tourists' spending directly, indirectly or as a result of household expenditures, from the income earned directly or indirectly because tourists came to the community and spent money there.

Tourism economic impact model An econometric tool that utilizes the structure of the region's economy, generally based on national statistical organizations' data (such as input/output tables), and provides estimates of the impact tourists' spending has on overall economic activity, jobs and taxes.

Tourist The manner in which the World Tourism Organization's guidelines for the *tourism* component of *travel* is operationalized for measurement purposes varies from country to country. Attraction managers should check with the appropriate authorities to determine the operational definition in use in their particular jurisdiction. The operational approach adopted by Canada for identifying tourists is provided here.

An overnight domestic tourist is one who claims to have taken an *out-of-town* trip of at least one night away from home for any purpose apart from commuting to work or school, moving to a new residence, routine trips (shopping, medical, religious observance, pick-ups/deliveries, service/sales calls or other routine work-related trips). The trip must be completed within 365 days.*

A same-day domestic tourist is defined in a manner similar to the overnight tourist but the out-of-town trip must take the traveller at least 40 kilometres (25 miles) one-way from home and be completed within less than 24 hours (different jurisdictions use different distance criteria).

A same-day or overnight international tourist is one who crosses an international boundary (e.g., from Canada to the USA) on a trip for any purpose, excluding commuting to work or school, on military or diplomatic or as a member of a crew.* The trip must be completed within 365 days. *Some other minor exclusions apply.

Ungated / Partially Gated Permanent Attraction

A permanent attraction that occupies a space in which at least some points of entry are not controlled.

Unique tourists

Unique tourists" at an attraction are members of a single household travel party irrespective of how many different days they visit the attraction *on the same trip.* Special adjustments are required for multiple visits by tourists to an attraction during the same trip to avoid overestimating tourism spending associated with the trip.

Weighting/ Projection Plan

A **weighting and projection plan** permits you to generalize from your *sample* to *all* attendees at your attraction. It is based on a sequence of arithmetical steps, using information you collected and compiled from **attendee counts** and **attendee tallies** conducted over the duration of your operating year. The **weight** is the calculated outcome of the arithmetical steps you have taken. It is a "factor" that is applied to each record such that, when tabulated, the individual record represents its correct share of the total population under study.

APPENDIX I: SUPPORTERS & PANEL OF EXPERT MEMBERS

A. Supporters

The Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative and Tourism British Columbia provided financial support for modifying the original guidelines for events and festivals to reflect the measurement requirements of permanent attractions.

Supporters of the **original guidelines** and the panel of experts in Canada and the United States who developed them are listed below.

Canada	Tourism British Columbia
	Canadian Tourism Commission
	Ontario Ministry of Tourism
	Nova Scotia Department of Tourism, Culture and Heritage
	Alberta Tourism, Parks, Recreation and Culture
	Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative
	Tourism Prince Edward Island
	Government of Yukon – Department of Tourism and Culture
	Government of the Northwest Territories – Department of Resources, Wildlife, & Economic Development
USA	Texas A&M University

B. Panel of Experts

Canada	Bonnie Mactavish, Royal Agricultural Fair*
	Judy Rogers, Research Resolutions & Consulting Ltd.
USA	Texas A&M University
	➢ Dr. John Crompton
	➢ Dr. James F. McNamara
	➢ Dr. Joseph O'Leary
	➢ Dr. James Petrick
	➢ Dr. Douglass Shaw

*Canadian Association of Fairs and Exhibitions (C.A.F.E.) Representative

APPENDIX II: MARGIN OF ERROR TABLE

Table of Margin of Error at 95% Level of Confidence

	PROPORTION OF RESPONDENTS PROVIDING A SPECIFIC RESPONSE TO A SURVEY QUESTION									
	5.0% or 95.0%	10.0% or 90.0%	15.0% or 85.0%	20.0% or 80.0%	25.0% or 75.0%	30.0% or 70.0%	35.0% or 65.0%	40.0% or 60.0%	45.0% or 55.0%	50.0%
SAMPLE SIZE										
20	9.6%	13.1%	15.6%	17.5%	19.0%	20.1%	20.9%	21.5%	21.8%	21.9%
40	6.8%	9.3%	11.1%	12.4%	13.4%	14.2%	14.8%	15.2%	15.4%	15.5%
60	5.5%	7.6%	9.0%	10.1%	11.0%	11.6%	12.1%	12.4%	12.6%	12.7%
80	4.8%	6.6%	7.8%	8.8%	9.5%	10.0%	10.5%	10.7%	10.9%	11.0%
100	4.3%	5.9%	7.0%	7.8%	8.5%	9.0%	9.3%	9.6%	9.8%	9.8%
120	3.9%	5.4%	6.4%	7.2%	7.7%	8.2%	8.5%	8.8%	8.9%	8.9%
140	3.6%	5.0%	5.9%	6.6%	7.2%	7.6%	7.9%	8.1%	8.2%	8.3%
160	3.4%	4.6%	5.5%	6.2%	6.7%	7.1%	7.4%	7.6%	7.7%	7.7%
180	3.2%	4.4%	5.2%	5.8%	6.3%	6.7%	7.0%	7.2%	7.3%	7.3%
200	3.0%	4.2%	4.9%	5.5%	6.0%	6.4%	6.6%	6.8%	6.9%	6.9%
220	2.9%	4.0%	4.7%	5.3%	5.7%	6.1%	6.3%	6.5%	6.6%	6.6%
240	2.8%	3.8%	4.5%	5.1%	5.5%	5.8%	6.0%	6.2%	6.3%	6.3%
260	2.6%	3.6%	4.3%	4.9%	5.3%	5.6%	5.8%	6.0%	6.0%	6.1%
280	2.6%	3.5%	4.2%	4.7%	5.1%	5.4%	5.6%	5.7%	5.8%	5.9%
300	2.5%	3.4%	4.0%	4.5%	4.9%	5.2%	5.4%	5.5%	5.6%	5.7%
320	2.4%	3.3%	3.9%	4.4%	4.7%	5.0%	5.2%	5.4%	5.5%	5.5%
340	2.3%	3.2%	3.8%	4.3%	4.6%	4.9%	5.1%	5.2%	5.3%	5.3%
360	2.3%	3.1%	3.7%	4.1%	4.5%	4.7%	4.9%	5.1%	5.1%	5.2%
380	2.2%	3.0%	3.6%	4.0%	4.4%	4.6%	4.8%	4.9%	5.0%	5.0%
400	2.1%	2.9%	3.5%	3.9%	4.2%	4.5%	4.7%	4.8%	4.9%	4.9%
420	2.1%	2.9%	3.4%	3.8%	4.1%	4.4%	4.6%	4.7%	4.8%	4.8%
440	2.0%	2.8%	3.3%	3.7%	4.0%	4.3%	4.5%	4.6%	4.6%	4.7%
460	2.0%	2.7%	3.3%	3.7%	4.0%	4.2%	4.4%	4.5%	4.5%	4.6%
480	1.9%	2.7%	3.2%	3.6%	3.9%	4.1%	4.3%	4.4%	4.5%	4.5%
500	1.9%	2.6%	3.1%	3.5%	3.8%	4.0%	4.2%	4.3%	4.4%	4.4%
520	1.9%	2.6%	3.1%	3.4%	3.7%	3.9%	4.1%	4.2%	4.3%	4.3%
540	1.8%	2.5%	3.0%	3.4%	3.7%	3.9%	4.0%	4.1%	4.2%	4.2%
560	1.8%	2.5%	3.0%	3.3%	3.6%	3.8%	4.0%	4.1%	4.1%	4.1%
580	1.8%	2.4%	2.9%	3.3%	3.5%	3.7%	3.9%	4.0%	4.0%	4.1%
600	1.7%	2.4%	2.9%	3.2%	3.5%	3.7%	3.8%	3.9%	4.0%	4.0%
620	1.7%	2.4%	2.8%	3.1%	3.4%	3.6%	3.8%	3.9%	3.9%	3.9%
640	1.7%	2.3%	2.8%	3.1%	3.4%	3.6%	3.7%	3.8%	3.9%	3.9%
660	1.7%	2.3%	2.7%	3.1%	3.3%	3.5%	3.6%	3.7%	3.8%	3.8%
680	1.6%	2.3%	2.7%	3.0%	3.3%	3.4%	3.6%	3.7%	3.7%	3.8%
700	1.6%	2.2%	2.6%	3.0%	3.2%	3.4%	3.5%	3.6%	3.7%	3.7%
720	1.6%	2.2%	2.6%	2.9%	3.2%	3.3%	3.5%	3.6%	3.6%	3.7%
740	1.6%	2.2%	2.6%	2.9%	3.1%	3.3%	3.4%	3.5%	3.6%	3.6%
760	1.5%	2.1%	2.5%	2.8%	3.1%	3.3%	3.4%	3.5%	3.5%	3.6%
780	1.5%	2.1%	2.5%	2.8%	3.0%	3.2%	3.3%	3.4%	3.5%	3.5%
800	1.5%	2.1%	2.5%	2.8%	3.0%	3.2%	3.3%	3.4%	3.4%	3.5%
820	1.5%	2.1%	2.4%	2.7%	3.0%	3.1%	3.3%	3.4%	3.4%	3.4%
840	1.5%	2.0%	2.4%	2.7%	2.9%	3.1%	3.2%	3.3%	3.4%	3.4%
860	1.5%	2.0%	2.4%	2.7%	2.9%	3.1%	3.2%	3.3%	3.3%	3.3%
880	1.4%	2.0%	2.4%	2.6%	2.9%	3.0%	3.2%	3.2%	3.3%	3.3%
900	1.4%	2.0%	2.3%	2.6%	2.8%	3.0%	3.1%	3.2%	3.3%	3.3%
920	1.4%	1.9%	2.3%	2.6%	2.8%	3.0%	3.1%	3.2%	3.2%	3.2%
940	1.4%	1.9%	2.3%	2.6%	2.8%	2.9%	3.0%	3.1%	3.2%	3.2%
960	1.4%	1.9%	2.3%	2.5%	2.7%	2.9%	3.0%	3.1%	3.1%	3.2%
980	1.4%	1.9%	2.2%	2.5%	2.7%	2.9%	3.0%	3.1%	3.1%	3.1%
1000	1.4%	1.9%	2.2%	2.5%	2.7%	2.8%	3.0%	3.0%	3.1%	3.1%

