

**Guidelines: Survey Procedures for Tourism Economic Impact  
Assessments of Gated Spectator Sporting Events**

Prepared for:

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## I. WHAT IS THIS GUIDEBOOK ALL ABOUT?

### A. Introduction

#### 1. Background

Sporting event organizers are often called upon to make estimates of tourism-related economic impacts to justify their requests for support from private and public sector sponsors. Some of these events 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*. Supported by a variety of tourism organizations, the original materials were designed for event and festival organizers and are available under separate cover.<sup>1</sup>

#### 2. Goals

These guidelines are provided by the British Columbia Ministry of Sport, Tourism and the Arts (MSTA) as a tool to enable organizers of sporting events across British Columbia to produce more credible and consistent inputs for estimating their **tourism economic impact**<sup>2</sup>. A new level of consistency and professionalism will be brought to this important measurement task as spectator sporting event organizers adopt the guidelines as *minimum standards*.

Specifically, these guidelines are designed for sporting events in which most spectators are *not* participants and with *controlled* access (“gates”). In other words, tickets are sold to spectators or there are other ways to control points of entry/exit to the site(s) at which the event is being held.

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<sup>1</sup> See the Appendix I for a list of funding and supporting partners for the original project. For more information on other guidelines available, see Tourism British Columbia’s website (<http://www.tourismbc.com>, click on “Research” and “Resources for Researchers”).

<sup>2</sup> These guidelines are designed to allow organizers of gated sporting events (in which most spectators are *not* participants) 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 studies of larger events. These guidelines are most appropriate for sporting events with 50,000 or fewer “net” attendees. “Net” attendees are unique visitors to an event. Thus, if the same individual attends the event on three separate days, he or she is counted only once in the “net attendance” count. Similarly, the person who attends the event on only one day is counted once in the “net attendance” estimate.



### 3. Alternative approaches and options

These guidelines describe only some of the challenges and options for estimating inputs for measurement of the tourism economic impact of spectator sporting events. There is a large body of literature on this subject which readers are advised to review. For example, *Toward a Destination Visitor Attendance Estimation Model: Whistler, British Columbia, Canada* provides field experiences with an *ungated* site (Whistler) and describes some of the measurement challenges associated with this type of environment.<sup>3</sup> Another paper entitled *How Many Visitors Were There?* addresses measurement issues associated with sporting events such as the Canada Winter Games where ticketed patrons may come and go at several different venues.<sup>4</sup>

### 4. Different information needs, sporting event types, and measurement requirements

Sporting event organizers and planners have different information needs and are responsible for different types of events. In turn, information needs and event types require different measurement plans and tools. To determine which of the following sets of guidelines is most appropriate to meet your needs, use the definitions provided below.

1. *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated Spectator Sporting Events*
2. *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Participant Sporting Events*

The Guidelines are **not appropriate** for *all* types of sporting events. Specifically, they are not suitable for *ungated events* (see definition below) and they do *not* provide tools to estimate the economic impact of on-site or future commercial sales that may be stimulated by an event.

In effect, the spending estimates and economic benefits discussed in these Guidelines are limited to those that are deemed “touristic”.<sup>5</sup> Note that the Guidelines focus on how to generate *inputs* for estimating tourism economic impact. They do not include economic impact models *per se*.

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<sup>3</sup> Kelly, Williams, Sheiven, Dunn, Journal of Travel Research, Vol. 44, No. 4, 449-456 (2006).

<sup>4</sup> Tyrrell, T.J., Williams, P., & Johnston, R.J. (2003). *How Many Visitors Were There?* Presented to the 53<sup>rd</sup> Aiest Congress. Athens, Greece.

<sup>5</sup> *On-site spending at a sporting event* by all attendees including community residents and tourists may be an appropriate information objective for sporting events that do not attract a sizeable proportion of *tourists* and/or do not have the resources to undertake a tourism economic impact assessment or for other purposes. *On-site spending* is money spent at the event site itself and for tickets to attend the event. It also includes money spent on parking, refreshments, souvenirs and other retail purchases and additional admission fees on the site. These guidelines are not appropriate for sporting events that elect only to measure on-site spending.

**a) Gated versus ungated or open access events**

A “**gated**” event is one that takes place in a confined area with “gates” or other “controlled” points of entry/exit. Estimating total attendance is comparatively straightforward at a gated event because event organizers can count tickets or entrants as they pass through controlled entry points.

An “**ungated**” or **open access event** is one that takes place in whole or in part in an open area where access is not controlled. From a measurement perspective, this type of event poses challenges because research tools are required to estimate total attendance without the benefit of “head counts” as attendees enter or exit the site.<sup>6</sup>

**b) Tourism economic impact versus on-site spending**

**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 a sporting event takes into account **incremental spending** by tourists who travel from outside the community and go to the event. Incremental spending is money that is spent at or because of the event *that would not otherwise* have been spent in the community.

It does *not* include spending associated with the event by people who live in the community (*locals*). A tourism economic impact assessment is most appropriate for sporting events that attract at least ten percent of their total attendance from *tourists* – people who do not live in area in which the event takes place. While tourism economic impact can be estimated for *ungated* sporting events, these guidelines are limited to procedures designed for **gated** ones.

**On-site spending at a sporting event** by all spectators including community residents and tourists may be an appropriate information objective for sporting events that do not attract a sizeable proportion of *tourists* and/or do not have the resources to undertake a tourism economic impact assessment or for other purposes. These guidelines are not appropriate for sporting events that elect **only** to measure on-site spending.

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<sup>6</sup> Some of the measurement challenges and options for generating inputs for estimating tourism economic impacts at *ungated* events can be found in *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Ungated or Open Access Events and Festivals*, available at Tourism British Columbia’s website (<http://www.tourismbc.com>, click on “Research” and “Resources for Researchers”).

**5. Which set of guidelines is most appropriate to meet your information needs?**

Based on the type of sporting event, select the guidelines listed below. The highlighted area is “this” document. The other document is provided under separate cover.

	Spectator Sporting Event	Participant Sporting Event
Tourism Economic Impact Estimate	<b><i>Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Gated Spectator Sporting Events (this document)</i></b>	<i>Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Participant Sporting Events (under separate cover)</i>

**6. Benefits to funding organizations**

By adopting these guidelines, sporting event sponsors can achieve a common standard for decision-making. If every event 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 spectators of different types of events will be developed which may be useful as inputs for forecasting the potential tourism economic impact of sporting events that are still in the planning stage.

**7. Benefits to spectator sporting event planners & organizers**

Sporting event planners and organizers 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 event.

**B. Basic questions you should ask**

**1. What is “tourism economic impact”?**

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

*ABC Spectator Sporting Event 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 attended ABC Spectator Sporting Event. The tourism economic impact of an event takes into account **incremental spending** by tourists who travel from outside the community and go to the event. Incremental spending is money that is spent at or because of the event *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 event or activity. If the same money that is spent at or as a result of an event would have been spent in the community on other activities, goods or services, the event is not deemed to be responsible for the spending. In other words, some of the spending that takes place at an event is *not* incremental – it would have happened anyway.

For example, while visiting your community, Dave and Diane decide to go to your event instead of going to a movie at the local theatre. Suppose that the ticket price for your event and the movie are the same. In this case, the purchase of tickets for your event 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 event or the movie) – whether your event took place or not<sup>7</sup>.

## 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*.

The economic impact of tourists' activities in a community is also different from how much all attendees spent *at the event*. If you want to measure how much money residents of your community and tourists spent at your event, other tools are available to help you.<sup>8</sup>

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<sup>7</sup> 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.

<sup>8</sup> See Guidelines: Survey Procedures for Assessment of On-Site Spending at Gated Events and Festivals available at Tourism British Columbia's website (<http://www.tourismbc.com>, click on "Research" and "Resources for Researchers").

#### 4. Are there other ways to measure the success of a spectator sporting event?

Yes. There are many ways to evaluate the “success” of a spectator sporting event. A tourism economic impact estimate is only one. For example, an event organizer might wish to estimate total on-site spending by all spectators including community residents and tourists. One may also wish to estimate *non-monetary* impacts on the community such as the value of maintaining community pride, physical fitness, and the like.

Cost-benefit analyses are also used to estimate the impact of sporting events on communities. Determining the balance between non-monetary *benefits* such as social peace and social links and non-monetary *costs* such as hooliganism and doping that may be associated with sporting events is an important and complex process.<sup>9</sup>

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 that tourists who attend an event bring to a community, province or country.

#### 5. Should every sporting event measure tourism economic impact?

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

- (1) If the event 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 event are in the community for a reason ***other than attending the event*** (the economic impact associated with the event is linked to how important it was in the decision to visit the community -- see Section II-B-6 for more details).

#### 6. Why would a sporting event 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 event, you might want to estimate the event’s *tourism* economic impact. In other words, a tourism economic impact estimate quantifies the *incremental impacts* brought to a community because the event attracted these tourists.

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<sup>9</sup>Barget, Gouguet, *The Total Economic Value of Sporting Events - Theory and Practice*, Journal of Sports Economics, Vol. 8, No. 2, 165-182 (2007).

Estimates of the contribution your event 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. Check with sponsors and partners before deciding what to measure!**

Some event sponsors are especially interested in the *tourism* impacts of events whereas others are interested in other measures, such as on-site spending. Make sure that the estimates you produce will meet the needs of potential event sponsors before you design and implement a measurement plan.

**8. What steps does an event organizer have to take to estimate tourism economic impact?**

See the description on pages 28 through 32 and Figures 1 (page 30) and 2 (page 32) for the various steps required to generate inputs for a tourism economic impact estimate.

**9. 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 or local level.

**10. 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.

**11. 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 sponsors and/or partners (if any), and members of research professional organizations such as the Travel and Tourism Research Association (TTRA, [www.ttra.com](http://www.ttra.com)), Marketing Research and Intelligence Association (MRIA, [www.mria-arim.ca](http://www.mria-arim.ca)) or Marketing Research Association (U.S.A.) (MRA, [www.mra-net.org](http://www.mra-net.org)). These organizations maintain lists of members who may be able to meet your needs.

## 12. What do you need to estimate your event's tourism economic impact?

### **a) Money**

The guidelines recommend the collection of information directly from sporting event spectators and directly or indirectly from participants (athletes and their support staff such as coaches, referees, judges, etc.) and representatives of the media (including crews) that have come to a community specifically to cover the sporting event. Surveys are required for capturing the necessary information 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 event 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 or regional economic development office or other organization has a model available for you to use. Contact the British Columbia Ministry of Sport, Tourism and Recreation or your local economic development office to determine availability of a model for your area.

**d) A medium-term research plan (for repeat events)**

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.

**e) The impact area**

At what level of geography do you plan to estimate the tourism economic impact of your event (i.e., national, 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, 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 event'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.

**f) Local partners**

Perhaps your event can't "go it alone", but if you worked with other events 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 event is unlikely to attract at least ten percent (10%) of its spectators from outside the local area, you should probably *not* undertake a tourism economic impact assessment. Unless your event 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 events can manage.



**h) A reality check**

Not every event will have budget, human resources, and/or access to a suitable tourism economic impact model. Be prepared to conclude that your event cannot support the effort required to generate inputs for assessing tourism economic impacts that meet *minimum standards*.

## II. DESIGNING A TOURISM ECONOMIC IMPACT STUDY

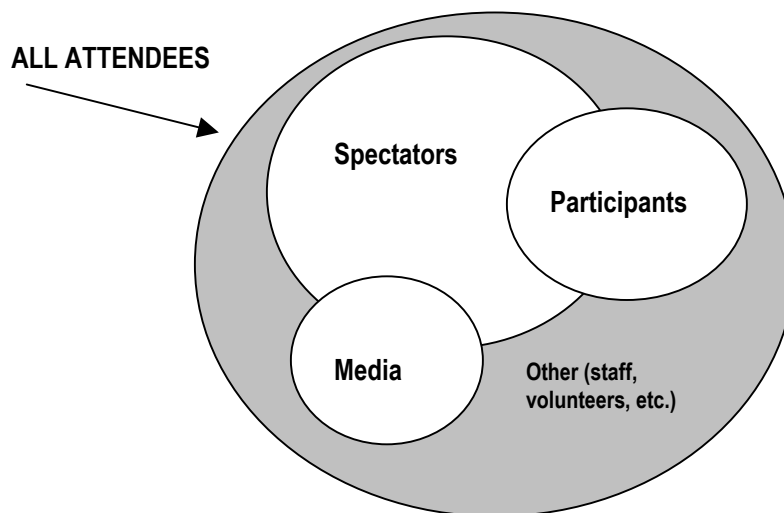
### A. Different Procedures for Different Groups

#### 1. Different Types of Attendees: Spectators, Participants, Media Representatives

An **attendee** is defined to be all the people who attend the event. **Tourist attendees** are those who have come from out-of-town to attend the event (see definition of *tourist* in Section II-B-6). In turn, tourist attendees can be divided into three groups: **spectators**, **participants** (athletes and associated staff and officials such as referees and judges), and **media** representatives including crews.

Different survey procedures are recommended for these different types of tourists because they will have come to your community for different reasons and may have very different spending patterns. For example, **athletes/staff** and **officials** (referees, judges) may come in advance of the event to train under local conditions; they may be billeted with local residents or in dormitories rather than relying on commercial lodging in the community (e.g., hotels, motels) and so on. They may or may not attend your event as *spectators*. Some, for example, may only perform in their portion of the event and then leave the community.

Similarly, **media representatives** and their crews may arrive in advance of the event to provide local background and colour, to interview athletes, observe training, and so on. They may remain in the community for varying lengths of time, depending on whether they are covering only specific teams or athletes, etc.



#### 2. Spectators

A **spectator** is a subset of all attendees. The spectator is a person who attends the sporting event for recreational and enjoyment purposes. He or she may *also* be an athlete who is

participating in the sporting event or a member of an athlete's staff (coaches, trainers, physicians, etc.), an official such as a referee or judge or a media representative. When "watching" the event, however, this person is deemed to be doing so as a **spectator**.

The procedures in the main body of these guidelines are designed for estimating the characteristics and spending in the community by spectators. As described below, you can treat participants and media representatives as *spectators* or you can undertake stand-alone studies for each of these special groups of attendees. Separate procedures are provided in these guidelines for estimating the characteristics and spending in the community by out-of-town participants and media representatives (See Appendix VII).

If you elect to estimate tourism spending separately for participants and/or media representatives, you will need to adjust the spectator study to take into account potential *duplication* so you only include spending for an individual one time, even if he/she attends the event as a *spectator* and is also a *participant* or *media representative*. Procedures for adjusting tourism spending by spectators to exclude the portion attributed to participants and/or media representatives are described in Appendix VII.

### **3. Participants (Athletes, Associated Staff, Officials, etc.)**

Athletes and members of their staff such as coaches, trainers, and physicians; and officials such as judges and referees are considered to be *participants* in the event. They can be surveyed separately or included as "spectators" if you anticipate that most of them will attend portions of the event as a spectator. If many or most of the out-of-town athletes and their associated staff are *not* expected to be spectators, it is recommended that information to identify their tourism spending associated with the event be collected from event organizers. For more information on options to include out-of-town participant spending in estimates of the tourism economic impact of the event, see Appendix VII.

### **4. Media Representatives (Media)**

Separate procedures are also provided in these guidelines for estimating the characteristics and spending in the community by non-local media representatives including crews, whether freelance or on staff of media organizations, sent to the community in order to cover the event. Like athletes, media representatives can be included in a spectator study if it is assumed that they will attend portions of the event as spectators. If not, it is recommended that information to identify their tourism spending associated with the event be collected from event organizers. For more information on options to include out-of-town media representatives' spending in estimates of the tourism economic impact of the event, see Appendix VII.

## **B. Important concepts**

### **1. Event type**

If the event takes place in a confined area with “gates” or other “controlled” points of entry/exit, follow the guidelines for a **Gated Event**.

If the event takes place in whole or in part in an open area where access is not controlled, refer to the *Guidelines: Survey Procedures for Tourism Economic Impact Assessments of **Ungated** or Open Access Events and Festivals* for a description of measurement challenges and options for generating inputs for estimating tourism economic impacts.<sup>10</sup> While many of the steps in the Guidelines are the same for *Gated* and *Ungated* events, there are some fundamental differences in sampling and projection procedures that must be taken into account, depending on the event type.

*Sampling procedures* refer to the methods you will use to identify the subset of attendees and/or tourists that will be interviewed at your event. *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 event.

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

You will need to know how many *locals* and how many *tourists* came to your event. Local residents may represent the majority of event 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 event attendees as they enter the site 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.