Here is an example. Assume 200 tourists completed the Attendee Survey. Your "sample size" is 200. In response to the question about their "Similar recreational activities in Community" 20% of them report that they would have gone to a different attraction on this trip ("Yes"). In the table provided here, you would read down the first column (SAMPLE SIZE) until you reach "200" and then read across this row until you find the proportion (or nearest proportion) that corresponds to the estimate in your study. In this case, you would be looking for a column labelled "20% ". Read down this column until it intersects with your sample size. In this case, the number you would find is 5.5% (see example below).

This means that there is a 95% probability (19 times out of 20) that the percentage of your sample that said "yes" is within 5.5% of the true percentage of all attendees who visited your community. You would report this in a manner such as the following: *About twenty percent of tourists at NAME ATTRACTION (±6%) would have gone to a different attraction in the community if they had not come to NAME ATTRACTION on their trip.*

Note: even though the table provides estimates with a decimal point, we have rounded the 5.5% up to 6% and advise that you always round the ± percentage up to the nearest whole number in order to minimize impressions of false precision.

PROPORTION OF RESPONDENTS PROVIDING A SPECIFIC RESPONSE TO A SURVEY QUESTION

SAMPLE SIZE	5.0% or 95.0%	10.0% or 90.0%	15.0% or 85.0%	20.0% or 80.0%	25.0% or 75.0%	30.0% or 70.0%	35.0% or 65.0%	40.0% or 60.0%	45.0% or 55.0%	50.0%
20	9.6%	13.1%	15.6%	17.5%	19.0%	20.1%	20.9%	21.5%	21.8%	21.9%
40	6.8%	9.3%	11.1%	12.4%	13.4%	14.2%	14.8%	15.2%	15.4%	15.5%
60	5.5%	7.6%	9.0%	10.1%	11.0%	11.6%	12.1%	12.4%	12.6%	12.7%
80	4.8%	6.6%	7.8%	8.8%	9.5%	10.0%	10.5%	10.7%	10.9%	11.0%
100	4.3%	5.9%	7.0%	7.8%	8.5%	9.0%	9.3%	9.6%	9.8%	9.8%
120	3.9%	5.4%	6.4%	7.2%	7.7%	8.2%	8.5%	8.8%	8.9%	8.9%
140	3.6%	5.0%	5.9%	6.6%	7.2%	7.6%	7.9%	8.1%	8.2%	8.3%
160	3.4%	4.6%	5.5%	6.2%	6.7%	7.1%	7.4%	7.6%	7.7%	7.7%
180	3.2%	4.4%	5.2%	5.8%	6.3%	6.7%	7.0%	7.2%	7.3%	7.3%
200	3.0%	4.2%	4.9%	5.5%	6.0%	6.4%	6.6%	6.8%	6.9%	6.9%
220	2.9%	4.0%	4.7%	5.3%	5.7%	6.1%	6.3%	6.5%	6.6%	6.6%
240	2.8%	3.8%	4.5%	5.1%	5.5%	5.8%	6.0%	6.2%	6.3%	6.3%
260	2.6%	3.6%	4.3%	4.9%	5.3%	5.6%	5.8%	6.0%	6.0%	6.1%
280	2.6%	3.5%	4.2%	4.7%	5.1%	5.4%	5.6%	5.7%	5.8%	5.9%
300	2.5%	3.4%	4.0%	4.5%	4.9%	5.2%	5.4%	5.5%	5.6%	5.7%
320	2.4%	3.3%	3.9%	4.4%	4.7%	5.0%	5.2%	5.4%	5.5%	5.5%
340	2.3%	3.2%	3.8%	4.3%	4.6%	4.9%	5.1%	5.2%	5.3%	5.3%
360	2.3%	3.1%	3.7%	4.1%	4.5%	4.7%	4.9%	5.1%	5.1%	5.2%
380	2.2%	3.0%	3.6%	4.0%	4.4%	4.6%	4.8%	4.9%	5.0%	5.0%
400	2.1%	2.9%	3.5%	3.9%	4.2%	4.5%	4.7%	4.8%	4.9%	4.9%

APPENDIX III: ATTENDEE SURVEY: EDITING & SPENDING ALLOCATION

C. Special Edit Rules for Lodging

Total nights on the trip cannot be less than sum of total nights in each sub-location. If sum of nights in all lodging types/locations is greater than the total nights on the *trip,* adjust the nights on trip to equal the sum of nights reported in the lodging questions.

If lodging spending is provided in the *Spending* question AND . . .

. . . *only* unpaid lodging is used (e.g., private home or cottage), move lodging spending to "other" spending;

. . . Not Stated (NS) or Don't Know (DK) to type of lodging, re-code type to "paid -- type unknown" lodging and retain spending reported in the *Spending* question;

. . . same-day trip (e.g., no nights), move lodging spending to "other" spending.

APPENDIX IV ASSIGNING SPENDING TO CATEGORIES

These guidelines assume that on-site spending and "other spending" is calculated separately, as per the sample Attendee Survey Non-Local questionnaire included in these materials. The principles listed below would be applied *separately* for On-Site and Other Spending. (See **Guidelines for Calculating Average Spending for Allocation/ Ascription** for more details.)

A. Only "Total" provided

Distribution of "total only" spending will depend on whether the respondent did or did not identify whether money was spent on various items (checked at least one of the "spent any" boxes).

1. Checked some "Spent Any" boxes

Calculate average spending per category for records that supplied the full array of detailed spending. Use these averages to generate ratios for the "mix" of items on which the respondent claims to have spent money but did not provide an amount. The ratios will guide how you distribute the respondent's "total spending" to each category on which the respondent claims to have spent money but did not provide an amount. To the extent that the data can support it, different sets of ratios would be calculated for major origin groups and separately for same-day and overnight travellers.

We recommend that averages be based on cells (segments) with at least fifty (50) records of respondents who *do* provide a complete spending profile.

2. Checked no "Spent Any" boxes

Calculate average spending per category for records that supplied the full array of detailed spending. Use these averages to generate ratios to assign the respondent's "total spending" to *each* category. To the extent that the data can support it, different sets of ratios would be calculated for major origin groups and separately for same-day and overnight travellers.

B. No Total Provided and Some Items Marked with "Don't Know" Amount

If respondent did not know (DK) how much was spent on a specific item, the average amount for an analogous visitor (same origin, same transport mode) on a per person per night basis would used to attribute dollars to the DK categories.

In the case of carrier fares, the average spending for commercial *domestic* air carrier and *other* air carrier would be calculated and assigned as per the appropriate origin group.

C. Total Provided and Some Items Marked with "Don't Know" Amount

Subtract itemized values from total. Assign the remainder to categories marked as "don't know", using ratios from the calculated average spending per category for records that supplied the full array of detailed spending*. These ratios would only include the "mix" of items marked "don't know" by the respondent.

*To the extent that the data can support it, different sets of ratios would be calculated for major origin groups and separately for same-day and overnight travellers.

D. No Spending Information Provided

Calculate average spending per category for records that supplied the full array of detailed spending.* Assign these averages using the appropriate origin/length of stay and unit (per person, per person per night, per household party) to each category.

As an alternative to calculating and assigning average spending to non-responders, you can exclude records that provide no spending information as *unusable* (see above). This option should be selected *only* if you have met your target number of completions per cell (e.g., 200 tourists).

*To the extent that the data can support it, different sets of ratios would be calculated for major origin groups and separately for same-day and overnight travellers.

E. Guidelines for Calculating Average Spending for Allocation/ Ascription

Item	Unit	Type Of Averages To Be Used For Assignment/Allocation of Spending
ON-SITE SPENDING		Assumes at least 50 records in each cell for calculating averages.
Admission	Per Person	Total Attendees
Other on-site tickets/ admissions (special events, concerts, etc. held at the attraction but not included in the general admission price)	Per Person	Total Attendees
Food & beverages at restaurants, fast food outlets, concessions	Per Person	Total Attendees
At lounges, bars, clubs at attraction	Per Person	Total Attendees
Souvenirs/gift shop purchases	Per Person	Total Attendees
Other shopping/retail	Per Person	Total Attendees
Parking	Per Household Party	Total Attendees

Item	Unit	Type Of Averages To Be Used For Assignment/Allocation of Spending
OTHER SPENDING		Assumes at least 50 records in each cell for calculating averages. If less than 50 records per cell, collapse origin cells.
Gasoline/repairs for vehicle	Per Household Party Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Vehicle rental	Per Household Party Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Parking	Per Household Party Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Local taxis, local buses, subways	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Groceries/beverages (at grocery/liquor stores)	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Food & beverages at restaurants	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
At lounges, bars, clubs	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Clothing	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Other shopping	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Lodging	Per Person Night	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Any Other Expenses	Per Person Night*	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Domestic Carrier *Within* Province/Territory/State		
Bus/Train	Per Person	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Air Carrier/Boat/Ship	Per Person	Total Non-Local
Domestic Carrier *To* Province/Territory/State		
Bus/Train	Per Person	Total Non-Local
Air Carrier/Boat/Ship	Per Person	Total Non-Local
*For local residents and non-locals with no nights in the province/territory/state, use “per person” in lieu of “per person per night”.		

F. Attendee Survey: Geographic Distribution Tables

Rules for assigning spending to geographic locations if % not reported by respondent & special rules for ALL gasoline/repairs, vehicle rental, domestic carrier fares	
Category	
Local & Non-Local Attendees Error! Bookmark not defined.	
All On-Site spending	Assign to "Local Community"
Non-Local	
Gasoline/repairs for vehicle	***These Rules Override Respondents' Assignments:*** **Same-Day Trip:** If resident of province/territory/state: Assign To Place of Residence If other non-local: Divide evenly between "local community" and "other part of province/territory/state **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Vehicle rental	***These Rules Override Respondents' Assignments:*** **Same-Day Trip:** If resident of province/territory/state: Assign To Place of Residence If other non-local: Divide evenly between "local community" and "other part of province/territory/state **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Parking	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Local taxis, local buses, subways	**Same-Day Trip:** Divide evenly between "Local Community" and Place of Residence (e.g., Other Part of Province/territory/state OR Other Province/territory/state) **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Groceries (at grocery stores)	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Food & beverages at restaurants	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
At lounges, bars, clubs	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Clothing	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Lodging	**Overnight Trip:** Divide according to the ratio of ***paid*** accommodation nights spent in Local Community/ Other Part of Province/territory/state
Other shopping	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Any Other Expenses	**Same-Day Trip:** Assign to "Local Community" **Overnight Trip:** Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory/state
Domestic Carrier Fares (Plane, Train, Bus, Ship)	***These are special rules for domestic carrier fares.*** If resident of province/territory/state: Assign To Place of Residence If resident of provinces/states other than that of the local community: No domestic Carrier Fares assigned If resident Of Other Country: Assign To Main Destination NOTE: Foreign carrier fares are not assigned to any domestic location (they accrue to the place of residence of the respondent.)

G. Identifying and Assigning Incremental Spending to Attraction Account

	% of Spending to Be Assigned to . . . Account	
	Attraction's Community Account	**Attraction's "Other Part" of Provincial/ Territorial/State Account**
Substitution Effect		
"No" or "Don't Know" to other similar recreational activity	100% of On-Site Spending; Proportion Of Community Expenditures On Basis Of "Importance" Question for Other Spending	0% of On-Site Spending; Proportion Of Other Province/territory/state Expenditures On Basis Of "Importance" Question for Other Spending
"Yes" to other similar recreational activity		
. . . in community	0% of All Spending	0% of All Spending
. . . in other part of province/territory/state	100% of On-Site Spending; Proportion Of Community Expenditures On Basis Of "Importance" Question for Other Spending	-100% of On-Site Spending; - (minus) Proportion Of Other Province/territory/state Expenditures On Basis Of "Importance" Question for Other Spending
All Other Attendees		
Proportions from the "Importance" question are assigned in units of ten percent, from "0" influence (0%) to "10" influence (100%).	Proportion Of Community Expenditures On Basis Of "Importance" Question	Proportion Of Other Province/territory/state Expenditures On Basis Of "Importance" Question

APPENDIX V: ANNOTATED LITERATURE REVIEW FOR EVENTS & FESTIVALS

A. Gated Events

Brown, M.D.; Var, T.; Lee, S. (2002) Messina Hof Wine and Jazz Festival: an Economic impact analysis. *Tourism Economics* 8 (3) pp 273-279.

This article studies the economic impact on a community during a wine and jazz festival. The study uses IMPLAN PRO software to analyze the data gathered at the festival. Brown et al. focus on two questions: "Is the event economically feasible?" and "What economic impacts will the event or festival have on the surrounding community?" Brown et al. defined the regional economy structure as including production, income distribution, trade, consumption of goods/services, saving and investments. Brown et al. did not collect original data, but rather used secondary data. It is also noted that Brown et al. used "ball park" figures (276). The Jazz Festival was expected to produce $892,981 in sales output in the Brazos County area. The results of the input-output analysis were that the sales output was $581,298. Indirect sales output was $139,323 with induced sales output of $172,360.

Crompton, J.L.; Lee, S.; Shuster, T.J. (2001) A Guide for Undertaking Economic Impact Studies: The Springfest Example. *Journal of Travel Research* Vol. 40 pp. 79-87.

This article focuses on a generalized model for studying the economic impacts of a festival on a community. The article discusses the why and why not to include local residents, "time-switchers" and "casuals", use of income rather than sales output, and proper or accurate interpretation of employment multipliers. Crompton et al. discusses the rationale and provides a model for communities to invest in the production of festivals as an economic benefit to the community. Crompton et al. suggest that economic impact studies are not bottom line, but rather are "best guesses" of the impact of money being spent at a festival. The authors give examples of how the numbers from an impact study can be manipulated in order to bring about a certain outcome. The authors briefly give reasons on why not to include local residents, "time switchers" and "casuals". A brief discussion takes place in regards to the use of income rather than sales measures as well as the need for interpretation of employment measures needs to be done carefully.

The authors give the instrument and calculations in collecting data and why each question was asked. The authors discuss in their conclusion the importance of estimating the total attendance. They emphasize the importance of identifying local residents, "time-switchers" and "casuals" and the importance of interpreting the output numbers especially in income multipliers and job creation.

Tyrrell, T.J. & Johnston, R.J. (2001) A Framework for Assessing Direct Economic Impacts of Tourist Events: Distinguishing Origins, Destinations, and Causes of Expenditures. *Journal of Travel Research* Vol. 40 pp. 97-100.

The authors of this article discuss a standardized method in which to measure tourism events. This is not a tool to measure tourism, but rather a single or series of short-term events. The authors argue that a framework must be created to account for "1) the source of expenditure, 2) the geographic starting point 3) the destination or end point of the expenditure, and 4) the reason for the expenditure" (p.94). The purpose for the framework is for practitioners not to make mistakes that are common in assessing net economic impacts from a tourist event. The authors include anyone and everyone that attend the tourist event from the local residents, media, performers,

sponsors, organizers and the vendors of the event in their economic impact analysis. The authors point out that it is important for practitioners to be able to accurately estimate the tourist expenditure at an event and distinguish between and tourist event, site or just tourism.

Yoon, Y.; Chen, J.S.; Gursoy, D.; (1999). An investigation of the relationship between tourism impacts and host communities' characteristics. *Anatolia; an international journal of tourism and hospitality research.* 10 (1). pp. 29-44

The authors of this article mailed a survey to an urban area in Virginia in order to identify residents' perceptions of tourism development. Two questions were developed to address this issue:

1) "How do host community residents perceive and categorize the impacts of tourism development?"

2) "Are there any relationships between the host communities characteristics and perception and categorization of tourism impacts?" (p. 29)

Economic benefits, social costs, cultural enrichment, environmental deterioration, and physical enhancement were identified as impact factors through factor analysis. These were the main factors identified that affect residents' attitudes toward tourism development. The methodology used was a self-instructed questionnaire collected by a stratified sampling method (the questionnaire is given in table format in this article). It was concluded in the article there is a relationship between community characteristics and perceived tourism impacts. It is also noted that the results of this survey were different from two other studies done in rural communities and that stakeholders in the urban area were more sensitive to the impacts than rural stakeholders. The authors suggest that a possible reason for this is due to a larger dependence in the rural community on tourism. Some other characteristics identified as having a larger impact on perceptions of tourism development were "community attachment, length of residency and birth place" (p. 42).

Gratton, C.; Taylor, P.; (1986) Arts festivals. *Leisure management.* 6 (11) pp. 20-22

This article discusses research by Vaughn (1980) (also reviewed in this bibliography). The authors discuss the economic viability of art festivals in Edinburgh and take the reader through Vaughn's methodology of how the analysis was conducted and to whom. The authors specifically address whether or not the festival was justified in having government subsidies. It was concluded that indeed the government subsidies were justified and that the economic benefit from the festival was extremely fruitful to the local communities.