### **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. 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

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<sup>10</sup> Available at Tourism British Columbia’s website (<http://www.tourismbc.com>, click on “Research” and “Resources for Researchers”).

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 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.<sup>11</sup> The trip must be completed within 365 days.

#### 4. Who are your tourists?

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, you would consider residents of the province who live outside the particular community in which the event is held to be *tourists*. Only residents of the particular community who attended the event 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 spectators have spent the “same” money elsewhere in the community if your event had not taken place? Remember, a tourism economic impact assessment measures the impact of *incremental spending* associated with an event. This is spending that would not have taken place if your event had not been held. For example, if Dave and Diane decided to go to the sporting event instead of going to a movie at the theatre and the ticket prices for your event and the movie were the same, your event 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 event took place or not (*substitution effects*)<sup>12</sup>.

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<sup>11</sup> Some other minor exclusions apply.

<sup>12</sup> 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 the event 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 event on the economy. A survey is required to find out what Dave and Diane would have done if your event had *not* occurred.

Generally, substitution effects are associated with *spectators* rather than with *participants* or *media representatives* because the latter groups are unlikely to *substitute* a different event from the one they have come to participate in or cover.

#### 6. The importance of your event in the tourist’s *destination choice* (“Casuals”)

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

The concept of “casuals” is associated with *spectators* rather than with *participants* or *media representatives* because participants and/or media representatives are likely to have come to your community at the time of your event solely because the event is taking place.

#### 7. “Time switchers”

Did your tourist replace a future trip with one that coincides with your event? If a tourist was planning to come to your community at a later time but changed his or her travel plans *because* of your event, only a portion of the tourist’s spending in the community would be *incremental* because some portion of this tourist’s spending would have taken place in the community at a later date.

The time span used to estimate “replacement trips” varies from study to study. Some experts suggest using a three-month period whereas others rely on a twelve-month period. These guidelines adopt the three-month limit but event organizers will determine, in consultation with partners and funders, what time span for “time switchers” is most appropriate for their analysis purposes, event and community.

*Participants* or *media representatives* are not considered to be *time switchers* because their presence in the community at the time of the event is assumed to be a direct result of the event taking place.

### **C. Participants and media representatives**

#### **1. Deciding how to measure tourism spending by participants and media**

These guidelines provide four ways to design your study to take into account the tourism economic activity of spectators, participants and media.

- 1. Calculate average spending for participants/media representatives from Spectator Study and apply to all participants/media representatives.** This approach entails applying special calculations to information collected in a spectator study as described in the following chapter, combined with estimates provided by event organizers of the number of out-of-town participants and/or media representatives at the event.
- 2. Gather information from event organizers in a systematic manner.** By providing event organizers with a form to provide information on participants and media representatives, you can obtain estimates of tourism spending by these individuals. If you elect to use this approach, spending that may have been reported for these individuals in a spectator study must be excluded from final estimates of tourism spending so as not to count the same spending more than once.
- 3. Conduct stand-alone studies of athletes and associated staff/officials, and media representatives.** If you design stand-alone studies for these types of people, spending that may have been reported for these individuals in a spectator study must be excluded from final estimates of tourism spending so as not to count the same spending more than once. Because of its complexity, potential for low cooperation rates and demands on the resources of study organizers, this approach is not recommended for most spectator sporting events.
- 4. Treat everyone as a spectator.** You can make the assumption that athletes and members of their staff such as coaches, trainers, and physicians and officials such as judges and referees; and media representatives will *also* be spectators at some time during the course of the event. As you conduct your **spectator** study, these individuals would be included among qualifying respondents and treated in the same manner as all other spectators.

Summaries of options 1, 2 and 3 are provided below and described in greater detail in Appendix VII.

## **2. Summary of options for estimating participants' and media representatives' tourism spending**

### **Option 1: Average spending based on spectators' spending**

The simplest approach to estimating tourism spending by participants and media representatives involves obtaining a count of all such individuals at the event who live outside the local community. Using average spending estimates derived from the *Spectator Study*, you would calculate the approximate amount of money participants and/or media representatives would spend in the community. After adjusting for potential duplication of these individuals in your spectator sample, you would add the calculated spending for participants and media representatives to the adjusted estimates of spectators' tourism spending associated with the event (*incremental spending*) from the spectator study.

(Optional) For additional precision in the estimates, information from event organizers could include the number of days participants/media representatives spent in the community for the event. In turn, averages would be calculated on a per-person-per-day basis and applied to the total number of days (nights) the target groups were in the community. The same procedures would be applied to tourism spending estimates for "other parts of the province".

### **Option 2: Spending estimates provided by event organizers**

A somewhat more complex approach is to provide Event Organizers with a set of forms to complete. These forms would include questions about the number and place of residence of participants and/or media representatives, types of accommodation used by length of stay in the community and other parts of the province, fees associated with attending the event and other details about spending in the community/other parts of the province. Based on the information provided by Event Organizers, you would calculate tourism spending associated with the event for participants and/or media representatives and add these estimates to those derived from the *Spectator Study*, adjusting for duplication as required.

### **Option 3: Stand-alone studies of participants/media representatives**

The most complex approach is to design a stand-alone study for participants and/or media representatives. This approach entails developing a customized questionnaire and sampling plan to obtain details about participants/media representatives who are tourists, their trip and stay in the local community. The sampling unit for these stand-alone studies can be key contacts for the participants/media representatives (e.g., coaches, managers, media organizations) or individual participants or media representatives at the event. In either case, you will likely require the cooperation of event organizers to provide you with the information you require to build the sampling frame for these stand-alone studies (e.g., lists of contact people and/or individuals) and access to them.



In turn, “access” might be in-person on the site of the event or as a follow-up study once the event is over. In the latter case, you would require mailing addresses, email addresses and/or telephone numbers to reach participants/media representatives once they have left the community.

### 3. How to decide which option is best

When selecting the optimal method for including estimates of tourism spending associated with the event for participants and media representatives, you might take into account the following factors:

**a) How cooperative will event organizers be in providing you with the necessary information to conduct stand-alone studies?**

If you do not anticipate full cooperation from event organizers in provision of the “counts”, contact and/or sampling information you would require to conduct stand-alone assessments of tourism spending by participants or media representatives, you would be advised to include these types of attendees in your **Spectator Study**. In turn, you would make the assumption that those who *do* attend the event both as participants (or media representatives) and spectators are sufficiently similar to *all* participants (or media representatives) that the ones you capture in the spectator study can “stand for” all participants (or media representatives). If you opt for this approach, you would document these assumptions when you report your results.

**b) Will you be provided with access to all types of participants/ media representatives so your survey will be an accurate reflection of the full universe under study?**

Full access to the groups under study, whether on-site for intercept interviews or distribution of self-completed questionnaires, or for follow-up information collection (mail, email, or telephone surveys) is very important. If you obtain access to only some participants or media representatives (e.g., only those who participate in particular portions of the event or live in a particular country), you will be unable to estimate tourism spending for the *full universe*. In this case, it is advised that you *not* attempt stand-alone studies of participants and/or media representatives.

**c) How cooperative will participants/ media representatives or key contact personnel be in providing you with the information you require?**

Depending on the nature of the event, you may find that participants and/or media representatives are unwilling or unable to provide you with the information you require. Their lack of cooperation may be influenced by the number of demands on their time, on language barriers, and a host of other reasons. For international events, provision of study materials in multiple languages may be required to increase cooperation rates. In turn, this type of requirement may exceed the resources you can devote to the process.

You should also expect lower cooperation rates among participants and media representatives at sporting events than among spectators.<sup>13</sup> Assuming a cooperation rate of 25% to 30% for these groups, you will need to determine whether the extra effort to conduct stand-alone surveys is worthwhile. You may, for example, derive equally accurate (or inaccurate) estimates of tourism spending by including participants/media representatives in the Spectator Study as you would have if you achieve a low response rate in your stand-alone studies.

**d) How “accurate” is accurate enough for estimates of participants’ and media representatives’ tourism spending in the final estimate of tourism economic impact of the event?**

As noted elsewhere in these guidelines, there is no requirement to include spending by participants or media personnel in your final estimates of tourism spending. You can restrict your study to *spectators* or include only those participants and media representatives who are also spectators in your final estimates. If you were to adopt one of these approaches, you would indicate that your estimate of tourism economic impact in the community and/or province should be considered “conservative” because it does not include spending by *all* out-of-town athletes/associated staff, media representatives and the like.

The additional precision in the estimates that might accrue from undertaking stand-alone studies is impossible to estimate in the “abstract”. It will depend on the nature of the sporting event. An event with hundreds of athletes coming to a community from out-of-town will generate a very different level of tourism spending by participants than would an event in which most participants are local residents. Similarly, an event in which most out-of-town participants are billeted in private homes will produce lower tourism economic impact estimates than one in which most stay in hotels or motels.

**e) How many resources do you have to devote to collection of this information?**

Those responsible for designing the tourism economic impact study for a spectator sporting event will have to undertake their own *cost-benefit* analysis to determine whether separate estimates of tourism spending by participants and/or media representatives are worthwhile. This assessment will take into account the resources available and the costs associated with undertaking such studies.

**f) Referencing other sources of information**

Regardless of the approach you adopt for estimating tourism spending by participants and/or media representatives, it is advised that you conduct some form of “reality check” prior to finalizing spending estimates for these individuals. You might, for example compare the average per-person-per-day spending estimate you derive from the Spectator Study on an origin basis

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<sup>13</sup> Experience suggests that cooperation with surveys among participants and media at sporting events is less widespread than is the case for spectators. For this reason, the estimated response rate of 25% to 30% is appreciably lower than the 50% you might expect to achieve for the *spectator study*. Also note that response rate estimates used throughout these Guidelines are examples only. They will vary based on the particulars of an event and the type(s) of attendees, participants and/or media representatives it attracts. Study organizers will have to use their experience and judgement to estimate likely response rates but should recognize that they could be lower than those used in these Guidelines.

(i.e., matching place of residence of spectators and participants) to see if they are of similar orders of magnitude. You might also compare your results to annual surveys conducted by Statistics Canada that provide estimates of per diem spending by visitors from various origins to Canadian destinations.<sup>14</sup>

#### 4. Some pros and cons of conducting only a *spectator study* (Option 4)

**The benefit** of treating participants and media representatives as part of your spectator study is simplicity. You need not undertake additional procedures to obtain separate estimates of spending by non-local representatives of these groups.

The **liability** is that you are likely to encounter too few of these special groups in your general *spectator* study to generate a reliable estimate of non-local participant or media spending in the community. Since the spending patterns of these individuals are generally different from a *typical tourist* who comes to your community, the quality of your estimates may be impacted.

It may also be the case that sizeable portions of the participant and/or media groups will *not* attend the event as spectators. If you undertake a spectator study only, you will miss these visitors' contributions to the local economy.

#### 5. Where to find the tools you need for the type of study you select

Procedures described in the following chapters of these guidelines are designed to help you undertake a study of **spectators** which may or may not include participants and media, depending on how you elect to include these attendees in your study.

If you elect to estimate tourism spending by **participants (athletes, officials, etc.)** or **media representatives** separately, procedures for doing so and methods for incorporating these estimates into a *final* estimate of tourism spending associated with your event are described in Appendix VII.

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<sup>14</sup> International Travel Survey for U.S. and Overseas visitors and Travel Survey of Residents of Canada for domestic visitors.

### III. AN OVERVIEW OF THE SPECTATOR SURVEY PROCESS

#### ***Four components to a tourism economic impact study of spectators***

Four components are required to produce inputs for an estimate of the tourism economic impact of your event (see Figure 1 on page 30):

1. A systematic approach to obtain **Attendee Counts** to estimate total attendance;
2. **Attendee Tallies** to identify the proportions of spectators from various places of residence;
3. An **Spectator Survey for Tourists** to capture spending and other characteristics of spectators; and
4. An **analysis plan** to identify which spending accrues to the event and which does not and to weight and project sampled spectators to all spectators.

#### **1. Counting & tallying attendees**

Details regarding how to count and tally attendees at various types of events are provided in Section IV-B/C. Sample Tally materials are provided in Appendix V.

#### **2. Spectator survey**

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

**Recommended:** A **spectator survey** to capture characteristics and spending information from your event's spectators (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 a Spectator Survey, but this approach is not recommended.

We recommend that **primary estimates** (using a spectator 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 event in the destination choice, trip replacement, etc.
- Additional information useful for event planning 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 Spectator 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 Spectator Survey are provided in Section III. Sample spectator questionnaires are provided in Appendix VI. Information about stand-alone Participant and Media Representative studies is also contained in this appendix.

### 3. Analysis plan

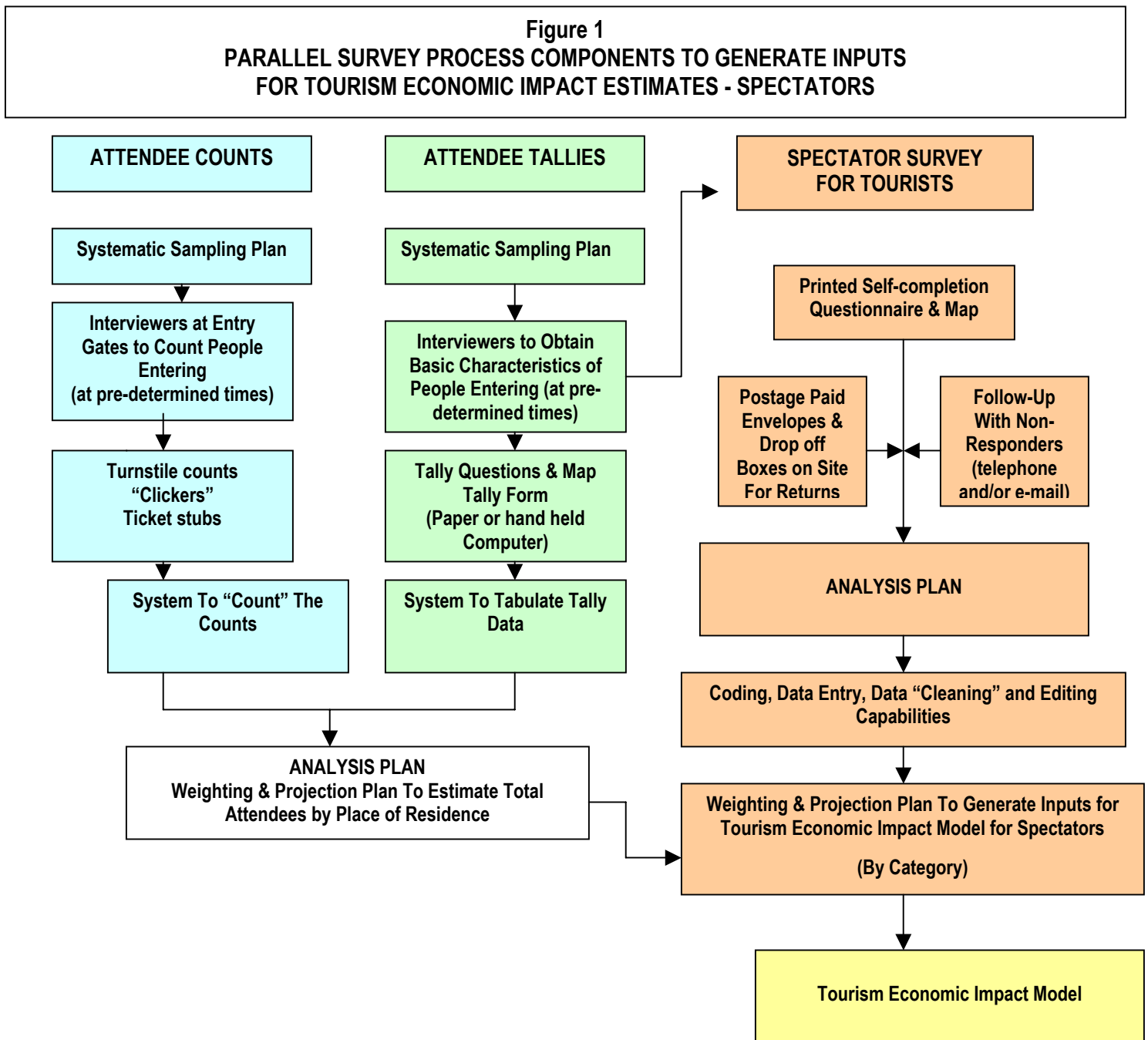
The analysis and tabulation plan provides guidance for determining how to adjust spending estimates to reflect the *incremental* spending generated by your event, and how to weight and project this estimate to all tourists who visited your event. Details about how to construct an Analysis Plan are provided in Section VII. A schematic diagram is provided in Figure 2 (page 32). 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).

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

1. Role of event 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 event (*incremental*) and how much would have been spent whether your event took place 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 event community; elsewhere in the province or state, etc.) (“**C**”).

Using information that tourists provided in their completed Spectator 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 Spectator Survey. They now must be projected to “Total Tourists”, using the estimate you obtained from the count and tally processes (“**D**”).

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



After you have weighted and projected tourist spending that took place *because of your event* (incremental) from surveys to *all* tourists, you are ready to input spending estimates, category-by-category, into the tourism economic impact model you are using (“E”). Note that this estimate will represent spending by tourists who are **spectators** only.

If you have also measured spending by **participants** (athletes, their staff) and **media** representatives who are tourists in your community in separate studies, you would follow the adjustment procedures described in Appendix VII .

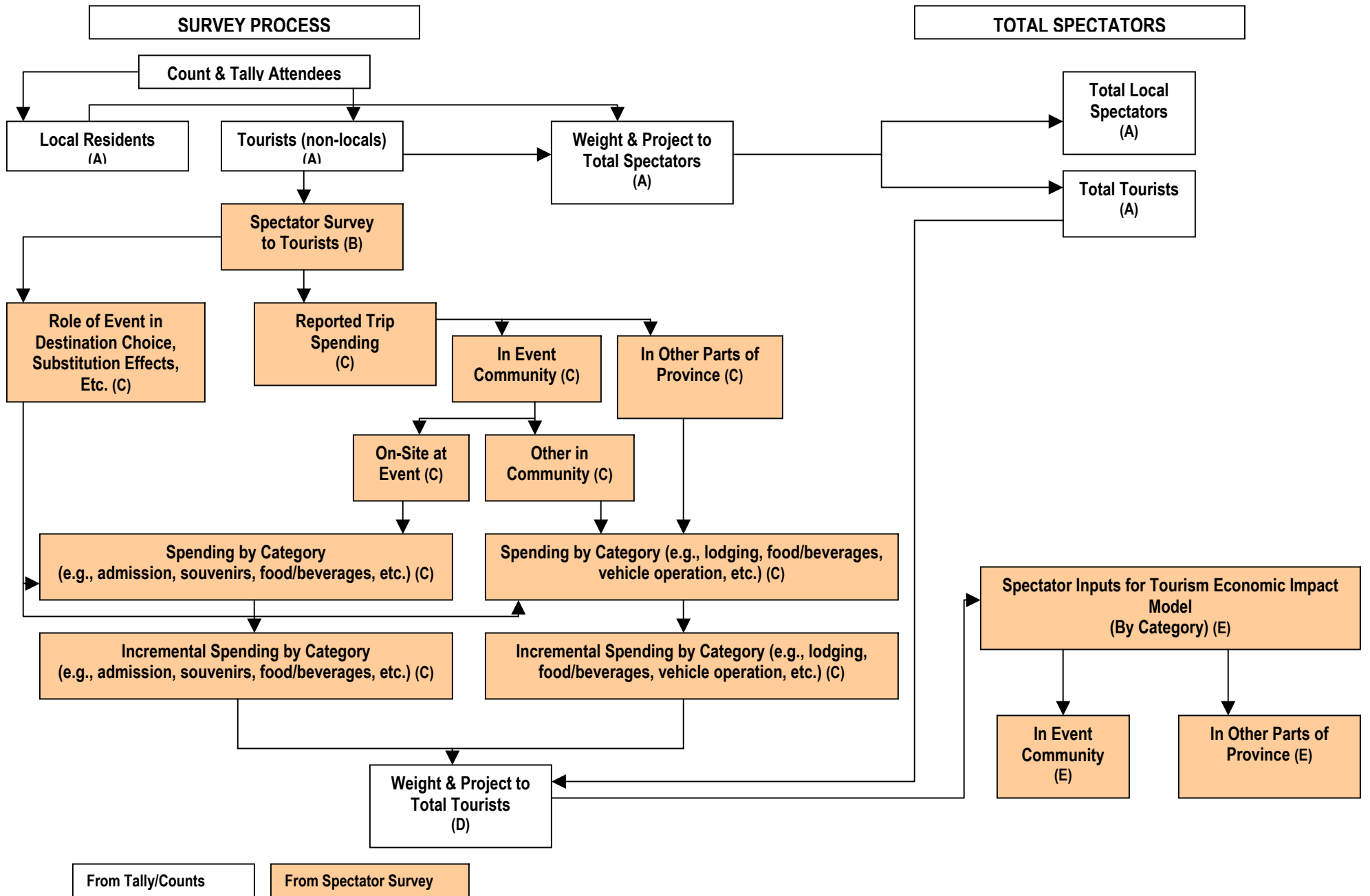
#### 4. Documenting the study process

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 XI of these Guidelines provides information on this important documentation tool.

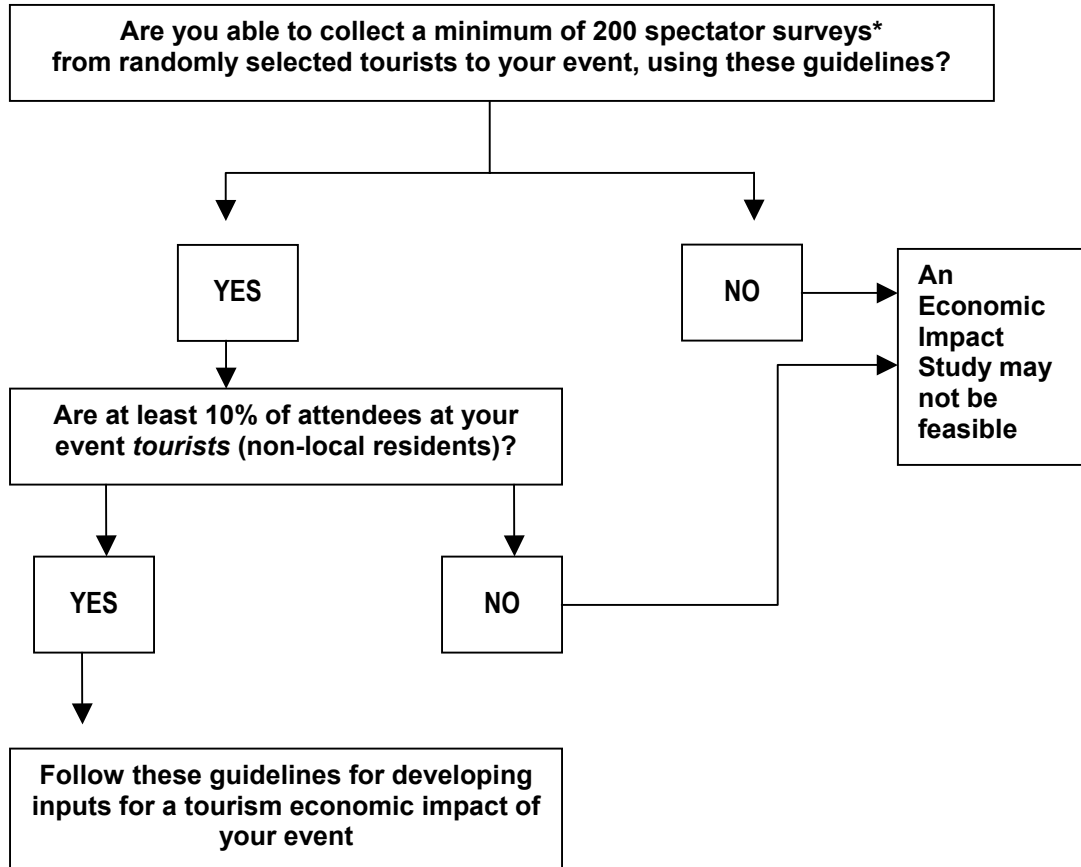
**Figure 2**  
**SURVEY PROCESS TO OBTAIN SPECTATOR INPUTS FOR A TOURISM ECONOMIC IMPACT MODEL**





## 5. 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



\*See Section IV-B.10 for a discussion of survey sample size minimums.



## IV. THE SPECTATOR SURVEY PROCESS

### A. Essential measurement tasks

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

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 event accurately.

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

**Telephone or e-mail follow-up** with respondents who accepted an Spectator 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.

Refer to Figure 1 for a picture of the process (see page 30).

### B. Counting & tallying spectators at a gated event: 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 event. The stint will form the basis for *sampling* attendees who come to your event (e.g., 9:00 am to 11:00 am).

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

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

**Tally Interview:** Short interview to obtain basic information about which attendees are locals, tourists, and those who should be excluded from the survey process (staff, volunteers, etc. and participants/media representatives if these latter groups are being surveyed separately)

**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 event.

**Final Ticket Adjustment Weight:** Adjustment to match the *total number of ticketed attendees* who came to the event 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 event, you need a sampling plan based on the particular characteristics of your site and event. 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., 9:00 am to 11:00 am) on a particular day of the event (e.g., Day 1) at a particular entry point (e.g., Gate 1) or other location on the site for data collection.

## 5. Attendee counts

Because different types of attendees may come to the event at different times of day, on different days of a multi-day event, and/or through different gates, 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 event 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/gates 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 “gate” or 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 event (even if you do not sell tickets to the event).

No matter which approach you take to counting people who enter your event, 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 all the people who come to your event about their place of residence, their household party size, and how much they spent at your event and in your community. At the same time, you need a way to estimate this type of information for *all* your spectators.

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 event 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 merchants, staff, volunteers, and depending on whether they are being surveyed separately, participants and media.

## 7. Recruitment for the spectator survey

We recommend that you “recruit” respondents for the Spectator 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 *n*<sup>th</sup> local resident to complete the survey (e.g., every 10<sup>th</sup>) but would ask *every* out-of-town spectator you tally to complete the survey.

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

## 8. Different events require different approaches to stint samples

### a) *Event characteristics*

The complexity and duration of your event, 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 Spectator Survey recruitment.

For example, different sampling plans will be required for different types of events:

- A single day event and everyone enters at the same time (e.g., a performance with a set start time);
- A multi-day event in which all spectators come for the full duration of the event, starting on Day 1;
- A multi-day event in which different spectators may arrive at any time over the course of the event (Day 1, Day 2, etc.).

Different plans will also be required depending on how many points of entry the site has (gates) and whether you have reason to expect that different *types* of attendees will enter through different gates.

For example, if one gate is near a bus stop but far from the parking lot and another gate is near the parking lot but far from a bus stop, different types of attendees may enter at each gate. Those who rely on public transport may differ in a variety of ways from those who drive a private vehicle and you need to make sure you have included both groups in your counts and visitor tallies in their correct proportions.

### b) *What you are trying to measure*

The numbers of tally/recruitment interviewers you require will also depend on what information you are attempting to measure. If you are interested in capturing information to allow you to generate inputs for a *tourism economic impact model*, you will likely need more interviewers than if you are interested only in the amount of money that was spent on-site by all spectators (locals and tourists).

Why? Because tourists are likely to represent a much smaller proportion of your total attendance and will, therefore, be harder to find, than locals. Tourists are the proverbial *needles in the haystack*. And you have to find a sizeable number of *needles* (tourists) for your economic impact estimates to be reliable.

## 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 *after* the event is over. 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 Spectator 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** spectator parties in each of the spectator groups you plan to study. Of course, you can conduct more Spectator 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 spectators that visited your community because of your event. You can't ask all spectators so you will estimate the percentage by asking a random sample of spectators 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 spectators 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 spectators who visited your community because of your event. 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* spectators, or *tourists*. You can treat *all* non-local spectators as a “group”, conducting 200 interviews with them or you can divide your tourists into “segments” and attempt to reach the 200 minimum 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 as your event versus those who live outside your province.

**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 or country versus tourists (non-locals) who live outside the community but in your own province.

**d) Target number of tally interviews to complete**

Determining how many completed tally interviews you require will depend on how many completed Spectator Surveys you hope to obtain, assuming you will be recruiting household parties to complete the Spectator 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 spectators is likely to live outside the local area?** Unless you have conducted visitor studies at the same event in the past and have information on the proportion of spectators 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 spectators to attend your event?** Each event 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 Spectator Surveys with tourists.

Generally, the more Spectator 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 event is able to devote to the study.

**e) Estimating how many spectator 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 event, X% was generated by in-province non-locals, Y% was generated by people from other provinces, and Z% was generated by spectators from outside the country, you will require enough Spectator Surveys from each of these groups to produce reliable estimates for *each*.



We recommend a minimum of 200 completed Spectator Surveys for each group you plan to analyze as a separate entity. In this scenario, you would require approximately 600 completed Spectator Surveys with *tourists* and, if you elect to do so, an additional 200 Spectator Surveys with local residents. Locals are included to provide on-site spending and other information about their experiences at the event. Their on-site spending is *not* included as an input to a tourism economic impact model.

Locals*	In-province non-locals	Other provinces	Outside the country	Total Completed Spectator 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 spectators, you will require fewer Spectator Surveys. In this scenario, you would require approximately 200 completed Spectator Surveys with *tourists* and, if you elect to do so, an additional 200 Spectator 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 Spectator Surveys
200	200	400
*optional		

**f) What if you are only interested in on-site spending at your event?**

If you are only interested in providing information on On-Site spending by *all* spectators at your event (and are not interested in providing information on the economic impact of tourists at the event), refer to the procedures described in *Guidelines: Survey Procedures for Assessment of On-Site Spending at Gated Events and Festivals* available at Tourism British Columbia’s website (<http://www.tourismbc.com>, click on “Research” and “Resources for Researchers”).

**g) What if you do not know how many people will likely attend your event?**

If you cannot *estimate* total attendance at your event and/or what proportion of your spectators are likely to be *tourists*, how can you reach the recommended minimum number of completed Spectator Surveys?

Since the *stint* is the sampling unit, you would assign sufficient stints to tally and recruit spectators, assuming a constant flow of entrants through the gates. Depending on the draw of the event 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 spectator 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 non-locals, other domestic tourists and foreign tourists) and determine which segments meet the 200 minimum completions to support analysis.

**h) 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 event;
- you may have assigned too few stints to capture enough tourists;
- even if you have had previous experience to suggest that your event 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 event.

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 spectators**

**a) How many “stints” do you need?**

The number of “count” and “tally” stints you require will depend on the complexity of your event, on the flow of traffic into your event and on the number of target tallies you hope to achieve. When developing your sample, consider the following factors:

- duration of the event;
- the number of gates;

- whether people tend to “flood in” all at once at certain times of day or at certain gates or “trickle in” at a slow but steady rate over many hours;
- 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 IV-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 event 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 gate 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 event (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 spectators, 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 IV-C for more details about sampling methods).

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

If your event is one in which *everyone* arrives at the same time, you may need to augment your “stint” sample at entry points (gates) with additional tally stints on-site. If almost all of your attendees arrive at the same time, there may be no way to keep the crowds flowing through the gates AND conduct sufficient tally interviews to have viable estimates of different visitor types. Recommendations for handling this situation are provided in the Concentrated Entry Events section (Section V-B-1-c).

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

As long as you have covered all the time periods and locations at which people can enter your event 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 event.

**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). 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 the expected entry patterns of your event, 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 event 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. If, for example, you want to spread interviewers out over multiple locations, you might set stint duration for three hours. A single interviewer could cover two stints (at two different locations) over a six-hour period. As a general rule, the shorter the stint duration, the more *coverage* you will obtain at different locations 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, entry gates will not be a realistic location for capturing sufficient tally information. In this case, additional tally time blocks and locations would be required on the site itself. Recommendations for handling this situation are provided in the **Concentrated Entry Events** section (Section V-B-1-c).

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

Remember, you have to work *backwards* to identify how many tally interviewer stints you will require to meet your *Spectator Survey* targets. In turn, the Spectator Survey targets will depend on how many *non-local* spectators you expect to attend your event 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 spectators at your event) 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 spectators.

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

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

In order to obtain 200 Spectator 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 Spectator Survey and that 50% of those who agree to do so actually complete the Spectator 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 Spectator 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 spectator surveys with each group. In fact, you would likely find more than you need.

	Expected Percentage	Tally	Recruited for Spectator Survey @ 85% Acceptance Rate	Completed Spectator Survey @ 50% Response Rate
Foreign Countries	5%	471	400	200
Other Domestic	10%	941	800	400
Same Province (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 event to event. Those shown here are examples only.

#### 14. Sampling tallied household parties for spectator surveys

As shown in the accompanying table, to find enough **foreign** spectators to achieve 200 completed Spectator 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 as the event (assuming a 15% incidence), and 941 attendees who live in other provinces (assuming a 10% incidence).