The author also concluded that for small towns or communities with small festivals, the financial return in sales, income, and employment had as great if not a greater impact on the community than would have been found in a larger city.

Vaughn, D.R. (1980) Does a festival pay? *Economic policy for the arts.* pp. 319-331.

This is the study discussed by Gratton and Taylor (1986) [see above]. Vaughn conducted interviews with 660 groups of visitors to the events of which 360 gave details regarding the groups' expenditures. Vaughn gives details into the formulas for deriving multipliers.

He argues that success of a festival must be defined by the stakeholders and that economic gain is not necessarily the primary arbitrator for success, but rather there are social implications as well. Vaughn states that managers not only need to count how many visitors attend a festival, but what types as well; thus providing better or different accommodations for guests and visitors to the festivals. This analysis gives guidance on how tourism should be developed. Vaughn concluded that "festivals [are]…major economic assets which produce a measurable financial return" (p. 329).

Auld, T.; McArthur, S. (2003). Does event-driven tourism provide economic benefits? A case study from the Manawatu region of New Zealand. *Tourism economics; the business and finance of tourism and recreation.* 9 (2) pp. 191- 201.

This article discusses whether or not events in the Manawatu region of New Zealand are economically beneficial. The authors used incremental analysis and estimated the "changes to costs and revenues arising from an event compared with the no-event situation" (pp193). The authors discuss opportunity costs and define two economic costs:

1) *explicit costs,* which involve monetary exchange when they are incurred (these are the ordinary payments identified by most people as costs, such as wages or payments for printed advertising) and

2) implicit or 'invisible' costs, which involve no monetary exchange when they are incurred (these include items such as foregone incomes or depreciation on assets).

The authors used a self-administered 'tick the box' survey as means for data collection. A problem arising from this is double-counting of expenditures as several events were being held at the same time. Flaws within their questionnaire were not taking day trippers into account and "failure to ask respondents the number of people accounted for in their expenditure estimates" (p 196). However, in conclusion the authors state that the events did generate economic benefits to the region, but discuss problems with time switchers, and locals.

Gratton, C; Taylor, P; (1986). Economic impact study. Hayfield International Jazz Festival. *Leisure Management.* 6 (10), pp. 19-21

This article gives a brief view of the economic impacts to a small village, Hayfield – outside of Manchester, from a jazz festival held annually. This article gives a chart of the total expenditures directly associated with the festival along with the total expenditures.

The authors then give a brief account of multipliers and discuss the information obtained from the festival. The authors point out that during the festival the local hotels, motels, and campsite were completely full, the authors recommend that a study be done of the locals in order to discover the negative affects such as dissatisfaction with the event and amount of visitors to the local area. The authors do, however, conclude that the overall economic impact to the area was an increase from previous years.

Mitchell, C.; Wall, G.; (1986). Impacts of cultural festivals on Ontario communities. *Recreation Research Review.* 13 (1). pp. 28-37.

The objective of this article was to offer evidence that festivals and events attract outside visitors, increases sales of local businesses and attract new enterprises to the community. The authors, through Dun and Bradstreet Analysis, identify nine business types or groups which are relevant to the Blyth festival in Ontario, Canada. These are the following: agriculture, communications, construction, finance, manufacturing, retail, service, transportation, and wholesaling (p. 30). The authors found that prior to the era of festivals, agriculture, construction, financial, and transportation increased while retail (-9), service (-4) and manufacturing functions (-3) all declined. However, wholesale, transportation, service and retail functions increased during the festival period (tables and charts are given – p. 31).

The authors distributed a survey to the local businesses in the area in August of 1985 in order to evaluate which businesses rely heavily on the festival. Through this survey which netted a 95% response rate from retail, accommodations, and dining establishments found that three businesses had been formed as a direct result from the festival. The authors concluded that while the economic impact to the rest of the community was minimal at best, the overall impact of the festival was positive.

Felsenstein, D.; Fleischer, A. (2003). Local Festivals and Tourism Promotion: The Role of Public Assistance and Visitor Expenditure. *Journal of Travel Research.* Vol. 41 pp. 385-392.

The authors of this study of two festivals in Northern Israel discuss the rationalization for public assistance for these festivals. The authors present a method in order to account for increases in local income. The authors argue that most economic impact studies of festivals do not go far enough in their evaluation process and do not show how the income of the festival is distributed to the locals that are not directly involved with the festival.

In the authors methodology they separate local expenditures from local residents and non-local residents. The authors give a formula for calculating the economic growth which is represented by an increase in private and public income as a result of the festival. How they derived this formula and methodology is discussed at length by the authors. The conclusions of this article show that there is a net growth in personal and local income, but it needs to be kept in proportion. This is done by "accurately representing their full effects, avoiding double-counting and the inclusion of expenditures that would have occurred in the absence of the festival" (391).

Kim, K.; Uysal, M. (2003) Perceived Socio-Economic Impacts of Festivals and Events Among Organizer. *Journal of Hospitality & Leisure Marketing.* 10 (3/4) pp. 159-171.

The authors of this article discuss and argue two areas of interest; "(1) to delineate the organizers perception of socio-economic impacts of the festival and event tourism, and (2) to compare these results with those of attendees from the literature" (p 159). The authors discuss at length that while economic impacts are relatively easy to study and understand and give direct input and results back to the community, impacts such as noise, pollution, and congestion and are not easily measured and can result in negative attitudes within the community towards a festival, event or tourism in general.

The authors discuss the methodology, the instrument, and results (with charts and graphs) used in collecting and analyzing data from event organizers in the Commonwealth of Virginia. The authors concluded from

the survey that organizers perceived four socio-economic impacts and discuss the results of the following: community cohesiveness; economic benefits; social costs; and social incentives. The survey concluded that negative impacts such as crime, congestion, social costs and pressure on local services increased substantially. Policy considerations are suggested by the authors in order to give a more positive view of the event to the local communities.

Burgan, B; Mules, T.; (2001) Reconciling cost-benefit and economic impact assessment for event tourism. *Tourism Economics: the business and finance of tourism and recreation.* 7 (4) pp. 321-330.

The authors of this paper discuss the differences and benefits of economic impact analysis vs. cost-benefit analysis (CBA) approach to tourism events and festivals. The authors argue that there is "common ground" in regards to economic impact analysis and cost-benefit analysis. The authors discuss in detail the principles of CBA and the benefits the spending has on the community and region.

The paper concludes that economic impact analysis is an appropriate way to measure the costs/benefits of an event for a community.

Bernthal, M.; Regan, T. (2004). The Economic Impact of a NASCAR Racetrack on a Rural Community and Region. *Sport Marketing Quarterly.* 13, pp. 26-34.

The authors study the economic impact of multiple events at a NASCAR Racetrack to the region. Methodology of the study and results from using the IMPLAN model are discussed and charted. The authors determined the "amount of dollars that circulates" in the region as a result of the raceway. The authors give characteristics of those sampled and included locals in their study. Using IMPLAN the authors were able to determine the economic impact of the events to the region as well as where the attendees spent their monies. The authors discovered that more money was spent outside the track than inside and concluded that economic impact studies are "extremely valuable" as a marketing tool for NASCAR. The study also concluded that the impact to the area in direct, indirect and induced impacts were remarkable.

Stynes, D. J., Sun, Y. (2004). *Economic Impacts of National Heritage Area Visitor Spending: Summary Results from Seven National Heritage Area Visitor Surveys.* East Lansing, Michigan; Department of Community, Agriculture, Recreation and Resource Studies, Michigan State University.

The authors of this report summarize survey results to seven National Heritage Areas. They specifically look at four types of visitors: local residents, day trips from outside the local area, overnight trip stays in the local hotels and motels and overnight trip stays with friends or relatives. The authors discuss the methods of collecting the surveys, response rates and non-response bias for the mail back survey, and the economic impact methods. The authors used the MGM2 (money generation model) model.

The authors discuss the survey results which include the following: trip characteristics and awareness, lodging segments, spending profiles, and economic impacts of National Heritage Areas.

Stynes, D. J., Propst, D.B., Chang, W., Sun, Y. (2000). *Estimating national park visitor spending and economic impacts: The MGM2 model.* East Lansing, Michigan; Department of Community, Agriculture, Recreation and Resource Studies, Michigan State University.

Chhabra, D.; Sills, E.; Cubbage, F. (2003). The Significance of festivals to Rural Economies: estimating the Economic Impacts of Scottish Highland games in North Carolina. *Journal of Travel Research.* 41 pp. 421-427.

The authors of this paper discuss the economic impact of two Scottish festivals in North Carolina and how the impact depends on different characteristics of the festival and local economy (other attractions). The method used was self-administered surveys at the site of the festival. Analysis of the data collected was done with IMPLAN. The authors noted that lodging had the greatest economic impact on the area for multi-day festivals, whereas beverages and food had the greatest impact on single day festivals.

The authors noted also discussed the reasons behind the different multipliers for the festivals. They argue that this is due in part to the magnitude of each festival and area of leakage.