You can either recruit all the household parties you tally in all groups to complete your Spectator Survey or you can *sample* them at a pre-set rate. If you recruit *everyone* for the Spectator 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 Spectator Surveys with *locals* -- more completed Spectator 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 Spectator Surveys but do not get overwhelmed by the volume of surveys to process and analyze.

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

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

#### 15. What if your event does not attract enough *tourists* to achieve 200 spectator surveys?

If your event 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 event attracted 150 tourists and you obtained completed Spectator Surveys from at least half of them (75), your estimate of tourism spending associated with your event 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 event, a sample of only 75 would not necessarily produce stable estimates. To achieve 75 completed spectator surveys from *tourists* at this hypothetical event, 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).<sup>15</sup>

If you have a small event and/or expect that low proportions of your spectators 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 spectators 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 Spectator 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 Spectator Surveys with a cross section of spectators (all places of origin, as they fall in your event’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 Spectator Surveys per Interviewer Stint *	Completed Spectator Surveys per Interviewer Stint **	Number of Interviewer Stints Required to Reach 400 Completed Spectator Surveys
5	10	50	42.5	21.25	$(400 \div 21.25) = 18.8$
*Assuming 85% acceptance rate. **Assuming 50% completion rate among acceptors. Note: Acceptance and response rates may vary from event to event. Those shown here are examples only.					

At a sample size of 400 spectators 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 event 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.

<sup>15</sup> *Statistics, A New Approach*, Wallis, A.W., Roberts, H.V., The Free Press, Glencoe, Illinois, 1956, p. 123.

## **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 spectators over the course of the event.

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 events will not have the volunteers or funds to hire enough interviewers to cover all entry locations and entry times throughout the course of the event, 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 event. You would customize it to correspond to the particulars of your event.

#### **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 spectator survey completions.

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

- 2 gates or tally zones
- 2 time blocks (10:00 am to 2:30 pm; 2:30 pm to 7:00 pm)
- 4 days duration



In this example, you would have 16 possible stints, calculated as follows:

$$[2 \text{ Zones} * 2 \text{ Time Blocks/Day} * 4 \text{ Days} = 16]$$

The number of *interviewer stints* you would require will depend on how many completed *spectator 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 spectators; out-of-province spectators, etc.*) keeping in mind the recommendation for 200 completed spectator surveys for each segment you plan to analyze separately (see Section IV, 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 event);
3. Identify a realistic *acceptance rate* and *response rate* for the spectator survey (how many of the tallied households will *accept* the spectator survey and of these, how many will actually *complete* and return the survey form)<sup>16</sup>;
4. Take into account that an interviewer can work effectively for no more than about five hours at a stretch.

The table on the following page provides an example of how you would go about these calculations.

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<sup>16</sup> Acceptance and response rates used throughout these Guidelines are examples only. They will vary based on the particulars of an event and the type(s) of attendees it attracts. For example, teenagers may be less cooperative with a survey process than are older attendees. Event organizers 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 <i>All Spectators</i> (Cross Section)	Target = 200 Completions with <i>Out-of-Province</i> Spectators (5% incidence)	Target = 200 Completions with <i>All Tourists</i> (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 Spectator 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 event to event. Those shown here are examples only.			

If you wanted to complete 400 Spectator Surveys with *all* spectators (cross-section – see Glossary), you would require about 21 interviewer stints. If, however, you wanted to complete 200 Spectator Surveys with *Out of Province Tourists*, you would require over 200 interviewer stints. If you wanted to complete 200 Spectator Surveys with *All Tourists*, you would require about 52 interviewer stints.

Many events will not have the resources to obtain enough completed Spectator 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 tourists at an expected rate of 5% to *all tourists* at an expected rate of 20%). Alternatively, an On-Site Spending Study could be considered.<sup>17</sup>

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 (these procedures and staff requirements differ from approach to approach).

<sup>17</sup> For more information about *on-site spending studies*, see additional *Guidelines* posted on Tourism British Columbia's website (<http://www.tourismbc.com>, click on "Research" and "Resources for Researchers").

## 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 event but you must ensure that all possible time slots and locations over the duration of your event 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 four interviewers for the tally process and wish to achieve a target of 400 completed **spectator surveys** with *all spectators*.

In this scenario, you would require about **five stints** to achieve your target (21 interviewer stints divided by four interviewers on each team).

### 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 event (*all days*);
2. Pick a random start point and select an interval (every  $n^{\text{th}}$  where  $n = \text{total possible stints} \div \text{number of stints you require to achieve the target number of counting locations or completed spectator surveys you hope to achieve, to the nearest whole number}$ );
3. Starting at your random start point, count every  $n^{\text{th}}$  (your interval). Keep counting until you have been through the entire list of possible stint times. The rows that correspond to every  $n^{\text{th}}$  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 if you anticipate considerable variation in the flow of attendees. It is a more complex approach and requires additional effort when you transform your “sample” into estimates for the full attendance at your event than simple random sampling, but it has the advantage of increasing the *yield* of completed tallies and spectator surveys for each hour your interviewers are working on the site.

Possible options for stratification include gate or zone, weekday versus weekend days, high volume versus low volume times or days, or other significant anticipated differences in attendee volumes. Knowledge of the event will help you determine the optimal variables for stratification of your stint sample.

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, first for a simple random sample and second for a stratified random sample.

### 3. A generic simple random sampling plan

In this and the following section, some generic principles for constructing stint sampling plans are provided. Here we provide the basic steps you would follow for a *simple random sample*. In the following section, we describe the basic steps you would follow for a *stratified random sample*. Remember, these are examples *only*. You will build the stint sampling plan based on the particular characteristics of your event.

#### a) **Assumptions about the event**

You have estimated that approximately 5 stints are required to meet the “target number of completed spectator surveys”, as follows:

- Interviewer teams of 4
- Target = 400 completed spectator surveys with *all spectators*.
- Require: 21 interviewer stints
- 5 stints to be selected from stint listing (21 interviewer stints ÷ 4 interviewers per team = 5 stints\*)

\*rounded to nearest whole number

In our example we have made the following assumptions about the characteristics of the event.

- 2 count or tally zones
- 2 time blocks
  - 10:00 am to 2:30 pm
  - 2:30 pm to 7:00 pm
- 4 days duration

To identify the 5 stints you require, you would follow the steps described on the following page.

**b) Step 1: list all possible stints**

In this example, the you would have 16 possible stints, calculated as follows:

$$[2 \text{ Zones} * 2 \text{ Time Blocks per Day} * 4 \text{ Days} = 16].$$

You would list these stints, in sequence, as shown below.

Stint #	Day of week	Date	Time	Count/Tally Gate or Zone
1	Monday	May 1	10:00 – 2:30	A
2	Monday	May 1	2:30 – 7:00	A
3	Monday	May 1	10:00 – 2:30	B
4	Monday	May 1	2:30 – 7:00	B
5	Tuesday	May 2	10:00 – 2:30	A
6	Tuesday	May 2	2:30 – 7:00	A
7	Tuesday	May 2	10:00 – 2:30	B
8	Tuesday	May 2	2:30 – 7:00	B
9	Wednesday	May 3	10:00 – 2:30	A
10	Wednesday	May 3	2:30 – 7:00	A
11	Wednesday	May 3	10:00 – 2:30	B
12	Wednesday	May 3	2:30 – 7:00	B
13	Thursday	May 4	10:00 – 2:30	A
14	Thursday	May 4	2:30 – 7:00	A
15	Thursday	May 4	10:00 – 2:30	B
16	Thursday	May 4	2:30 – 7:00	B

**c) Step 2: select random start point & interval**

We have selected the 5<sup>th</sup> stint down as the **random start point**, but you can select any row in the list to begin the “counting process”.

Our **interval** (*n*) in this example is 3, as described below:

$$n = \text{total possible stints (16)} \div \text{number of stints you require to achieve your target number of completed spectator surveys (5)} = 3.$$

$$16 \div 5 = 3.2, \text{ rounded to the nearest whole number [3].}$$

**d) Step 3: select stints**

You must go through the entire list, selecting stints until you arrive back at or near your Random Start Point.

Stint #	Day of week	Date	Time	Count/Tally Gate or Zone	Selected Stints
					Count continued from endpoint
1	Monday	May 1	10:00 – 2:30	A	1
2	Monday	May 1	2:30 – 7:00	A	2
3	Monday	May 1	10:00 – 2:30	B	3 Selected
4	Monday	May 1	2:30 – 7:00	B	1
5	Tuesday*	May 2	10:00 – 2:30	A	1 Random Start Point
6	Tuesday	May 2	2:30 – 7:00	A	2
7	Tuesday	May 2	10:00 – 2:30	B	3 Selected
8	Tuesday	May 2	2:30 – 7:00	B	1
9	Wednesday	May 3	10:00 – 2:30	A	2
10	Wednesday	May 3	2:30 – 7:00	A	3 Selected
11	Wednesday	May 3	10:00 – 2:30	B	1
12	Wednesday	May 3	2:30 – 7:00	B	2
13	Thursday	May 4	10:00 – 2:30	A	3 Selected
14	Thursday	May 4	2:30 – 7:00	A	1
15	Thursday	May 4	10:00 – 2:30	B	2
16	Thursday	May 4	2:30 – 7:00	B	3 Selected
*Random Start Point					

**e) Check your stint selections**

Review the final stint distribution to ensure that you have included at least one stint that represents different days of the week, different gates or on-site locations and different times per day. Why? Because the people who are on-site at high and low volume periods and at different locations may be different from one another. To represent all types of spectators, you have to give everyone an *opportunity* to be included in your sample.

Be sure to retain at least some stints that represent “typical” and “not typical” times. For example, if your event includes major holiday periods such as the winter or spring school break, you should make sure to include at least some stints that correspond to these “atypical” periods. See Stratified Stint Selection Procedures (following section) for ways to increase yields for high volume periods.

Selected Stints					
Stint #	Day of week	Date	Time	Count/Tally Gate or Zone	Selected Stints
3	Monday	May 1	10:00 – 2:30	B	Selected
7	Tuesday	May 2	10:00 – 2:30	B	Selected
10	Wednesday	May 3	2:30 – 7:00	A	Selected
13	Thursday	May 4	10:00 – 2:30	A	Selected
16	Thursday	May 4	2:30 – 7:00	B	Selected

**f) Assigning interviewer stints for tallying**

Now you know when (date, time) and where (gates or zones) you will be counting and/or tallying your attendees. The next task is to determine how many interviewer stints (number of interviewers per time block) to assign to each date/time/zone.

If you anticipate a relatively “even” flow of attendees throughout your event, you would assign equal numbers of interviewers to each time/location selection you have made. Many events, however, do not have an even flow. For example, some events have much higher attendance on weekends than on weekdays. Some have relatively low flows in the mornings but much heavier flows in the afternoon. And some events have special timed activities that will change the visitor flow. You need to consider the particular features of your event to decide how to maximize the number of tallies you complete while retaining the systematic nature of your sample.

In this example, we have assumed that you will assign four (4) interviewers to each “team” and therefore, to each “stint”. You can adjust this number to take into account uneven flows of attendees to increase yield or, preferably, you can use a stratified stint sampling approach to achieve this goal (see next section).

In addition to the number of tally interviewers assigned to a stint, additional staff will be required to implement the appropriate counting process to estimate total attendance (these procedures and staff requirements differ from approach to approach).

**4. 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 times and/or zones 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.

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 in the previous section for a “simple random sample” for all possible time periods/ locations *within* each of the stratum. In other words, you would repeat the steps described for a Simple Random Sample, first for all of your *high volume* time periods/locations and then for all the *low volume* time periods/ locations.

**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.

**c) Assumptions about the event**

In this example, we have made the following assumptions about the characteristics of the event. The event has:

- 2 count or tally zones
- 2 time blocks
  - 10:00 am to 2:30 pm
  - 2:30 pm to 7:00 pm
- 7 days duration

You expect higher volumes of spectators on Friday and Saturday (*high volume*), and lower volumes of spectators on Sunday through Thursday (*low volume*).

You have estimated that approximately 5 *high volume* stints and 5 *low volume* stints are required to meet the “target number of completed spectator surveys”.

**d) Step 1: list all possible stints**

Total number of listed possible stints for counting and/or tallying would be 28 (as follows):

$$[2 \text{ Zones} * 2 \text{ Time Blocks/Day} * 7 \text{ Days} = 28]$$

Of these 28 stints, 8 would be High Volume stints (e.g., Friday/Saturday) and 20 would be Low Volume stints (e.g., Sunday – Thursday).

You would list the 8 High Volume and the 20 Low Volume stints *separately* (see following charts).



**e) Step 2: select random start point & interval**

In this example, we have selected the 5<sup>th</sup> 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 2, as described below:

$n = \text{total possible high volume stints (8)} \div \text{number of high volume stints you require to achieve your target number of completed spectator surveys (5)} = 2.$

$8 \div 5 = 1.6$ , rounded to the nearest whole number [2].

The interval (*n*) for *low volume stints* in this example is 4, as described below:

$n = \text{total possible low volume stints (20)} \div \text{number of low volume stints you require to achieve your target number of completed spectator surveys (5)} = 4.$

$20 \div 5 = 4$

**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 spectator survey questionnaires you set (See Section IV-C for a discussion of how to set target completions).
- For the High Volume list, your interval is every 2nd.
- For the Low Volume list, your interval is every 4<sup>th</sup>.

See the examples below for how you would set up stint listings and selection procedures for a stratified sampling plan.

<b>High Volume Stints = Friday/Saturday</b>				
Random Start Point = 5				
Interval for Selection = 2nd				
Day of week	Date	Time	Count/Tally Gate or Zone	Count (continued from endpoint)
Friday	May 6	10:00 – 2:30	A	2
Friday	May 6	2:30 – 7:00	A	1
Friday	May 6	10:00 – 2:30	B	2 Selected
Friday*	May 6	2:30 – 7:00	B	1*Random Start
Saturday	May 7	10:00 – 2:30	A	2 Selected
Saturday	May 7	2:30 – 7:00	A	1
Saturday	May 7	10:00 – 2:30	B	2 Selected
Saturday	May 7	2:30 – 7:00	B	1

The selection process for *high volume* stints produced only **four** selected stints. One additional stint must be selected in this example to reach the target of five stints. To identify this additional stint, you would use the same list but pick a different start point and apply the **same interval** you used in the *first round* selection (in this example, the interval is 2). By doing this, you would eventually identify a stint that was *not* identified in your original selection.

To select the additional stint: select a different start point (see *Friday, May 6, 10:00 - 2:30*) and begin the counting process again, using the original interval (2). The first stint identified in this process is your “selected” **fifth** stint.

High Volume Stints = Friday/Saturday				
Random Start Point = 3				
Interval for Selection = 2 <sup>nd</sup>				
Day of week	Date	Time	Count/Tally Gate or Zone	Count (continued from endpoint)
Friday	May 6	10:00 – 2:30	A	1
Friday	May 6	2:30 – 7:00	A	2
Friday	May 6	10:00 – 2:30	B	1*New Random Start
Friday	May 6	2:30 – 7:00	B	2 Selected (new)
Saturday	May 7	10:00 – 2:30	A	2 Selected
Saturday	May 7	2:30 – 7:00	A	2
Saturday	May 7	10:00 – 2:30	B	1 Selected
Saturday	May 7	2:30 – 7:00	B	2

Friday, May 6 from 2:30 – 7:00 at Gate or Zone B is the additional stint to be added to your *high volume* stints. Thus, your final *high volume* stint sample would include the following:

High Volume Stints = Friday/Saturday				
Random Start Point = 4				
Interval for Selection = 2 <sup>nd</sup>				
Day of week	Date	Time	Count/Tally Gate or Zone	Selected Stints
Friday	May 6	10:00 – 2:30	A	Selected
Friday	May 6	10:00 – 2:30	B	Selected
Friday	May 6	2:30 – 7:00	B	Selected
Saturday	May 7	10:00 – 2:30	A	Selected
Saturday	May 7	10:00 – 2:30	B	Selected

Repeat the process used for *high volume stints* when selecting *low volume* stints (see below). As noted above, the random start point in this example is the fifth listed stint and the interval is every 4<sup>th</sup>. Five *low volume* stints will be selected in this process.

<b>Low Volume Stints = Sunday through Thursday</b>				
Random Start Point = 5				
Interval for Selection = 4th				
Day of week	Date	Time	Count/Tally Gate or Zone	Count (continued from endpoint)
Sunday	May 1	10:00 – 2:30	A	1
Sunday	May 1	2:30 – 7:00	A	2
Sunday	May 1	10:00 – 2:30	B	3
Sunday	May 1	2:30 – 7:00	B	4 Selected
Monday*	May 2	10:00 – 2:30	A	1*Random Start
Monday	May 2	2:30 – 7:00	A	2
Monday	May 2	10:00 – 2:30	B	3
Monday	May 2	2:30 – 7:00	B	4 Selected
Tuesday	May 3	10:00 – 2:30	A	1
Tuesday	May 3	2:30 – 7:00	A	2
Tuesday	May 3	10:00 – 2:30	B	3
Tuesday	May 3	2:30 – 7:00	B	4 Selected
Wednesday	May 4	10:00 – 2:30	A	1
Wednesday	May 4	2:30 – 7:00	A	2
Wednesday	May 4	10:00 – 2:30	B	3
Wednesday	May 4	2:30 – 7:00	B	4 Selected
Thursday	May 5	10:00 – 2:30	A	1
Thursday	May 5	2:30 – 7:00	A	2
Thursday	May 5	10:00 – 2:30	B	3
Thursday	May 5	2:30 – 7:00	B	4 Selected

### E. Counting attendees

If you have turnstiles or tickets that are collected at each gate, 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 gate 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 spectator 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 gate/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 gates to your event. Tickets for each stint would be used to project the number of tallied and spectator 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 Spectator Survey to the total universe of event-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 event during your selected stints. If there are multiple turnstiles or entrances at a single “gate” or location, you will likely need more than one counter to keep up with traffic entering through the gate, 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* visitors

Some of the people who enter your event during a stint may be counted by the counter, but will be the event’s or venue’s staff members, merchants, or volunteers. Generally, these types of attendees are excluded from tourism economic impact assessments.

If you are conducting a separate study of **participants** (athletes, etc.) and/or the **media**, you will also require a way to **exclude** spending by these tourists from your **spectator** estimates. If you do not exclude their spending from the spectator study, you would “double count” their economic contribution to your event.

If any types of individuals are to be excluded from your final estimates, you will have to identify how many *excluded visitors* came to your event 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 V).

### 3. What happens if you “miss” a stint?

If inclement weather or some other reason causes you to 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 gate, same time period but a different day assuming there is still time left in your event’s schedule).
- If you cannot replace the missed stint because there is not enough time left in your event’s schedule, the stints you DID conduct will all have a higher stint weight than they would have had if you had conducted the “missed” stint.

## V. 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 event. 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 the event.

#### 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 visitors?

- You know numbers of people who entered your event at particular times/locations; and
- You know the type of entrant (e.g., local and tourist spectators, staff, merchant, athlete, media representative, etc.), party composition and place of residence of a portion of the people who entered your event 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 event. 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 Spectator 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 event 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, merchants, volunteers, athletes, media, etc.);
4. Expand “stints” to total event;
5. Adjust for actual daily attendance;
6. FOR MULTI-DAY EVENTS: Adjust for *unique attendees*.

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

As noted in the *Designing a Sampling Plan for Counts and Tallies* section above, more complex weighting and projection procedures are required if you use a stratified approach to sampling than if you use a simple random sampling plan. In the following sections, the weighting and projection procedures for each of these approaches are described, commencing with the simple random sample design.

### **1. The weighting and projection process for simple 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 event at a particular time and location. These “counts” are used to estimate how many of the people you *tallied* came to your event at that same time/ location.

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, 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.

$$S_1 (\text{SPC} \div \text{SPT}) * \text{Each Tally Record in Stint} = \text{AST}$$

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)
			<b>Required Factor</b>	
S <sub>1</sub>	250	31	<b>8.065</b>	250
S <sub>2</sub>	122	17	<b>7.176</b>	122
S <sub>3</sub>	230	46	<b>5.000</b>	230
S <sub>4</sub>	89	28	<b>3.179</b>	89
S <sub>5</sub>	179	58	<b>3.086</b>	179
S <sub>6</sub>	136	65	<b>2.092</b>	136
S <sub>7</sub>	268	83	<b>3.229</b>	268
S <sub>8</sub>	122	17	<b>7.176</b>	122
S <sub>9</sub>	230	46	<b>5.000</b>	230
Total	1,626	391		1,626

**c) Special notes for concentrated entry events**

A **concentrated entry event** is one in which most or all of the attendees arrive within a very short time span. Examples might include a sporting event, or a concert.

**Attendee Counts:** Counting of attendees would take place throughout the “peak” entry time.

**Attendee Tallies:** The entrance gate 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 event.

Additional on-site tally locations should be selected by event organizers to coincide with locations and times *on the 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 gate should be selected for tallying stints.

If you use on-site locations for tallying attendees, you must obtain entry gate/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 *entry gate/time*.

If the entry gate/time a tally respondent entered your event does *not* match a stint for which you conducted tallies (same entry gate/time), you will have to identify a stint which most closely resembles the reported entry gate/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 vendors, staff, etc. from adjusted stint counts**

There are two basic types of excluded groups for a sporting event:

**Type 1: Vendors, paid or unpaid event staff including volunteers, etc.**

Some people who entered your event and were counted during a stint may be vendors, paid or unpaid event staff including volunteers, etc. For a tourism economic impact assessment, these individuals are generally removed from the tallies.

Members of excluded groups may be *locals* or they may be from outside your community (merchants who come to sell food or retail products at the event). 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. In some cases, 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 their own special gate (one that is not open to the general public), you would exclude this gate from your sampling frame, exclude



the question from the Tally Questionnaire and ignore the calculation described here. Event organizers 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.

**Type 2: Participants (athletes, etc.) and media representatives.**

Some people who entered your event and were counted during a stint may be athletes, their staff, officials (judges, referees) and/or representatives of the media. If you are conducting studies of participants and/or media representatives or developing average spending estimates from the Spectator Study to apply to them, spending by or on behalf of these individuals must be extracted from the Spectator Study. Otherwise, you would be counting their spending more than once.

If, however, you are NOT conducting stand-alone studies of one or both of these groups or using averages generated from the Spectator Study or spending estimates from event organizers to apply to these groups, you would make no special adjustments for these groups (participants/media representatives). They would be treated just like all other spectators at your event.

**e) Step 4: Expand “stints” to total event**

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 event.

You can adjust your stint counts to the total in different ways depending on how you sampled and how much information you have available.

In the simplest case, you could use the ratio of the number of selected stints to total possible stints as the adjustment factor. In the Simple Random Stint Sampling Plan example, there were 84 possible stints and 33 were selected for counting and tallying. The stint adjustment would be:

$$\text{Total stints (84)} \div \text{Sampled stints (33)} = \text{Stint Weight (2.545)}$$

The stint weight should be multiplied by the Total Attendees for Projection Purposes to provide the total attendees represented by each tally stint. In the following example, all stints have equal weight.

**Example of Weighting/Projection for a Simple Random Sampling Plan**

Stint	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 Spectators Represented by Tallies
S <sub>1</sub>	250	31	8.065	250	237.47	2.545	604.36
S <sub>2</sub>	122	17	7.176	122	112.44	2.545	286.16
S <sub>3</sub>	230	46	5.000	230	224.12	2.545	570.39
S <sub>4</sub>	89	28	3.179	89	87	2.545	221.42
S <sub>5</sub>	179	58	3.086	179	169.63	2.545	431.71
S <sub>6</sub>	136	65	2.092	136	130.47	2.545	332.05
S <sub>7</sub>	268	83	3.229	268	260	2.545	661.70
S <sub>8</sub>	122	17	7.176	122	115.29	2.545	293.41
S <sub>9</sub>	230	46	5.000	230	219.12	2.545	557.66
Total	1,626	391		1,626			3,959

**f) Step 5: Adjustment for actual attendance**

If all spectators require a ticket to enter the event, the total number of spectators in your sample should be the same number as tickets used. Because sampling is not always perfect, however, you may adjust the “sample” to the known number of tickets used by spectators to enter the event. If you have this information on a day-by-day basis and/or a gate-by-gate basis, you should sort your stint estimates into these groups and adjust each group individually.

Simple Random Sample Plan	Stint	Actual Attendance On Day 1	Actual Attendance On Day 2	Actual Attendance On Day 3	Total Spectators Represented by Tallies	Attendance Adjustment	Total Adjusted Attendance
Day 1		1,681			1,532	1.097	1,681
	S <sub>1</sub>				636	1.097	698
	S <sub>2</sub>				311	1.097	341
	S <sub>3</sub>				585	1.097	642
Day 2			1,063		1,029	1.033	1,063
	S <sub>4</sub>				227	1.033	235
	S <sub>5</sub>				456	1.033	471
	S <sub>6</sub>				346	1.033	357
Day 3				1,555	1,578	0.985	1,555
	S <sub>7</sub>				682	0.985	672
	S <sub>8</sub>				311	0.985	306
	S <sub>9</sub>				585	0.985	576

In the example shown here, we assume you know attendance by day. If you only have a total attendance figure, you can use it to make the final adjustment. If you have used a stratified sampling plan, you would use ticket counts for each day of the week separately or for each stratum (e.g., Friday/Saturday combined and Thursday/Sunday combined).

If you do not have counts for each day or each stratum, you would add your adjusted totals for each stratum together and make the final adjustment, in total for the full duration of your event.

**2. The weighting and projection process for stratified random samples**

**a) Step 1: Convert tallied “party” to “people”, on a record by record basis**

See instructions for “Simple Random Sample” (Step 1)

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

See instructions for “Simple Random Sample” (Step 2)

**c) Step 3: Excluding vendors, staff, etc. from adjusted stint counts (and participants/media representatives if you are conducting stand-alone studies)**

See instructions for “Simple Random Sample” (Step 3)

**d) Step 4: Expand “stints” to total event**

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 event.

The following example assumes that you used a stratified stint sampling plan (e.g., sampled Fridays and Saturdays differently than Sundays through Thursdays).

Total **Friday/Saturday** stints (24) ÷ Sampled stints (12) = Stint Weight (2.0)

Total **Sunday - Thursday** stints (60) ÷ Sampled stints (12) = Stint Weight (5.0)

**Example: Stratified Random Sample Weighting & Projection (Tallies)**

Friday/ Sat- urday 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 Spectators Represented byTallies
S <sub>1</sub>	250	31	8.065	250	237.47	2.0	475
S <sub>2</sub>	122	17	7.176	122	112.44	2.0	225
S <sub>3</sub>	230	46	5.000	230	224.12	2.0	448
S <sub>4</sub>	89	28	3.179	89	87	2.0	174
S <sub>5</sub>	179	58	3.086	179	169.63	2.0	339
S <sub>6</sub>	136	65	2.092	136	130.47	2.0	261
S <sub>7</sub>	268	83	3.229	268	260	2.0	520
S <sub>8</sub>	122	17	7.176	122	115.29	2.0	231
S <sub>9</sub>	230	46	5.000	230	219.12	2.0	438
S <sub>10</sub>	136	65	2.092	136	130.47	2.0	261
S <sub>11</sub>	268	83	3.229	268	260	2.0	520
S <sub>12</sub>	122	17	7.176	122	115.29	2.0	231
Total	2,152	556		2,152			4,123

Sun./ Thurs. 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 Spectators Represented byTallies
S <sub>1</sub>	150	31	4.8387	150	135	5.0	676
S <sub>2</sub>	76	17	4.4705	76	68	5.0	342
S <sub>3</sub>	89	46	1.9347	89	80	5.0	401
S <sub>4</sub>	60	28	2.1428	60	54	5.0	270
S <sub>5</sub>	102	58	1.7586	102	92	5.0	459
S <sub>6</sub>	135	43	3.1395	135	135	5.0	675
S <sub>7</sub>	64	37	1.7297	64	58	5.0	288
S <sub>8</sub>	78	22	3.5454	78	78	5.0	390
S <sub>9</sub>	102	36	2.8333	102	92	5.0	459
S <sub>10</sub>	135	65	2.0769	135	122	5.0	608
S <sub>11</sub>	64	27	2.3703	64	58	5.0	288
S <sub>12</sub>	122	29	4.2068	122	110	5.0	549
Total	1,177	439		1,177			5,404

**e) Step 5: Adjustment for actual attendance**

See instructions for “Simple Random Sample” (Step 5)

**f) Step 6: Special adjustment for multi-day events**

See instructions for “Simple Random Sample” (Step 6)

**3. 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 spectators 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 spectators 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, from other provinces, and from foreign countries. Some of the people who enter your event during a stint may be counted by the counter, but will be staff members, merchants, participants 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 at your event derives from the local community and how much is coming in from other places. As shown below for two sample stints (S<sub>1</sub>, S<sub>2</sub>) 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**

Stint		Tallied Attendees	Stint Count Weight	Exclusion Weight	Stint Weight	Attendance Weight	Weighted, Projected Spectators
S <sub>1</sub>	<b>Total</b>	<b>31</b>	<b>8.065</b>	<b>.998</b>	<b>2.545</b>	<b>1.097258</b>	<b>697</b>
S <sub>1</sub>	Local	20	8.065	.998	2.545	1.097258	<b>450</b>
S <sub>1</sub>	Non-local – Same Province	9	8.065	0	2.545	1.097258	<b>203</b>
S <sub>1</sub>	Other Provinces	1	8.065	0	2.545	1.097258	<b>23</b>
S <sub>1</sub>	Other Country	1	8.065	0	2.545	1.097258	<b>23</b>
S <sub>2</sub>	<b>Total</b>	<b>17</b>	<b>7.176</b>	<b>.999</b>	<b>2.545</b>	<b>1.097258</b>	<b>340</b>
S <sub>2</sub>	Local	10	7.176	.999	2.545	1.097258	<b>200</b>
S <sub>2</sub>	Non-local – Same Province	3	7.176	0	2.545	1.097258	<b>60</b>
S <sub>2</sub>	Other Provinces	2	7.176	0	2.545	1.097258	<b>40</b>
S <sub>2</sub>	Other Country	2	7.176	0	2.545	1.097258	<b>40</b>

**Repeat for each stint**

In this example, of the 1,037 weighted, projected spectators 63% were residents of the local community, 25% came from other parts of the province, 6% live in other provinces, and 6% live in foreign countries. When you go through these procedures, you would calculate the total visitation by origin for *all* stints.

<b>Weighted, Projected Visitors, Stints 1, 2 by Place of Residence</b>				
Place of Residence	Stint 1	Stint 2	Total	Percent
Total (All)	697 +	340	= 1,037	100%
Local	450 +	200	= 650	63%
Non-local – Same Province	203 +	60	=263	25%
Other Provinces	23 +	40	= 63	6%
Other Country	23 +	40	= 63	6%

#### 4. 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 event. In turn, these ratios will enable you to calculate total spending at the event and in the community and to determine how much of this spending is *incremental* because the event attracted *tourists* to the community [**Note: an extra procedure is required to estimate *unique* attendees if yours is a multi-day event. See below for details.**].

#### 5. Step 6: special adjustment for multi-day events

A person who comes to your multi-day event on only one day has a different opportunity to be counted and tallied than does someone who comes on more than one day. Let's assume your event lasts for three days (Friday through Sunday). The household party that only comes on Friday has no chance of being counted and tallied on Saturday or Sunday but the household party who comes on Friday and Saturday could be counted and tallied on *both* days.

To estimate the number of *unique* household parties that attended your event over its full duration, you need to adjust for the number of different days the *same* household party might attend. It is for this reason that the Tally Questionnaire asks you to collect information on the number of different days the household party has or plans to come to your event.

You need an estimate of the number of *different people* who came to your event over its full course to estimate the amount of spending your event generated because in the Spectator Survey, respondents are asked to report their spending on-site and in your community for the *full duration of their stay and all their visits to your event*. Consequently, you must divide your

final estimates of spectators by the number of different days each tallied attendee party (local and non-local) came to your event, on a record-by-record basis. Here is an example:

- Household 1: 4 people, plan to attend event on 1 day.
- Household 2: 4 people, plan to attend event on 2 days.
- Household 3: 4 people, plan to attend event on 3 days.
- Household 4: 2 people, plan to attend event on 1 day.

**The calculation to obtain unique spectators:**

$\frac{\text{(People Tallied by Place of Origin * Stint Count Weight * Exclusion Weight * Stint Weight * Attendance Weight)}}{\text{Number of Days Attended/Plan to Attend Event}}$
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	People Tallied by Place of Origin	Stint Count Weight	Exclusion Weight	Stint Weight	Attendance Weight	Sum Of Spectators On All Days	# Of Days At Event	Unique Spectators
Household 1	4	8.065	.998	2.545	1.097258	89.91	1	89.91
Household 2	4	7.176	.999	2.545	1.097258	80.08	2	40.04
Household 3	4	7.176	.999	2.545	1.097258	80.08	3	26.69
Household 4	2	8.065	.998	2.545	1.097258	44.95	1	44.95

If yours were a multi-day event, you would use the results of this calculation to estimate the proportion of unique spectators by place of origin (see above).