Snowball, J.; Antrobus, G. Valuing the arts: Pitfalls in economic impact studies of arts festivals.

The authors of this article argue that in the case of arts festivals economic impact studies do not quantify or estimate the value of such festivals and that the willingness to pay should be added into the survey.

The authors study the 'pitfalls' of economic impact studies. Theses include the following: defining the area of study, including local spectators, including time switchers and casuals, determining the size of the multiplier, and employment multiplier. It is further argued by the authors that economic impact studies do not take into account opportunity costs.

The authors concluding remarks argue that the true value of an arts festival cannot be measured using economic impact studies; rather contingent valuation methods should be used in order to discover the value or worth of an arts festival.

Dwyer, L.; Forsyth, P.; Spurr, R. (2005). Estimating the Impacts of Special Events on an Economy. *Journal of Travel Research.* 43 (4). pp. 351-359.

The authors of this article argue that the widely used Input-Output analysis in special events or festivals is rejected in other areas of economic impacts. The authors discuss and contrast comprehensive computable general equilibrium (CGE) as the alternative to the traditional I/P models. The authors argue that the CGE model gives a better description and broader base of the impact by increase tourism to an area.

The authors argue that the CGE model best illustrates the impact of an event on the economy as a whole and that this will allow the government agencies to do a better cost analysis and benefits of such events.

Jackson, J.; Houghton, M.; Russell, R.; Triandos, P. (2005). Innovations in Measuring Economic Impacts of Regional Festivals: A Do It Yourself Kit. *Journal of Travel Research.* 43 pp. 360-367.

The authors of this article have developed a tool in which festival and event organizers can use a "do it yourself" kit to measure the economic impacts of a festival or event to the region. This kit is designed to be inexpensive, duplicated, and replicated. The article discusses the importance of festivals and the importance of evaluating the festival impacts. Discussion of how the team disseminated the kit to the region and managers is discussed.

Results of the case study showed that the response rate was close to 100% and was used by small and large events and festivals. Reception of the kit was good as several organizers requested to use again in the future.

The authors concluded that this kit would help to standardize the criteria for evaluating the economic impact or significance of an event. This would help organizers to better market their festival or event.

B. Ungated Events

Brothers, G.L., & Brantley, V. (1993). Tag and Recapture: testing an attendance estimation technique for an open access special event. Festival Management & Event Tourism, Vol. 1, pp. 143-146.

The authors of this article discuss a standardized methodology of estimating number of visitors at open access festivals and events. They tested the "tag and recapture" method which is used in counting the population of wildlife. The authors discuss the methodology behind "tag and recapture" and give formulas to utilize.

The authors concluded that the "tag and recapture" method was fairly accurate in the estimation of the visitors to the event, but said that the number of visitor tagged should have been increased to further increase accuracy.

Caughley, G. (1974). Bias in aerial surveys. *The Journal of Wildlife Management.* Vol. 38, pp. 921-933.

The author argues that in large mammal aerial census there seems to be some bias. The accuracy deteriorates with larger transect width, speed and altitude. He discusses the weaknesses with aerial surveys and how to decrease bias. The author suggests techniques in which bias can be eliminated from the study. Caughley gives a method in which the bias can be measured and correct the estimates. The author concludes with a seven step process in which to decrease or account for bias in estimation.

Hofstee, P. (1984). Simple and cheap do-it-yourself technique. *Cities*. 1 (3) pp. 243-247.

This author discusses the economically viable method of small format aerial photography used to approximate maps of cities. The author states that it only requires a single engine airplane, pilot and photographer. This method is used when "no precision mapping is required". The author discusses how the light aircraft do not need airports but can take off from pastures, roads, football fields, etc.

Myers, R.A., & Bowen, W.D. (1989). Estimating bias in aerial surveys of Harp Seal production. *Journal of Wildlife Management.* Vol. 53, pp. 361-372.

This article suggests ways in which to reduce bias in aerial surveys. However, this article primarily discusses the inability of aerial photography to locate all whelping grounds of the Harp Seal. The authors do provide equations in which to reduce bias in aerial photography.

Ralston, L.S. (1992). The Application of Systematic Survey Methods at Open Access Special Events and Festivals. *Visions in Leisure and Business*, 11(3), 18-24.

This article discusses and attempts to validate the use of self-administered surveys at an open access event. The author talks about previous literature in regards to this method. Un-gated and multi-entrance events and the method in which to distribute the survey materials are discussed.

Raybould, M., Mules, T., Fredline, E., & Tomljenovic, R. (2000). Counting the herd using aerial photography to estimate attendance at open events. *Event Management.* Vol. 6, pp. 25-32.

The authors discuss the need for researchers estimating attendance to open access daytime events in which economic impact studies are being conducted. The researchers discuss other methods such as tag and recapture, parade counts, entrance and exit counts, and finally aerial photography. The conclusion from these authors is that no one method is right for all applications. However, the authors suggest that for daytime, open air events aerial photography is the most cost effective method.

Sutherland, W.J. (1996). Mammals In W.J. Sutherland (Ed). *Ecological census techniques: A handbook*. pp. 260-278. Melbourne, Australia: Cambridge University Press.

The author of this chapter discusses the problems with counting mammals that are secretive or "out of view" of the counter. Methods are suggested along with advantages and disadvantages for counting large mammals in wildlife as well as bias. Strip and line transects, aerial strip and line transects are discussed in some detail and examples given. One method described in counting practices in the call method. This is where the vocalizations of mammals can be recorded and then counted. Advantages, disadvantages and bias are given for this method as well.

Other methods such as trapping and counting footprints and runways are discussed but the author suggests that counting footprints only gives the observer a sense of how dense the population is.

Trenkel, V.; Buckland, S.; McLean, C.; & Elston, D. (1997). Evaluation of Aerial Line Transect Methodology for Estimating Red Deer (*Cervus elaphus)* Abundance in Scotland. *Journal of Environmental Management.* 50, pp. 39- 50.

The authors of this article compare three studies performed in Scotland on Red Deer. The authors argue that aerial line transect surveys were adequate in estimating the number of deer in the population as well as stags, hinds and calves. The authors discuss the efficiency of the aerial line transect versus conventional ground based census. The authors find that the aerial line transect greatest us is when a large area is being censused and the population is large whereas, a ground census is better for small populations.

Tyrrell, T.J., Williams, P., & Johnston, R.J. (2003). How Many Visitors Were There? Presented to the 53rd AIEST Congress. Athens, Greece. September 10.

This article discusses ways in which to identify at a multi-event where ticketed patrons may come and go to several different venues. Survey data are discussed as to what should be collected and how. A visitor count model is diagrammed in order to estimate the number and types of visitors to a multi-venue event.

Vaughan, D.R., Farr, H. & Slee, R.W. (2000). Estimating and interpreting the local economic benefits of visitor spending: an explanation. *Leisure Studies*. Vol. 19, pp. 95-118.

This article discusses the use of economic impacts of visitor spending and addresses the issue of validity, relevance, and interpretation as well as data collection and analysis. The authors discuss the methodology of a three year study from Exmoor National Park. This paper discusses various ways to collect data through sampling and how to develop questionnaires. Discussed at length is direct, indirect and induced impacts and how to analyze these.

APPENDIX VI: SAMPLE TALLY QUESTION LIST AND TALLY FORM

You can print all the tally questions on a single sheet of paper. Interviewers should read from this sheet to administer the interview, and record responses on a "tally sheet". Samples of these materials are provided. You should, of course, customize them to meet your needs.

Stint Identification Every assigned stint in your study should have a unique number. This number should be recorded on each Tally sheet and each set of materials provided for counting entrants.

Interviewer Identification The interviewer's name should be recorded on each Tally sheet for quality control.

Tally Box **Refusals** you must be able to measure the response rate to the Tally Process. Thus, you must have a mechanism in the Tally process to record the number of people who decline/refuse your efforts to interview them as they enter the site.

Introduction Hi, my name is XXXX INTERVIEWER'S FIRST NAME. Welcome to NAME ATTRACTION. Before you start your visit here today, I'd like to ask you just a few questions so we can learn more about who is coming to this attraction. (TO TAKE RESPONDENT OUT OF TRAFFIC FLOW: Could you and others who are here with you today just step aside for a couple of minutes?)

Questions

1-a) Have you already been stopped to answer questions about NAME ATTRACTION ***today***?

No	[ ]	
Yes	[ ]	IF YES, THANK RESPONDENT & TERMINATE

1-b) **THIS QUESTION IS REQUIRED *ONLY* FOR TALLY INTERVIEWS CONDUCTED AT INTERNAL LOCATIONS (REFRESHMENT KIOSKS, WASHROOM LINE-UPS, ETC. A space to record responses to Q.1-b) is <u>not</u> included in the sample Tally Sheet because the need for extra tally locations other than "gates" or "entrances" is not common for most attractions. If you do set up extra tally sites within the attraction, you would need to provide a place in the tally sheet to record this information..**

At which location and time did you first enter the site today?

Location	(pre-list to correspond to entrances)
Time Period	(pre-list to correspond to stint time periods)

2. Is XXXX (NAME CITY/TOWN IN WHICH ATTRACTION IS LOCATED) your permanent place of residence (SHOW MAP*)?

Yes	[ ]	LOCAL: SKIP TO Q.
No	[ ]	NON-LOCAL: ASK Q.3

*The map should display clear boundaries of what the attraction has defined to be the "local area".

3-a) **IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF ATTRACTION, ASK: In which city/town, province/ state/country is your permanent residence?** IF CANADA OR USA, ASK: And what is your postal/zip code?

City/Town	_____
Province/Territory/State	_____
Country	_____
IF CANADA/USA: Postal/Zip Code	_____

3-b) **IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF ATTRACTION, ASK:** Are you on an out-of-town trip from your permanent place of residence?

No	[ ]	
Yes	[ ]	IF YES, ASK 3-c)

3-c) Have you or will you be spending at least one night away from home on this trip?

No [ ]
Yes [ ]

4-a) How many people who live in your household came to NAME ATTRACTION with you today?
IF MORE THAN ONE PERSON IN PARTY, ASK: And how many, if any, of these people are under [XX] years of age?

Total number in household travel party _____ IF MORE THAN ONE PERSON IN PARTY OR IF ANY LOOK TO BE TEENS/CHILDREN, ASK 4-b). OTHERS, SKIP TO Q.5

4-b) And how many, if any, of these people are under [XX] years of age?

Number under [XX] years _____

5. How many people in your group, if any, are [Are you*] here as staff, , media or volunteer to help at the attraction today? RECORD OPPOSITE APPROPRIATE EXCLUDED CATEGORY. IF ALL PARTY MEMBERS ARE "EXCLUDED", RECORD ON TALLY SHEET & TERMINATE

CODE		#
A.	Staff	_____
B.	Media	_____
C.	Volunteer	_____

*wording change required if a one person party

6. Which type of ticket(s) did you use today to enter NAME ATTRACTION? OPTIONAL, depends on circumstances of Attraction. See Tally Procedures)

CODE		
A.	Individual day ticket	[ ]
B.	Individual attraction pass [multi-day pass]	[ ]
C.	Family day ticket	[ ]
D.	Family attraction pass [multi-day pass]	[ ]
E.	NO TICKET (Comp., Staff, etc.)	[ ]

OTHER (WRITE IN) _____

7. IF OUT-OF-TOWN VISITOR: Over the full course of your planned stay in this area, on how many different days have you/do you plan to visit this attraction, counting today's visit?

WRITE IN NUMBER OF DAYS _____

DON'T KNOW/CAN'T ESTIMATE [ ]

RECRUITING FOR ATTENDEE SPENDING SURVEY

8-a) **FOR NON-LOCAL ATTENDEES ONLY** (Skip this question for local attendees). Have you or has anyone else in your household party received a questionnaire to complete, either today or on a previous day you came to the attraction *during this trip*?

No	[ ]	GO TO NEXT QUESTION
Yes	[ ]	You need only complete one questionnaire for all your visits to this attraction on this trip. Thank you for your cooperation and enjoy your stay here today.

8-b) Non-local

NON-LOCAL: In order for us to learn more about your reactions to NAME ATTRACTION and spending on your trip, would **the person most able to report on spending** for all people in your household who are on the trip with you please complete this short survey just before you leave the site today? You can drop the completed questionnaire in one of the specially labelled boxes near the exits or return it to us by mail in the postage paid envelope we have provided.

IF USING AN INCENTIVE, CONSTRUCT THE APPROPRIATE STATEMENT: As a thank you for your cooperation, once we have your completed survey, we will provide you with/ you will have a chance to win [NAME PRIZE], etc.

Refuses to accept questionnaire	[ ]	
Accepts questionnaire	[ ]	RECORD UNIQUE ID FROM Q'AIRE ON TALLY SHEET

IF ACCEPTS: Could I please have a telephone number (including area code) where I can reach you at home and the first name of the person who will complete this survey, just in case we have to follow-up on any of your answers?

RECORD PHONE NUMBER
RECORD FIRST NAME OF RESPONDENT

8-b) Local

LOCAL: In order for us to learn more about your reactions to NAME ATTRACTION and spending at this attraction, would **the person most able to report on spending** for all people in your household who came to this attraction with you please complete this short survey just before you leave the site today? You can drop the completed questionnaire in one of the specially labelled boxes near the exits or return it to us by mail in the postage paid envelope we have provided.

IF USING AN INCENTIVE, CONSTRUCT THE APPROPRIATE STATEMENT: As a thank you for your cooperation, once we have your completed survey, we will provide you with/ you will have a chance to win [NAME PRIZE], etc.

Refuses to accept questionnaire	[ ]	
Accepts questionnaire	[ ]	RECORD UNIQUE ID FROM Q'AIRE ON TALLY SHEET

IF ACCEPTS: Could I please have a telephone number (including area code) where I can reach you at home and the first name of the person who will complete this survey, just in case we have to follow-up on any of your answers?

RECORD PHONE NUMBER
RECORD FIRST NAME OF RESPONDENT

Thank respondent for his/her cooperation.

INTERVIEWER NOTE: REMEMBER TO WRITE UNIQUE ID NUMBER FROM ATTENDEE SURVEY FORM ON YOUR TALLY SHEET BEFORE DISTRIBUTING THE ATTENDEE QUESTIONNAIRE.

Sample Tally Sheet

(Does not include extra questions for tallies at locations *within* the attraction site (at food kiosks, washroom lines, etc.) to capture entrance/time of entry. These questions are required if tallies are conducted *within* the site.)

Stint ID (Write in)_____ **Interviewer ID (Write in)**_____

Refusals: STRIKE THROUGH *NEXT* NUMBER FOR EACH INDIVIDUAL THAT REFUSES TO PARTICIPATE WHEN APPROACHED.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49

	Q1.		Q.2		Q.3-a				Q. 3-b		Q. 3-c		Q. 4-a)	Q. 4-b)	Q.5				Q.6		Q.7	Q. 8 Recruitment for Attendee Survey						
	Already Tallied Today (IF YES, ENTER ON TALLY & TERMINATE)		Local/Non-Local		Place of Residence (Non-Local only) (WRITE IN)				Out-of Town Trip		Nights Away		Total in Household Party	# Under XX Years	# in HH Party in Each Excluded Category (ENTER # FOR EACH CODE) IF ALL HH MEMBERS ARE EXCLUDED, ENTER ON TALLY SHEET & TERMINATE				Type of Ticket (Write in Code)		# of days at attract-ion on trip					Telephone #		First Name
	Yes	No	Local	Non-Local	City	Prov/Terr State	Country	Postal Code/Zip	No	Yes	No	Not Asked			All	A	B	C	Code	Other (Write in)	(Write in)	Not Asked (interval)	Not Distributed - Already Has Q'aire	Refusal	Accepts **WRITE IN UNIQUE ID FROM ATTENDEE SURVEY**	Area Code	Number	
1																																														
2																																														
3																																														
4																																														
5																																														
6																																														
7																																														
8																																														
9																																														
10																																														
11																																														
12																																														

APPENDIX VII: SAMPLE ATTENDEE SURVEY QUESTIONNAIRES (NON-LOCAL & LOCAL VERSIONS)

NON-LOCAL VERSION

INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE

Who should complete this survey?	An adult on the trip that included a visit to NAME ATTRACTION who is **most able to report on spending and activities** for *all* people in this household who went on the trip.
Why is the survey important?	Information you provide will help NAME ATTRACTION organizers plan for the future and demonstrate the benefits the attraction brings to the community and to people like yourself.
Is the information I provide kept confidential?	Yes. All information collected in the survey is used only for statistical analysis. Your responses are never associated with your name and all information you provide is confidential and anonymous. If you want to receive the NAME INCENTIVE be entered in the NAME CONTEST, include your name, address and telephone number in the space provided. This information will be detached from your survey responses and discarded once your gift has been sent/the winner has been notified.
Who can I call to verify the legitimacy of the survey?	Here is a number you can call if you have any questions or wish to verify the legitimacy of the survey (INSERT PHONE NUMBER)
What do I do with the completed survey?	There are "drop off" boxes at the entrance/exit or mail it back to us in the postage paid envelope we have provided. The cut-off date for processing returns is **Day-Month-Year**.
Freedom of Information	To be inserted (check with local authorities to determine exact wording)
What is the "local" area or "community"?	Please refer to the **map** included in this questionnaire to identify the boundaries of the "local community" when answering questions about where you spent nights and money.
What is "on-site" spending?	By "on-site" (spending), we mean within the attraction's immediate area. For example, if you parked at the attraction's parking facility, you would write in your parking costs under "on-site spending", but if you parked a few blocks away, you would enter your parking costs (along with any other parking you paid for on this trip) in "other spending".
What if I have more than one copy of the questionnaire?	Complete only ONE questionnaire for the **entire trip** that included one or more visits to NAME ATTRACTION.
What if my trip is not over yet?	If your trip is not over, please provide your best estimate of how much money you will spend at NAME ATTRACTION for *all* your visits to the attraction and on the **entire trip**. Please provide your best estimate of spending for yourself and all other household members (people who live in the same permanent residence) who came on the trip with you.