## VI. 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](http://www.ttra.com)), Marketing Research and Intelligence Association (Canada) (MRIA, [www.mria-arim.ca](http://www.mria-arim.ca)), or Marketing Research Association (U.S.A.) (MRA, [www.mra-net.org](http://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 event should have the following characteristics:<sup>18</sup>

- 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.

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<sup>18</sup> 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 department, 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.<sup>19</sup>

- 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.

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<sup>19</sup> 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:<sup>20</sup>

- 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.

#### 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 event organizers indicating that they are conducting an official survey with the sanction of the event). 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 event. Consequently, you should provide interviewers with a site map and general knowledge about the locations of key amenities (food services, washrooms, etc.). Event organizers should brief the interviewers and provide them with appropriate materials so they can answer basic questions.

Interviewers also require a way to contact a supervisor or event organizer (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.

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<sup>20</sup> Ibid.

**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.).<sup>21</sup>

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

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<sup>21</sup> Ibid.

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.

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

When approaching people as they enter the event, 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 *n*th** (e.g., every 5<sup>th</sup>) person as he/she enters the event 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 *n*th 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 entry flows are very brisk at a gate, the interval could be every 3<sup>rd</sup> or every 5<sup>th</sup> 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 event together).

#### 4. The tally questionnaire

##### a) *General comments for recruiting spectators for the Spectator Survey*

In the tally interview, you will obtain the information you require to weight and project the information you collect from your **Spectator Survey**. We also recommend that you use the tally interview to *recruit* respondents for the Spectator Survey. Questions associated with the recruitment task included in the tally questionnaire will vary somewhat, depending on how you plan to undertake the Spectator Survey. Different approaches to identifying the sample for the Spectator 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” spectators when they enter the event so that you can conduct a face-to-face interview with the individual as he/she exits the event, 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 Spectator Survey by telephone, you would have statements that describe this procedure to potential respondents.

**ON-SITE RANDOM SELECTION** If you plan to approach spectators on a random basis *on the site* during the course of the event to conduct the Spectator Survey, you require a separate stint sampling plan for the Spectator Survey.

**SELF-COMPLETION MAILBACK** questionnaires can be distributed as spectators 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 Spectator 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 Spectator 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 V.

**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 attendees.

**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 the site.

**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 event.

Hi, my name is XXXX INTERVIEWER’S FIRST NAME. Welcome to NAME EVENT. 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 event. (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 event 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 EVENT today?

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

**g) A special note about "Previous Tally"**

These guidelines provide a Spectator Survey design that captures *all* spending on the site and *all* spending for the stay in the community by spectators 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 event but would be asked to complete only ONE Spectator Survey, covering the full duration of their stay in the community. If *local residents* are included in the Spectator Survey, they too will be asked to complete only one Spectator Survey for all the days they visited the event'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, bleachers, etc. The information is necessary to link the tallied party to entry counts for the event.

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

Location (pre-list to correspond to entry gates)  
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 Spectator Surveys. Thus, particular attention should be paid to collecting place of residence information completely and accurately.

Is XXXX (NAME CITY/TOWN IN WHICH EVENT 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 event has defined to be the "local area".

**j) Place of residence - other**

**IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF EVENT, 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/State \_\_\_\_\_  
Country \_\_\_\_\_  
IF CANADA/USA: Postal/Zip Code \_\_\_\_\_

**k) Identifying tourists and overnight tourists**

**IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF EVENT, 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 event. 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 event to attract considerable motorcoach tour traffic.

If **children** are “free” to enter the event, 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 event site.

**How many people who live in your household came to NAME EVENT 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)**

In this question, you would identify the groups to be excluded from your spectator estimates. Note that participants and media representatives are *identified* here but not excluded from the tally/questionnaire distribution process.

**How many people in your group, if any, are [Are you] here as a member of the event staff, a vendor, or volunteer to help with today’s event, as a participant (an athlete or part of an athlete’s staff such as a coach, trainer, or physician), an official (e.g., referee or judge), or as a media representative/crew assigned to cover this event? RECORD # OPPOSITE APPROPRIATE CATEGORY. FOR EACH “EXCLUDED CATEGORY” (\*ed): IF ALL PARTY MEMBERS ARE “EXCLUDED”, RECORD ON TALLY SHEET & TERMINATE**

CODE	#
*A Event Staff	_____
*B Vendor/merchant	_____
*C Volunteer	_____
D Participant (athlete/staff/officials)	_____
E Media (reporters, crew, etc.)	_____

**n) Type of ticket(s) used**

**Which type of ticket(s) did you use to enter NAME EVENT today?** [OPTIONAL, depends on circumstances of Event. See Tally Procedures]

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

**o) Number of days have/plan to attend event**

IF MULTI-DAY EVENT: NAME EVENT lasts for X days. Over the full course of the event, on how many different days have you/do you plan to attend as a spectator, counting today’s visit?

WRITE IN NUMBER OF DAYS \_\_\_\_\_

DON'T KNOW/CAN'T ESTIMATE [ ]

### **C. Recruitment for spectator survey**

#### **1. Additional questions required in tally interview**

If you were planning to use the tally procedure to recruit participants for the Spectator 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 spectators 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 Spectator Surveys from “hard to find” spectators (e.g., tourists) and involves the least investment in interviewer time, training and supervision.

If you plan to collect completed Spectator Surveys as people exit your event, you will require collection receptacles and staff at exit points reminding spectators 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 spectators can complete the questionnaire just before they leave. A “Complete your Survey Here” sign would also encourage spectators 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 Spectator Survey. The incentive could take the form of a souvenir of the event 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 event, etc.).

#### **3. Recruitment for self-completion spectator survey at tally stage**

We recommend that you have two versions of the Spectator 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 5<sup>th</sup> or every 10<sup>th</sup> local household party would be asked to complete the Spectator Survey, tally interviewers will have to keep track of the interval as they distribute questionnaires.

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

Because we recommend that different Spectator 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 Spectator 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 would 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 Spectator Questionnaires using a different series (e.g., L-0023 for a "local" and T-0045 for a "tourist").

**a) Recruitment questions for locals at single day event**

ASK EVERY *n*th LOCAL: In order for us to learn more about your reactions to NAME EVENT 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 at single day event**

NON-LOCAL: In order for us to learn more about your reactions to NAME EVENT 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

**c) Recruitment questions at multi-day event**

IF MULTI-DAY EVENT: 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 event?

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

**Recruitment Questions for Non-Locals at multi-day event**

In order for us to learn more about your reactions to NAME EVENT 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

**Recruitment Questions for Locals at multi-day event**

LOCAL: In order for us to learn more about your reactions to NAME EVENT and spending at this event, would **the person most able to report on spending** for all people in your household who came to this event 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

## VII. 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 event, 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 event during the Tally Stint and for identifying the total number of attendees who entered the event 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 event 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 event during the Tally Stint and for identifying the total number of attendees who entered the event 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.

## VIII. SPECTATOR SURVEY ANALYSIS PLAN – NON-LOCALS

### A. An overview

Once your Spectator 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 “Event Account” (identification of spending in the community and larger area that is *incremental*)
5. Weighting and projecting survey responders to all non-local spectators.

These steps are described in greater detail in the sections that follow. Sample Spectator questionnaires are provided in Appendix VII.

### 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 as your event, and the 600 series for *non-locals* who live outside the province in which your event takes place. 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* and so on.

Local	Non-local – same province	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 questionnaire 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 Spectator Survey is a measure of how representative your *sample* of spectators is of *all* spectators. 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 ( $C \div N$  in the table below).

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

For more information on calculating response rates, see Chapter IX (*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: Spectator 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 Spectator 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 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

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 or state and the number of days on which a respondent went to your event 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 spectators 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.<sup>22</sup>

#### 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 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, use the respondent’s distribution for each category, with three exceptions: vehicle operations, vehicle rental and domestic carrier fares (see Appendix IV, Section F, Geographic Distribution Tables).

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<sup>22</sup> For more information on how to distribute spending to various categories, see Appendices III, IV.

- 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 F, Geographic Distribution Tables). These rules help you to allocate expenditures to the local community and the balance of the province.
- All *on-site* expenditures are assigned to the local community.

#### **F. Constructing “event 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 event took place. It 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 Spectator Survey:

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

##### **1. Two event account columns**

Some incremental spending accrues to the local community and other incremental spending accrues to the rest of the community’s province or state. We recommend that you create two “columns” in your Event Account so you can estimate the incremental spending at both the community and provincial or state levels. You can add additional “event 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*.

## 2. Substitution effects

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

### SIMILAR RECREATIONAL ACTIVITIES IN COMMUNITY

If you had *not* attended [NAME EVENT] on this trip, would you have gone to some other [SIMILAR TYPE OF EVENT] instead? Please refer to the map, if necessary.

	IN [NAME COMMUNITY]	IN [OTHER PARTS OF PROVINCE]
No		
Yes		
Don't Know		

## 3. Trip replacement

If the trip that included a visit to your event displaced a trip that would have taken place within the next three months, no spending is considered incremental because a "similar trip" was replaced by "this" trip (see question from Spectator Survey, below). The time period for a replacement trip or time switchers can vary. Some experts recommend a three-month period (used in these materials), whereas others use a twelve-month period. In designing your survey, you will determine the time span most appropriate for your event and community.

### IS THIS TRIP REPLACING A DIFFERENT TRIP?

Would you have come to [NAME LOCAL COMMUNITY] in the next three months if you had not come at this time for [NAME EVENT]? Please refer to the map, if necessary.

No  
Yes  
Don't Know

## 4. Importance of event in destination choice

Once substitution effects and replacement trips have been taken into account, you would apply the proportion volunteered by the respondent for the importance of your event in the destination choice to remaining expenditures in the "community" and "other parts" of the province columns to identify the amounts to be entered in the event account.<sup>23</sup>

**THE QUESTION:** Circle the number below that best describes how important [EVENT] was in your decision to visit [NAME CITY/TOWN OF EVENT] on this trip, where 0 indicates *no influence* and 10 is that [NAME EVENT] is the *main single reason* for visiting [NAME CITY/TOWN] on this trip.

No Influence										Main Reason	Don't Know
0	1	2	3	4	5	6	7	8	9	10	X

The proportion of spending that is "incremental to your event" is based on the score the respondent volunteers to the "importance question" (see above). Thus, if the respondent claims that the event

had “0” influence on the decision to come your community, *no* spending would be included in the event account. If he or she offered a score of “3”, 30% of the spending in the community and in other parts of the province would accrue to the event account.

See Appendix IV, Section G, *Identifying and Assigning Incremental Spending to Event Account* for a description of how to assign spending to the event account at the local and provincial levels.

#### **5. If importance of event question is don’t know or blank**

All questionnaires from non-locals require a value for the “importance of the event” 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 Spectator 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 **Spectator 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 spectators 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 Spectator Survey.

If yours is a multi-day event, you must use the proportions you calculated in the tally process for *unique local attendees* (taking into account the number of different days they attended your event). Before you do this, you need to “convert” completed spectator survey units from “household parties” to people.

##### **a) An example**

Step 1: Convert completed spectator 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 V-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* Spectators
S <sub>1</sub>	Local	20	450
S <sub>1</sub>	Non-local – Same Province	9	203
S <sub>1</sub>	Other Provinces	1	23
S <sub>1</sub>	Other Country	1	23
S <sub>2</sub>	Local	10	200
S <sub>2</sub>	Non-local – Same Province	3	60
S <sub>2</sub>	Other Provinces	2	40
S <sub>2</sub>	Other Country	2	40

\*Adjusted for multiple day visits if multiple day event.

**b) Spectator person weight**

Each completed non-local Spectator 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 event during the particular stint.

Thus, if you estimated that 203 non-locals from the same province entered during Stint 1, each of the five (5) completed Spectator Questionnaires representing 12 people from this place of residence/stint group will have a weight of 16.92. In other words, each of these records will “stand for” 16.92 unique non-local spectators. This final spectator weight would be coded on the respondent’s record in your data file and would be used when you run tabulations for *spectator characteristics excluding spending* (note: If your event lasted more than one day, you need to make a special adjustment in the weighting and projection to take this into account).

COMBINING TALLY & SPECTATOR INFORMATION					
Stint		Weighted, Projected Unique Spectators	Completed Spectator Questionnaires	Household Members on Trip	Spectator Person Weight
S <sub>1</sub>	Local	450	N/A	N/A	N/A
S <sub>1</sub>	Non-local – Same Province	203	5	12	16.92
S <sub>1</sub>	Other Provinces	23	1	3	14.33*
S <sub>1</sub>	Other Country	23	0	0	
S <sub>2</sub>	Local	200	N/A	N/A	N/A
S <sub>2</sub>	Non-local – Same Province	60	2	4	15.00
S <sub>2</sub>	Other Provinces	40	1	2	20.00
S <sub>2</sub>	Other Country	40	1	1	40.00

\*Cells must be merged because “Other Country” has “0” value



**c) Spectator 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 a **Spectator Household Weight**. This weight is the Spectator 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 in Stint 1 has a household party size of 2 people. The Spectator Household Weight for this record would be  $16.92 \div 2$ , or 8.46. In this case, every dollar spent in the community or in a larger geographic area for this household party would be multiplied by 8.46 to represent this and other *similar* spectator parties.

As shown below, the Spectator Household Weight must be calculated individually for each record, using the Spectator 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 Spectator Person Weight, the Spectator 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 <sub>1</sub> Non-local – Same Province					
Record	1	2	3	4	5
Spectator Person Weight (A)	16.92	16.92	16.92	16.92	16.92
# on Trip (B)	2	2	1	3	4
Spectator Household Weight (A ÷ B)	8.46	8.46	16.92	5.64	4.23

**d) Adjustment for multiple-day attendees**

Tourists may come to your event 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 event. Tally information, however, treats each *entry* to your event as a separate household party. If no adjustment were made for people who went to your event 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 the event. [See Tally Weighting for details.]

## IX. 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 EVENT held between [INSERT START AND END DATE OR THE PORTION OF THE EVENT COVERED BY THE STUDY], to gain a better understanding of who comes to EVENT 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 event and in the community, ratings of the event on a number of attributes and generation of inputs for a tourism economic impact assessment.*

In this section, you would also document any over-riding assumptions you made regarding out-of-town *participants* and/or *media representatives*. Specifically, you would indicate what steps you took to *include* or *exclude* spending by these special groups in the inputs you generated for estimating the tourism economic impact of the event.

### **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 only some of the time period of the event or only for some portions of it, you would provide describe the start and end dates of the survey period and which portions of the event are included and excluded.

#### 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 spectator 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?

In this section, you would also document what steps, if any, you took to identify out-of-town *participants* and/or *media representatives* and capture spending for these individuals..

## 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 58). Using the following 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						
Selected Stints	Month	Date	Time	Count	NEW	NEW
					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  $n^{\text{th}}$  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 on the following page.

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%	$B \div A$
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%	$C \div A$
4	Total in-scope entry parties for Spectator Survey (Total eligible to receive or asked to complete Spectator 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%	$D \div A$
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%	$E \div A$
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%	$F \div A$
7	Returned self-completion survey/completed on-site administered interview (G)	430	22%	$G \div A$
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%	$H \div A$
9	Usable questionnaires for processing (I) [I = G - H]	415	21%	$I \div A$
10	Completed Questionnaires Among All Entry Parties	22%	Row 7	
11	<b>Usable Completed Questionnaires Among All Entry Parties</b>	<b>21%</b>	Row 9	
12	<b>Usable Completed Questionnaires Among All In-Scope Parties</b>	<b>42%</b>		$I \div D$

### 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 Spectator 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 Chapters V, VI and VII 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 event account (if applicable), as described in Section VIII - 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



## X. GLOSSARY

<b>Allocated spending</b>	Allocated spending is the distribution <i>you</i> make to various spending categories and/or locations from the “total” dollar amount supplied by the respondent.
<b>Attributed spending</b>	Attributed spending is <i>your</i> assignment of spending for various spending categories and to locations for respondents who did NOT provide an indication of how much was spent.
<b>Concentrated entry event</b>	An event in which most or all of the attendees arrive within a very short time span. Examples might include a concert or other performance or a sporting event.
<b>Contiguous zones</b>	Count zones (on grid map) for an event in which all activities associated with the event take place in physically adjacent sites (contiguous).
<b>Count zones</b>	Areas on a grid map of the event area that are used to sample and count/tally attendees.
<b>Counts</b>	All attendees entering during tally stint. You will project the people you tallied during the stint to the total <i>count</i> during the same stint.
<b>Cross section of attendees</b>	All types of attendees in their correct proportions for the event as a whole (different demographic, origin, and behavioural groups, in the same proportions as they occur in the <i>real</i> population).
<b>Event account</b>	The event account includes the portion of tourist spending that is considered incremental. This is the spending that occurred <i>because</i> an event took place. It is the spending that would be fed into a tourism economic impact model.
<b>Final Ticket Adjustment Weight</b>	Adjustment to match the total number of ticketed attendees who came to the event to the number represented by your sample.
<b>Gated event</b>	An event that takes place in a confined area with “gates” or other “controlled” points of entry/exit.
<b>Grid map</b>	A map that divides the event site(s) into identifiable areas for purposes of counting and tallying attendees.
<b>Gross domestic product (GDP)</b>	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.
<b>Household travel party/household party</b>	All people travelling together and/or who came to the event together and who live in the same permanent residence.