PROVIDE MAP THAT CLEARLY DISPLAYS THE BOUNDARIES OF THE ATTRACTION SITE'S COMMUNITY ("LOCAL") AND THE BALANCE OF THE PROVINCE, TERRITORY OR STATE FOR WHICH YOU PLAN TO ESTIMATE THE TOURISM ECONOMIC IMPACT.

NON-LOCAL VERSION

Stint ID: _____

Unique ID: _____ (PRE-PRINT A UNIQUE NUMBER ON EACH ATTENDEE SURVEY BEFORE DISTRIBUTION. RECORD THIS NUMBER ON TALLY SHEET WHEN THE QUESTIONNAIRE IS HANDED OUT.)

ABOUT YOUR TRIP (EVERYONE ANSWERS)

WHERE DO YOU LIVE? (Write in)

City/Town _____
Prov/Terr/State _____
Country _____
IF CANADA/USA:
Postal/Zip Code _____

HOUSEHOLD MEMBERS ON TRIP

	1	2	3	4	5	6	Other
Total (including yourself)							WRITE IN

	0	1	2	3	4	5	Other
Number under 18 years							WRITE IN

MAIN DESTINATION OF TRIP (Write in)

City/Town _____
Prov/Terr/State _____
Country _____

NIGHTS AWAY FROM HOME ON ENTIRE TRIP

NONE

Number of nights you plan to be away from home on entire trip _____ nights

IF ANY NIGHTS AWAY FROM HOME

LODGING NIGHTS (have or plan to spend in each location before returning home from trip)

	[NAME LOCAL COMMUNITY] # of nights	Other Parts of [NAME PROV/TERR/STATE] # of nights
Hotel, resort, lodge, etc.	_____	_____
Motel	_____	_____
B&B	_____	_____
Campground/RV Park	_____	_____
Other paid lodging	_____	_____
Private home or cottage (unpaid)	_____	_____
Other unpaid lodging	_____	_____

NUMBER OF <u>DIFFERENT</u> DAYS VISITED/PLAN TO VISIT [NAME ATTRACTION] ON *THIS* TRIP

WRITE IN # OF DAYS –

EVERYONE ANSWERS

MAIN TYPE OF TRANSPORTATION
(Type used to travel greatest distance on trip)

Auto/truck/motorhome
Inter-city bus
Train
Airplane
Boat/ship
Other

EVERYONE ANSWERS

HOUSEHOLD MEMBERS WHO WENT TO [ATTRACTION]

	1	2	3	4	5	6	Other
Total (including yourself)							WRITE IN

	0	1	2	3	4	5	Other
Number under 18 years							WRITE IN

EVERYONE ANSWERS

IMPORTANCE OF ATTRACTION IN DESTINATION CHOICE

Write in the number between 0 and 10 below that best describes how important each of the following was in your decision to visit [NAME CITY/TOWN OF ATTRACTION] on this trip, where 0 indicates no influence and 10 is the main single reason for visiting [NAME CITY/TOWN] on this trip. You can assign different numbers to each category listed, so long as the total adds up to 10.

[INSERT NAME OF YOUR ATTRACTION]	_____
Other attractions/events in [NAME CITY/TOWN] [END HERE OR ADD UP TO 4 TYPES OF "OTHER" ATTRACTIONS/EVENTS AVAILABLE IN YOUR COMMUNITY]	_____
Visiting family or friends	_____
Business	_____
Other	_____
Total (must add to 10)	10
Don't Know	X

SIMILAR RECREATIONAL ACTIVITIES IN COMMUNITY

If you had *not* attended [NAME ATTRACTION] on this trip, would you have gone to some other attraction or event instead? Please refer to the map, if necessary.

	IN [NAME COMMUNITY]	IN [OTHER PARTS OF PROV/TERR/ STATE]
No		
Yes		
Don't Know		

OTHER ATTRACTIONS VISITED IN COMMUNITY ON *THIS* TRIP *(OPTIONAL)*

Which of the following attractions have you or do you plan to go to in [NAME CITY/TOWN OF ATTRACTION] on this trip? CIRCLE ALL THAT APPLY

LIST "SIMILAR ATTRACTIONS"	
Museum ABC	1
XYZ Gallery	2
MN Movie House	3
OTHER (Write in)	_____

TIME SPENT AT ATTRACTION ON *THIS* TRIP *(OPTIONAL)*

And how much time have you or do you plan to spend at [NAME ATTRACTION] while visiting [NAME CITY/TOWN] on this trip? If you have or intend to make more than one visit to this attraction, please add up all the time you will have spent here **over the entire trip**.

Less than 1 hour	1
1 to 3 hours	2
4 to 6 hours	3
7 to 10 hours	4
More than 10 hours	5
Don't Know	6

a) SPENDING FOR ALL HOUSEHOLD MEMBERS ON THE TRIP (EVERYONE ANSWERS)

- ***Provide your best estimate for the entire duration of your planned stay in [NAME OF LARGEST AREA INCLUDED IN ECONOMIC IMPACT ASSESSMENT]. Please include the following:***
  - ***Cash, credit cards, debit cards, travellers cheques.***
  - ***Travel packages you might have purchased for goods or services used on this trip (such as lodging, admission to attractions or events, meals, vehicle rental, airfare or bus fare, etc.).***
  - ***Taxes and tips.***
- ***Please report your spending in XX currency for you and all other household members on trip with you.***
- **For each item, check box ( ) if any money was spent on the item and provide your best estimate of the amount. If you cannot estimate the amount, check the "Don't Know" box for the item and complete the "Total Amount" at the end of each list.**
- **For "OTHER SPENDING" IN [NAME OF LARGEST AREA], please provide the proportion of your spending that was or will be done in [NAME COMMUNITY].**

ON-SITE SPENDING AT [NAME ATTRACTION]

If you went or plan to go to NAME ATTRACTION on more than one day while on *this* trip, please write in your best estimate of the ***total*** amount you have or will spend on ***all*** your visits to the attraction for each category.

	Spent Any?	**Amount in XX$** (currency)
Admission to [NAME ATTRACTION] (including tickets purchased in advance)		$_____.00 Don't know
Other on-site tickets/ admissions (special events, concerts, etc. held at the attraction but not included in the general admission price)		$_____.00 Don't know
Food & beverages at restaurants, fast food outlets, concessions		$_____.00 Don't know
At lounges, bars, clubs at the attraction		$_____.00 Don't know
Souvenirs/gift shop purchases		$_____.00 Don't know
Other shopping/retail		$_____.00 Don't know
Parking		$_____.00 Don't know
TOTAL Total spent/will spend at [NAME ATTRACTION] site		$_____.00 Don't know

ANY PLANE, TRAIN, INTER-CITY BUS, SHIP TICKETS BOUGHT FOR TRIP?

No
Yes
IF YES: Was that a . . . ?
domestic transportation company
foreign transportation company

Total spent on transportation tickets for all household members in XX currency (WRITE IN) $_____.00

Don't know

OTHER SPENDING IN [NAME OF LARGEST AREA] (excluding ON-SITE spending) **See note.**

	Spent Any?	**Amount in XX$** (currency)	**Proportion spent/will spend in** [NAME COMMUNITY]
TRANSPORT			
Gasoline/repairs for vehicle		$_____.00 Don't know	_____% Don't know
Vehicle rental		$_____.00 Don't know	_____% Don't know
Parking		$_____.00 Don't know	_____% Don't know
Local taxis, local buses, subways		$_____.00 Don't know	_____% Don't know
FOOD & BEVERAGES			
Groceries/beverages (at grocery/liquor stores)		$_____.00 Don't know	_____% Don't know
Food & beverages at restaurants		$_____.00 Don't know	_____% Don't know
At lounges, bars, clubs		$_____.00 Don't know	_____% Don't know
SHOPPING			
Clothing		$_____.00 Don't know	_____% Don't know
Other shopping		$_____.00 Don't know	_____% Don't know
LODGING			
Lodging (including camping fees)		$_____.00 Don't know	_____% Don't know
RECREATION			
Other recreation/ entertainment (excluding ATTRACTION)		$_____.00 Don't know	_____% Don't know
OTHER			
All other spending		$_____.00 Don't know	_____% Don't know
TOTAL All spending during planned stay in [NAME LOCATION]		$_____.00 Don't know	_____% Don't know

ABOUT [NAME ATTRACTION] (OPTIONAL)

OVERALL RATING OF ATTRACTION

Very Unsatisfied									Very Satisfied	Don't Know
1	2	3	4	5	6	7	8	9	10	X

RATING OF ATTRACTION FOR VARIOUS CHARACTERISTICS

	Very Unsatisfied									Very Satisfied	No Opinion
Quality of Exhibits	1	2	3	4	5	6	7	8	9	10	**x**
Educational Value	1	2	3	4	5	6	7	8	9	10	**x**
Being Interesting/Fun	1	2	3	4	5	6	7	8	9	10	**x**
Washrooms	1	2	3	4	5	6	7	8	9	10	**x**
Parking	1	2	3	4	5	6	7	8	9	10	**x**

Add characteristics or replace those shown, if desired.

ATTENDANCE AT [NAME ATTRACTION] IN PAST 3 YEARS
(mark all that apply)
- Never attended before
- Attended last year
- Attended two years ago
- Attended three or more years ago

LIKELIHOOD OF RETURNING TO ATTRACTION INNEXT 12 MONTHS
- Definitely would return
- Probably would return
- Might or might not return
- Probably would not return
- Definitely would not return
- Don't Know/No Opinion

WHERE FIRST HEARD ABOUT [NAME ATTRACTION]
(mark ONE only)
- Newspaper
- Radio
- Television
- Magazine
- Billboard or poster
- Word of mouth from friends/relatives
- Other

You can request the respondent to write in the name of the media source if you wish to have this additional information.

ABOUT YOU AND YOUR HOUSEHOLD (OPTIONAL)

YEAR OF BIRTH

_____

GENDER
- Male
- Female

HOUSEHOLD COMPOSITION
- All household members 18 years of age or over
- Any household members under 18 years
- Any household members under 12 years

HERE'S HOW TO RETURN YOUR COMPLETED QUESTIONNAIRE

Please drop this completed questionnaire in one of the specially marked boxes or mail it back to us in the postage paid envelope provided. [INSERT MAILING ADDRESS HERE].

If you have any questions about this study, please contact:
NAME OF CONTACT PERSON
PHONE NUMBER

THANK YOU FOR YOUR COOPERATION!

YOUR CHANCE TO WIN!

If you are interested in winning XX/receiving your [GIFT], please provide your name and complete mailing address so we can contact you. This information will be separated from your answers to this questionnaire so your responses will be anonymous and confidential. To have a chance to win/receive your gift, we must have your completed questionnaire no later than [**INSERT DEADLINE**].

Your Name _____
City/Town _____
Prov/Terr/State _____
Country _____
IF CANADA/USA:
Postal/Zip Code _____

NOTE: This sample questionnaire is designed to produce tourism economic impact inputs at the local and provincial or state level. You can, however, add additional "attraction accounts", depending on the number of geographical impact areas you wish to assess. For example, you can add columns to the questionnaire and in the analysis such that you can estimate the tourism economic impact for the *local community*, *county*, and *province/territory/state.*

LOCAL VERSION

INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE

Who should complete this survey?	An adult who is **most able to report on spending** for *all* people in this household who went to NAME ATTRACTION.
Why is the survey important?	Information you provide will help NAME ATTRACTION organizers plan for the future and demonstrate the benefits the attraction brings to the community and to people like yourself.
Is the information I provide kept confidential?	Yes. All information collected in the survey is used only for statistical analysis. Your responses are never associated with your name and all information you provide is confidential and anonymous. If you want to receive the NAME INCENTIVE be entered in the NAME CONTEST, include your name, address and telephone number in the space provided. This information will be detached from your survey responses and discarded once your gift has been sent/the winner has been notified.
Who can I call to verify the legitimacy of the survey?	Here is a number you can call if you have any questions or wish to verify the legitimacy of the survey (INSERT PHONE NUMBER)
What do I do with the completed survey?	There are "drop off" boxes at the entrance/exit or mail it back to us in the postage paid envelope we have provided. The cut-off date for processing returns is **Day-Month-Year**.
Freedom of Information	To be inserted (check with local authorities to determine exact wording)
What is "on-site" spending?	By "on-site" (spending), we mean within the attraction's immediate area. For example, if you parked at the attraction's parking facility, you would write in your parking costs under "on-site spending", but if you parked a few blocks away, you would *NOT* enter your parking costs.
What if I have more than one copy of the questionnaire?	If you received more than one questionnaire, please complete ONLY one questionnaire for today's visit at NAME ATTRACTION.
What if I don't know exactly what I/all members of my household spent?	Please provide your best estimate of spending for yourself and all other household members (people who live in the same permanent residence) who came to NAME ATTRACTION with you today attraction.

LOCAL VERSION

Stint ID: _____

Unique ID: _____ (PRE-PRINT A UNIQUE NUMBER ON EACH ATTENDEE SURVEY BEFORE DISTRIBUTION. RECORD THIS NUMBER ON TALLY SHEET WHEN THE QUESTIONNAIRE IS HANDED OUT.)

WHERE DO YOU LIVE? (Write in)

City/Town _____
Prov/Terr/State _____
Country _____
IF CANADA/USA:
Postal/Zip Code _____

OVERALL RATING OF ATTRACTION

Very Unsatisfied									Very Satisfied	Don't Know
1	2	3	4	5	6	7	8	9	10	X

TIME SPENT AT ATTRACTION TODAY *(OPTIONAL)*

And how much time have you or do you plan to spend at [NAME ATTRACTION] today?

Less than 1 hour	1
1 to 3 hours	2
4 to 6 hours	3
7 to 10 hours	4
More than 10 hours	5
Don't Know	6

OTHER ATTRACTIONS VISITED IN COMMUNITY TODAY *(OPTIONAL)*

Which of the following attractions have you or do you plan to go to in [NAME CITY/TOWN OF ATTRACTION] today? CIRCLE ALL THAT APPLY

LIST "SIMILAR ATTRACTIONS"	
Museum ABC	1
XYZ Gallery	2
MN Movie House	3
OTHER (Write in)	_____

ON-SITE SPENDING AT [NAME ATTRACTION] TODAY

- **Please report your spending in XX currency for <u>you and all other household members who came with you to the [ATTRACTION].</u>**
- **By "on the attraction site" we mean within the boundaries of the attraction. If you parked or purchased food, beverages or souvenirs *near* but not *on* the site, you would NOT include this spending.**
- **Provide your best estimate, including cash, credit cards, debit cards, travellers cheques. Include taxes and tips. Please report your spending in XX currency.**
- **For each item, check box ( ) if any money was spent on the item and provide your best estimate of the amount. If you cannot estimate the amount, check the "Don't Know" box for the item and complete the "Total Amount" at the end of each list.**

Please write in your best estimate of the ***total*** amount you and other household members who were with you at today's visit to NAME ATTRACTION spent for each category.

	Spent Any?	**Amount in XX$** (currency)
Admission to [NAME ATTRACTION] (including tickets purchased in advance)		$_____.00 Don't know
Other on-site tickets/ admissions (special events, concerts, etc. held at the attraction but not included in the general admission price)		$_____.00 Don't know
Food & beverages at restaurants, fast food outlets, concessions		$_____.00 Don't know
At lounges, bars, clubs at the attraction		$_____.00 Don't know
Souvenirs/gift shop purchases		$_____.00 Don't know
Other shopping/retail		$_____.00 Don't know
Parking		$_____.00 Don't know
TOTAL Total spent at [NAME ATTRACTION]		$_____.00 Don't know

RATING OF ATTRACTION FOR VARIOUS CHARACTERISTICS (OPTIONAL)

	Very Unsatisfied									Very Satisfied	No Opinion
Quality of Exhibits	1	2	3	4	5	6	7	8	9	10	x
Educational Value	1	2	3	4	5	6	7	8	9	10	x
Being Interesting/Fun	1	2	3	4	5	6	7	8	9	10	x
Washrooms	1	2	3	4	5	6	7	8	9	10	x
Parking	1	2	3	4	5	6	7	8	9	10	x

Add characteristics or replace those shown, if desired.

ATTENDANCE AT [NAME ATTRACTION] IN PAST 3 YEARS
(mark all that apply)

- Never attended before
- Attended last year
- Attended two years ago
- Attended three or more years ago

LIKELIHOOD OF RETURNING ATTRACTION IN NEXT 12 MONTHS

- Definitely would return
- Probably would return
- Might or might not return
- Probably would not return
- Definitely would not return
- Don't Know/No Opinion

WHERE <u>FIRST</u> HEARD ABOUT [NAME ATTRACTION]
(mark ONE only)

- Newspaper
- Radio
- Television
- Magazine
- Billboard or poster
- Word of mouth from friends/relatives
- Other

You can request the respondent to write in the name of the media source if you wish to have this additional information.

ABOUT YOU AND YOUR HOUSEHOLD (OPTIONAL)	
YEAR OF BIRTH _____	**GENDER** Male Female **HOUSEHOLD COMPOSITION** All household members 18 years of age or over Any household members under 18 years Any household members under 12 years
THANK YOU!	**YOUR CHANCE TO WIN!**
Please drop this completed questionnaire in one of the specially marked boxes or mail it back to us in the postage paid envelope provided. [INSERT MAILING ADDRESS HERE]. If you have any questions about this study, please contact: NAME OF CONTACT PERSON PHONE NUMBER	If you are interested in winning XX/receiving your [GIFT], please provide your name and complete mailing address so we can contact you. This information will be separated from your answers to this questionnaire so your responses will be anonymous and confidential. To have a chance to win/receive your gift, we must have your completed questionnaire no later than [**INSERT DEADLINE**]. Your Name _____ City/Town _____ Prov/Terr/State _____ Country _____ IF CANADA/USA: Postal/Zip Code _____