<b>Incidence</b>	Incidence as used in these guidelines generally refers to the proportion a smaller sub-group represents of all attendees at your event (e.g., the <i>incidence of tourists is estimated to be 15%</i> means that you expect that 15% of all attendees at your event will be <i>tourists</i> ).
<b>Incremental spending</b>	Incremental spending is money that is spent at or because of the event <i>that would not otherwise</i> have been spent in the community. If the same money that is spent at or as a result of an event would have been spent in the community on other activities, goods or services, the event is not deemed to be responsible for the spending. In other words, some of the spending that takes place at an event is <i>not</i> incremental – it would have happened anyway.
<b>Interviewer Stint</b>	A unique time period at a specific entry point to your event to which one interviewer is assigned to collect information (tally and/or count attendees at your event).
<b>Media Representatives</b>	Journalists, photographers, reporters, etc. who have been assigned to cover the event.
<b>Multi-venue events</b>	<b>Multi-venue events</b> are those in which different activities take place at <b>non-contiguous</b> locations. A music festival with street performances, indoor concerts at concert facilities or clubs around town and a fireworks display at a central site would be a multi-venue or non-contiguous event.
<b>Non-contiguous zones</b>	Count zones (on grid map) for an event with multiple venues that are not physically adjacent to one another.
<b>On-site tally</b>	A systematic way of intercepting a random sample of event 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., <i>locals</i> and <i>non-locals</i> ).
<b>Participant</b>	Athletes, associated staff including trainers, coaches, physiotherapists, physicians, etc. and officials such as referees, event judges, etc.
<b>Private vehicles</b>	All vehicle types excluding large commercial vans and school and/or tour busses. Thus, private vehicles include cars, trucks, SUVs, motorhomes, RVs, bicycles and motorcycles.
<b>Projection procedures</b>	<i>Projection procedures</i> refer to how you will expand the subset (sample) of attendees included in the research process to <i>all</i> attendees and/or <i>all</i> tourists who came to your event.
<b>Record</b>	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 Spectator Survey (questionnaire).
<b>Reported spending</b>	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 and the portion (%) of this spending, converted to dollars, that the respondent claims to have spent in the local community.

<b>Sampling procedures</b>	<i>Sampling procedures</i> refer to the mechanisms you will use to identify the subset of attendees and/or tourists that will be included in the research process.
<b>Segments</b>	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 or state as your event versus those who live outside your province or state.
<b>Single venue events</b>	<b>Single venue events</b> are those in which all the activities associated with the event take place at a single site. The “site” could be a fairground or a park that includes tents, buildings and open areas, so long as these facilities are <b>contiguous</b> . That is, attendees do not have to leave the site to go from one activity to another.
<b>Stint</b>	Unique time period designated for the purpose of measurement (data collection) or observation at a specific entry point or location at an event. The stint forms the basis for <i>sampling</i> attendees who come to an event.
<b>Stint Sample</b>	A randomly selected set of stints during which you will count and/or tally attendees at your event.
<b>Stint Weight</b>	Adjustment to sampled stints so that they represent all people who entered your event.
<b>Substitution effects</b>	Spending that would have taken place if your event had not been held. For example, if Dave and Diane decided to go to the event instead of going to a movie at the theatre and the ticket prices for your event and the movie were the same, your event would have produced <i>no</i> incremental spending. Why not? Because Dave and Diane would have spent the <i>same amount</i> of money in your community on a recreational activity – whether your event took place or not. (Note that we are assuming that any difference in the indirect or induced impacts are likely small and can be safely ignored.)
<b>Tally Interview</b>	Short interview to obtain basic information about which attendees are locals, tourists, etc. The Tally Interview also provides information required for weighting and projecting the sampled population to the full population of attendees at an event and a tool for distributing a more detailed Spectator Survey to a sample of spectators (to capture spending and rating characteristics).
<b>Time switchers</b>	See “trip replacement” below.
<b>Tourism economic impact</b>	Tourism economic impact is the <i>change</i> 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.

<b>Tourism economic impact model</b>	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.
<b>Tourist</b>	<p>The manner in which the World Tourism Organization's guidelines for the <i>tourism</i> component of <i>travel</i> is operationalized for measurement purposes varies from country to country. Event organizers 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.</p> <p>An overnight domestic tourist is one who claims to have taken an <i>out-of-town</i> 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 (note: some other minor exclusions apply).</p> <p>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).</p> <p>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 (note: some other minor exclusions apply).</p>
<b>Trip replacement or "time switchers"</b>	If the trip that included a visit to your event displaced a trip that would have taken place in the future, no spending is considered incremental because a "similar trip" was replaced by "this" trip. The time period for a replacement trip can vary. Some experts recommend a three-month period (used in these materials), whereas others use a twelve-month period. In designing your survey, you will determine the time span most appropriate for your event and community.
<b>Ungated or Partially Gated Event</b>	An event that takes place in whole or in part in an open area where access is not controlled.
<b>Vehicle Household Party</b>	total number of reported or counted <i>occupants</i> per vehicle who live in the same household as the tally respondent.
<b>Vehicle Occupants</b>	The total number of reported or counted <i>occupants</i> per vehicle (irrespective of whether they all live in the same household as the tally respondent).

## APPENDIX I: SUPPORTERS & PANEL OF EXPERT MEMBERS

### A. Supporters

The British Columbia Ministry of Sport, Tourism and the Arts provided financial support for modifying the other versions of the guidelines for events and festivals to reflect the measurement requirements of sporting events.

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

Canada	British Columbia Ministry of Sport, Tourism and the Arts 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 (Canadian Association of Fairs and Exhibitions' designated representative) 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

## APPENDIX II: MARGIN OF ERROR TABLE

Table of Margin of Error at 95% Level of Confidence

SAMPLE SIZE	PROPORTION OF RESPONDENTS PROVIDING A SPECIFIC RESPONSE TO A SURVEY QUESTION									
	5.0%	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	
	or 95.0%	or 90.0%	or 85.0%	or 80.0%	or 75.0%	or 70.0%	or 65.0%	or 60.0%	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%
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 Spectator 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 or event 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 spectators who visited your community. You would report this in a manner such as the following: *About twenty percent of tourists at NAME EVENT (±6%) would have gone to a different attraction or event in the community if they had not come to NAME EVENT 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										
	5.0%	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	
	or	or	or	or	or	or	or	or	or	
SAMPLE SIZE	95.0%	90.0%	85.0%	80.0%	75.0%	70.0%	65.0%	60.0%	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: SPECTATOR SURVEY: EDITING & SPENDING ALLOCATION

### *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 Spectator Survey Non-Local questionnaire included in these materials. The principles listed below would be applied *separately* for On-Site and Other Spending. (See Section E below, **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 be 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
<b>ON-SITE SPENDING</b>		Assumes at least 50 records in each cell for calculating averages.
Admission	Per Person	Total Spectators
Other on-site tickets/ admissions (special events, concerts, etc. held at the attraction but not included in the general admission price)	Per Person	Total Spectators
Food & beverages at restaurants, fast food outlets, concessions	Per Person	Total Spectators
At lounges, bars, clubs at event	Per Person	Total Spectators
Souvenirs/gift shop purchases	Per Person	Total Spectators
Other shopping/retail	Per Person	Total Spectators
Parking	Per Household Party	Total Spectators

Item	Unit	Type Of Averages To Be Used For Assignment/Allocation of Spending
<b>OTHER SPENDING</b>		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
Recreation/entertainment	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
<b>Domestic Carrier Within Province/Territory/State</b>		
Bus/Train	Per Person	Total Domestic For Domestic Residents; Total Non-Domestic For All Other
Air Carrier/Boat/Ship	Per Person	Total Non-Local
<b>Domestic Carrier To Province/Territory/State</b>		
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, use "per person" in lieu of "per person per night".		

### F. Spectator 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	
<b>Local &amp; Non-Local Spectators</b>	
All On-Site spending	Assign to "Local Community"
<b>Non-Local</b>	
Gasoline/repairs for vehicle	<b>These Rules Override Respondents' Assignments:</b> <b>Same-Day Trip:</b> If resident of province/territory: Assign To Place of Residence If other non-local: Divide evenly between "local community" and "other part of province/territory" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Vehicle rental	<b>These Rules Override Respondents' Assignments:</b> <b>Same-Day Trip:</b> If resident of province/territory: Assign To Place of Residence If other non-local: Divide evenly between "local community" and "other part of province/territory" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Parking	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Local taxis, local buses, subways	<b>Same-Day Trip:</b> Divide evenly between "Local Community" and Place of Residence (e.g., Other Part of Province/territory OR Other Province/territory) <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Groceries (at grocery stores)	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Food & beverages at restaurants	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
At lounges, bars, clubs	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Clothing	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Lodging	<b>Overnight Trip:</b> Divide according to the ratio of <b>paid</b> accommodation nights spent in Local Community/ Other Part of Province/territory
Recreation/entertainment	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Other shopping	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Any Other Expenses	<b>Same-Day Trip:</b> Assign to "Local Community" <b>Overnight Trip:</b> Divide according to ratio of nights spent in Local Community/ Other Part of Province/territory
Domestic Carrier Fares (Plane, Train, Bus, Ship)	<b>These are special rules for domestic carrier fares.</b> If resident of province/territory: 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 Event Account**

	% of Spending to Be Assigned to . . . Account	
	Event's Community Account	Event's "Other Part" of Provincial/ Territorial/State Account
<b>Substitution Effect</b>		
"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 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	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 Expenditures On Basis Of "Importance" Question for Other Spending
<b>All Other Attendees</b>		
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 Expenditures On Basis Of "Importance" Question

## APPENDIX V: 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 when approached.

**Introduction** Hi, my name is XXXX INTERVIEWER’S FIRST NAME. Welcome to NAME EVENT. I’d like to ask you just a few questions so we can learn more about who is coming to this event. (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. Have you already been stopped to answer questions about NAME EVENT *today*?  
No [ ]  
Yes [ ] IF YES, THANK RESPONDENT & TERMINATE

2. Is XXXX (NAME CITY/TOWN IN WHICH EVENT IS TAKING PLACE) 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 event has defined to be the “local area”.

3-a) **IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF EVENT, 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 \_\_\_\_\_  
Country \_\_\_\_\_  
IF CANADA/USA: Postal/Zip Code \_\_\_\_\_

3-b) **IF RESPONDENT LIVES OUTSIDE CITY/TOWN OF EVENT, 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 EVENT 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 a member of the event staff, a vendor, or volunteer to help with today's event, as a participant (an athlete or part of an athlete's staff such as a coach, trainer, or physician), an official (e.g., referee or judge), or as a media representative/crew assigned to cover this event? RECORD # OPPOSITE APPROPRIATE CATEGORY. FOR EACH "EXCLUDED CATEGORY" (\*ed): IF ALL PARTY MEMBERS ARE "EXCLUDED", RECORD ON TALLY SHEET & TERMINATE<sup>24</sup>

CODE	#
*A Event Staff	_____
*B Vendor/merchant	_____
*C Volunteer	_____
D Participant (athlete/staff/officials)	_____
E Media (reporters, crew, etc.)	_____

**6.** Which type of ticket(s) did you use today to enter NAME EVENT? [OPTIONAL, depends on circumstances of Event. See Tally Procedures]

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

**7-a)** IF MULTI-DAY EVENT: NAME EVENT lasts for X days. Over the full course of the event, on how many different days have you/do you plan to attend, counting today's visit?

WRITE IN NUMBER OF DAYS \_\_\_\_\_

DON'T KNOW/CAN'T ESTIMATE [ ]

**RECRUITING FOR SPECTATOR SURVEY**

**8-a)** IF MULTI-DAY EVENT: 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 event?

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









## APPENDIX VI: SAMPLE SPECTATOR SURVEY QUESTIONNAIRES (NON-LOCAL & LOCAL VERSIONS)

### NON-LOCAL VERSION

#### INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE

<b>Who should complete this survey?</b>	An adult on the trip that included a visit to NAME EVENT who is <b>most able to report on spending and activities</b> for <i>all</i> people in this household who went on the trip.
<b>Why is the survey important?</b>	Information you provide will help NAME EVENT organizers plan for future events and demonstrate the benefits the event brings to the community and to people like yourself.
<b>Is the information I provide kept confidential?</b>	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.
<b>Who can I call to verify the legitimacy of the survey?</b>	Here is a number you can call if you have any questions or wish to verify the legitimacy of the survey (INSERT PHONE NUMBER)
<b>What do I do with the completed survey?</b>	There are “drop off” boxes at each gate or mail it back to us in the postage paid envelope we have provided. The cut-off date for processing returns is <b>Day-Month-Year</b> .
<b>Freedom of Information</b>	To be inserted based on regulations in your jurisdiction.
<b>What is the “local” area or “community”?</b>	Please refer to the <b>map</b> included in this questionnaire to identify the boundaries of the “local community” when answering questions about where you spent nights and money.
<b>What is “on-site” spending?</b>	By “on-site” (spending), we mean within the event’s immediate area. For example, if you parked at the event’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”.
<b>What if I have more than one copy of the questionnaire?</b>	Complete only ONE questionnaire for the <b>entire trip</b> that included one or more visits to NAME EVENT.
<b>What if my trip is not over yet?</b>	If your trip is not over, please provide your best estimate of how much money you will spend at NAME EVENT for <i>all</i> your visits to the event and on the <b>entire trip</b> .  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 EVENT SITE’S COMMUNITY (“LOCAL”) AND THE BALANCE OF THE PROVINCE FOR WHICH YOU PLAN TO ESTIMATE THE TOURISM ECONOMIC IMPACT.**

NON-LOCAL VERSION	Stint ID: _____ Unique ID: _____ (PRE-PRINT A UNIQUE NUMBER ON EACH SPECTATOR SURVEY BEFORE DISTRIBUTION. RECORD THIS NUMBER ON TALLY SHEET WHEN THE QUESTIONNAIRE IS HANDED OUT.)																																							
<b>ABOUT YOUR TRIP (EVERYONE ANSWERS)</b>																																								
WHERE DO YOU LIVE? (Write in) City/Town _____ Province _____ Country _____ IF CANADA/USA: Postal/Zip Code _____	MAIN DESTINATION OF TRIP (Write in) City/Town _____ Province _____ Country _____																																							
<b>HOUSEHOLD MEMBERS ON TRIP</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"></td> <td style="width: 10%; text-align: center;">1</td> <td style="width: 10%; text-align: center;">2</td> <td style="width: 10%; text-align: center;">3</td> <td style="width: 10%; text-align: center;">4</td> <td style="width: 10%; text-align: center;">5</td> <td style="width: 10%; text-align: center;">6</td> <td style="width: 10%; text-align: center;">Other</td> </tr> <tr> <td>Total (including yourself)</td> <td></td><td></td><td></td><td></td><td></td><td></td><td style="text-align: center;">WRITE IN</td> </tr> </table> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"></td> <td style="width: 10%; text-align: center;">0</td> <td style="width: 10%; text-align: center;">1</td> <td style="width: 10%; text-align: center;">2</td> <td style="width: 10%; text-align: center;">3</td> <td style="width: 10%; text-align: center;">4</td> <td style="width: 10%; text-align: center;">5</td> <td style="width: 10%; text-align: center;">Other</td> </tr> <tr> <td>Number under 18 years</td> <td></td><td></td><td></td><td></td><td></td><td></td><td style="text-align: center;">WRITE IN</td> </tr> </table>		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	NIGHTS AWAY FROM HOME ON ENTIRE TRIP  NONE _____  Number of nights you plan to be away from home on entire trip _____ nights							
	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																																	
<b>IF ANY NIGHTS AWAY FROM HOME</b>	<b>EVERYONE ANSWERS</b>																																							
LODGING NIGHTS (have or plan to spend in each location before returning home from trip) <table style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: center;">[NAME LOCAL COMMUNITY]</td> <td style="width: 20%; text-align: center;">Other Parts of [NAME PROVINCE]</td> </tr> <tr> <td></td> <td style="text-align: center;"># of nights</td> <td style="text-align: center;"># of nights</td> </tr> <tr> <td>Hotel, resort, lodge, etc.</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Motel</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>B&amp;B</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Campground/RV Park</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Other paid lodging</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Private home or cottage (unpaid)</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Other unpaid lodging</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> </table>		[NAME LOCAL COMMUNITY]	Other Parts of [NAME PROVINCE]		# of nights	# of nights	Hotel, resort, lodge, etc.	_____	_____	Motel	_____	_____	B&B	_____	_____	Campground/RV Park	_____	_____	Other paid lodging	_____	_____	Private home or cottage (unpaid)	_____	_____	Other unpaid lodging	_____	_____	MAIN TYPE OF TRANSPORTATION (Type used to travel greatest distance on trip) <table style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 70%;">Auto/truck/motorhome</td> <td style="width: 30%; text-align: center;">[ ]</td> </tr> <tr> <td>Inter-city bus</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Train</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Airplane</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Boat/ship</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Other</td> <td style="text-align: center;">[ ]</td> </tr> </table>	Auto/truck/motorhome	[ ]	Inter-city bus	[ ]	Train	[ ]	Airplane	[ ]	Boat/ship	[ ]	Other	[ ]
	[NAME LOCAL COMMUNITY]	Other Parts of [NAME PROVINCE]																																						
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Other	[ ]																																							
<b>NUMBER OF DIFFERENT DAYS VISITED/PLAN TO VISIT [NAME EVENT] ON THIS TRIP</b> WRITE IN # OF DAYS _____																																								

EVERYONE ANSWERS	EVERYONE ANSWERS																										
<p><b>HOUSEHOLD MEMBERS WHO WENT TO [EVENT]</b></p> <p>Total (including yourself)      1   2   3   4   5   6   Other  <span style="margin-left: 350px;">WRITE IN</span></p> <p>Number under 18 years      0   1   2   3   4   5   Other  <span style="margin-left: 350px;">WRITE IN</span></p>	<p><b>IMPORTANCE OF EVENT IN DESTINATION CHOICE</b></p> <p>Circle the number below that best describes how important [EVENT] was in your decision to visit [NAME CITY/TOWN OF EVENT] on this trip, where 0 indicates <i>no influence</i> and 10 is that [NAME EVENT] is the <i>main single reason</i> for visiting [NAME CITY/TOWN] on this trip.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 10%;"></td> <td style="width: 10%;">No Influence</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;">Main Reason</td> <td style="width: 10%;">Don't Know</td> </tr> <tr> <td></td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>X</td> </tr> </table>		No Influence										Main Reason	Don't Know		0	1	2	3	4	5	6	7	8	9	10	X
	No Influence										Main Reason	Don't Know															
	0	1	2	3	4	5	6	7	8	9	10	X															
<p><b>SIMILAR RECREATIONAL ACTIVITIES IN COMMUNITY</b></p> <p>If you had <i>not</i> attended [NAME EVENT] on this trip, would you have gone to some other [SIMILAR TYPE OF EVENT] instead? Please refer to the map, if necessary.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 30%;"></td> <td style="width: 35%; text-align: center;">IN [NAME COMMUNITY]</td> <td style="width: 35%; text-align: center;">IN [OTHER PARTS OF PROV/STATE]</td> </tr> <tr> <td>No</td> <td style="text-align: center;">[ ]</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Yes</td> <td style="text-align: center;">[ ]</td> <td style="text-align: center;">[ ]</td> </tr> <tr> <td>Don't Know</td> <td style="text-align: center;">[ ]</td> <td style="text-align: center;">[ ]</td> </tr> </table>		IN [NAME COMMUNITY]	IN [OTHER PARTS OF PROV/STATE]	No	[ ]	[ ]	Yes	[ ]	[ ]	Don't Know	[ ]	[ ]	<p><b>IS THIS TRIP REPLACING A DIFFERENT TRIP?</b></p> <p>Would you have come to [NAME LOCAL COMMUNITY] in the next three months if you had not come at this time for [NAME EVENT]? Please refer to the map, if necessary.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 60%;">No</td> <td style="width: 40%;">[ ]</td> </tr> <tr> <td>Yes</td> <td>[ ]</td> </tr> <tr> <td>Don't Know</td> <td>[ ]</td> </tr> </table>	No	[ ]	Yes	[ ]	Don't Know	[ ]								
	IN [NAME COMMUNITY]	IN [OTHER PARTS OF PROV/STATE]																									
No	[ ]	[ ]																									
Yes	[ ]	[ ]																									
Don't Know	[ ]	[ ]																									
No	[ ]																										
Yes	[ ]																										
Don't Know	[ ]																										
<p><b>WHY YOU ARE AT [NAME EVENT]<sup>25</sup></b></p> <p>Please mark the ONE reason that best explains why you are attending this event.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">As a spectator</td> <td style="width: 20%;">[ ]</td> </tr> <tr> <td>As a participant (e.g., athlete, member of athletes' staff)</td> <td>[ ]</td> </tr> <tr> <td>As a media representative</td> <td>[ ]</td> </tr> <tr> <td>As some other type of official (e.g., referee, judge, etc.)</td> <td>[ ]</td> </tr> </table>	As a spectator	[ ]	As a participant (e.g., athlete, member of athletes' staff)	[ ]	As a media representative	[ ]	As some other type of official (e.g., referee, judge, etc.)	[ ]	<p><b>ANY ATHLETES/ OTHER PARTICIPANTS OR MEDIA IN YOUR TRAVEL PARTY<sup>26</sup></b></p> <p>If any members of your household travel party are in one of the categories listed below, please write in the number for each. If none, please check box.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">NONE OF THE FOLLOWING IN TRAVEL PARTY</td> <td style="width: 20%;">[ ]</td> </tr> <tr> <td>IF ANY, WRITE IN NUMBER BELOW:</td> <td></td> </tr> <tr> <td>Athletes</td> <td style="text-align: right;">_____ #</td> </tr> <tr> <td>Athletic staff (coaches, trainers, physicians, etc.)</td> <td style="text-align: right;">_____ #</td> </tr> <tr> <td>Media representatives (journalists, photographers, crew)</td> <td style="text-align: right;">_____ #</td> </tr> <tr> <td>Officials (e.g., judges, referees, etc.)</td> <td style="text-align: right;">_____ #</td> </tr> </table>	NONE OF THE FOLLOWING IN TRAVEL PARTY	[ ]	IF ANY, WRITE IN NUMBER BELOW:		Athletes	_____ #	Athletic staff (coaches, trainers, physicians, etc.)	_____ #	Media representatives (journalists, photographers, crew)	_____ #	Officials (e.g., judges, referees, etc.)	_____ #						
As a spectator	[ ]																										
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Officials (e.g., judges, referees, etc.)	_____ #																										

SPENDING FOR ALL HOUSEHOLD MEMBERS ON THE TRIP (EVERYONE ANSWERS)
<p>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:</p> <ul style="list-style-type: none"> <li>• Cash, credit cards, debit cards, traveller's cheques.</li> <li>• 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.).</li> <li>• Taxes and tips.</li> </ul> <p><b>Please report your spending in XX currency for you and all other household members on trip with you.</b></p> <p>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.</p> <p>For "OTHER SPENDING" IN [NAME OF LARGEST AREA], please provide the proportion of your spending that was or will be done in [NAME COMMUNITY].</p>

<b>ON-SITE SPENDING AT [NAME EVENT]</b>			<b>OTHER SPENDING IN [NAME OF LARGEST AREA] (excluding ON-SITE spending) See note.</b>		
	<b>Spent Any?</b>	<b>Amount in XX\$ (currency)</b>	<b>Spent Any?</b>	<b>Amount in XX\$ (currency)</b>	<b>Proportion spent/will spend in [NAME COMMUNITY]</b>
Admission to [NAME EVENT] (including tickets purchased in advance)	[ ]	\$_____.00 Don't know	<b>TRANSPORT</b> Gasoline/repairs for vehicle	[ ] \$_____.00 Don't know	_____% Don't know
Other on-site tickets/ admissions (rides, movies, etc. on the event site)	[ ]	\$_____.00 Don't know	Vehicle rental	[ ] \$_____.00 Don't know	_____% Don't know
Food & beverages at restaurants, fast food outlets, concessions	[ ]	\$_____.00 Don't know	Parking	[ ] \$_____.00 Don't know	_____% Don't know
At lounges, bars, clubs	[ ]	\$_____.00 Don't know	Local taxis, local buses, subways	[ ] \$_____.00 Don't know	_____% Don't know
Souvenirs	[ ]	\$_____.00 Don't know	<b>FOOD &amp; BEVERAGES</b> Groceries (at grocery stores)	[ ] \$_____.00 Don't know	_____% Don't know
Other shopping/retail	[ ]	\$_____.00 Don't know	Food & beverages at restaurants	[ ] \$_____.00 Don't know	_____% Don't know
Parking	[ ]	\$_____.00 Don't know	At lounges, bars, clubs	[ ] \$_____.00 Don't know	_____% Don't know
<b>TOTAL</b> Total spent/will spend at [NAME EVENT] site		\$_____.00 Don't know	<b>SHOPPING</b> Clothing	[ ] \$_____.00 Don't know	_____% Don't know
<b>ANY PLANE, TRAIN, INTER-CITY BUS, SHIP TICKETS BOUGHT FOR TRIP?</b> No Yes <b>IF YES:</b> Was that a . . . ? domestic transportation company foreign transportation company			Other shopping	[ ] \$_____.00 Don't know	_____% Don't know
<b>Total spent</b> on transportation tickets for all household members in XX currency (WRITE IN)		\$_____.00	<b>LODGING</b> Lodging (including camping fees)	[ ] \$_____.00 Don't know	_____% Don't know
Don't know			<b>RECREATION</b> Other recreation/ entertainment (excluding EVENT)	[ ] \$_____.00 Don't know	_____% Don't know
			<b>OTHER</b> All other spending (including registration fees/ press passes, etc.)	[ ] \$_____.00 Don't know	_____% Don't know
			<b>TOTAL</b> All spending during planned stay in [NAME LOCATION]	[ ] \$_____.00 Don't know	_____% Don't know



**LOCAL VERSION**  
**INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE**

<b>Who should complete this survey?</b>	An adult who is <b>most able to report on spending</b> for <i>all</i> people in this household who went to NAME EVENT.
<b>Why is the survey important?</b>	Information you provide will help NAME EVENT organizers plan for future events and demonstrate the benefits the event brings to the community and to people like yourself.
<b>Is the information I provide kept confidential?</b>	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.
<b>Who can I call to verify the legitimacy of the survey?</b>	Here is a number you can call if you have any questions or wish to verify the legitimacy of the survey (INSERT PHONE NUMBER)
<b>What do I do with the completed survey?</b>	There are “drop off” boxes at each gate or mail it back to us in the postage paid envelope we have provided. The cut-off date for processing returns is <b>Day-Month-Year</b> .
<b>Freedom of Information</b>	To be inserted based on regulations in your jurisdiction.
<b>What is “on-site” spending?</b>	By “on-site” (spending), we mean within the event’s immediate area. For example, if you parked at the event’s parking facility, you would write in your parking costs under “on-site spending”, but if you parked a few blocks away, you would <i>NOT</i> enter your parking costs.
<b>What if I have more than one copy of the questionnaire?</b>	If you received more than one questionnaire, please complete <b>ONLY</b> one questionnaire for all the days you have or plan to attend NAME EVENT.
<b>What if I don’t know exactly what I/all members of my household spent?</b>	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 EVENT with you throughout <i>all</i> your visits to the event.
<b>What if I plan to come to this event on another day?</b>	If you plan to come to the event again, please provide your best estimate of spending for yourself and all other household members for <i>all</i> your visits to the event including future visits.



<b>LOCAL VERSION</b>		Stint ID: _____ Unique ID: _____ (PRE-PRINT A UNIQUE NUMBER ON EACH SPECTATOR SURVEY BEFORE DISTRIBUTION. RECORD THIS NUMBER ON TALLY SHEET WHEN THE QUESTIONNAIRE IS HANDED OUT.)	
<b>WHERE DO YOU LIVE?</b> (Write in) City/Town _____ Province _____ Country _____ IF CANADA/USA: _____ Postal/Zip Code _____		<b>OVERALL RATING OF EVENT</b> Very _____ Very _____ Don't _____ Unsatisfied _____ Satisfied _____ Know _____ 1 2 3 4 5 6 7 8 9 10 X	
<b>WHY YOU ARE AT [NAME EVENT]<sup>27</sup></b> Please mark the ONE reason that best explains why you are attending this event.  As a spectator [ ] As a participant (e.g., athlete, member of athletes' staff) [ ] As a media representative [ ] As some other type of official (e.g., referee, judge, etc.) [ ]		<b>ANY ATHLETES/ OTHER PARTICIPANTS OR MEDIA IN YOUR TRAVEL PARTY<sup>28</sup></b> If any members of your household travel party are in one of the categories listed below, please write in the number for each. If none, please check box.  NONE OF THE FOLLOWING IN TRAVEL PARTY [ ] IF ANY, WRITE IN NUMBER BELOW: Athletes _____ # Athletic staff (coaches, trainers, physicians, etc.) _____ # Media representatives (journalists, photographers, crew) _____ # Officials (e.g., judges, referees, etc.) _____ #	

ON-SITE SPENDING AT [NAME EVENT] TODAY	RATING OF EVENT FOR VARIOUS CHARACTERISTICS																																																																																				
<p>➤ Please report your spending in XX currency for you and all other household members who came with you to the [EVENT].</p> <p>➤ If you went or plan to go to the event on more than one day, include spending for you and other members of your household for all your visits to the event. Please include your best estimate of what you will spend on future visits to this event.</p> <p>➤ By “on the event site” we mean within the boundaries of the event. If you parked or purchased food, beverages or souvenirs near but not on the site, you would NOT include this spending.</p> <p>➤ Provide your best estimate, including cash, credit cards, debit cards, traveller’s cheques. Include taxes and tips. Please report your spending in XX currency.</p> <p>➤ 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.</p>	<table style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th></th> <th colspan="2" style="text-align: center;">Very Unsatisfied</th> <th colspan="6"></th> <th colspan="2" style="text-align: center;">Very Satisfied</th> <th style="text-align: center;">No Opinion</th> </tr> <tr> <th></th> <th>1</th><th>2</th><th>3</th><th>4</th><th>5</th><th>6</th><th>7</th><th>8</th><th>9</th><th>10</th><th>x</th> </tr> </thead> <tbody> <tr> <td>Food</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Entertainment</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Wait times</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Washrooms</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>Parking</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </tbody> </table> <p><i>Add additional characteristics, if desired.</i></p> <p><b>ATTENDANCE AT [NAME EVENT] IN PAST 3 YEARS</b> (mark all that apply)</p> <p>Never attended before            Attended last year            Attended two years ago            Attended three years ago</p> <p><b>NUMBER OF DIFFERENT DAYS VISITED/PLAN TO VISIT [NAME EVENT]</b>            WRITE IN # OF DAYS _____</p>		Very Unsatisfied								Very Satisfied		No Opinion		1	2	3	4	5	6	7	8	9	10	x	Food												Entertainment												Wait times												Washrooms												Parking											
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<b>ABOUT YOU AND YOUR HOUSEHOLD (OPTIONAL)</b>	
<p><b>YEAR OF BIRTH</b></p> <p>_____</p>	<p><b>GENDER</b></p> <p>Male Female</p> <p><b>HOUSEHOLD COMPOSITION</b></p> <p>All household members 18 years of age or over Any household members under 18 years Any household members under 12 years</p>
<b>THANK YOU!</b>	<b>YOUR CHANCE TO WIN!</b>
<p>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].</p> <p>If you have any questions about this study, please contact: NAME OF CONTACT PERSON PHONE NUMBER</p>	<p>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].</p> <p>Your Name _____ City/Town _____ Province _____ Country _____ IF CANADA/USA: Postal/Zip Code _____</p>

## APPENDIX VII: TOOLS FOR PARTICIPANT & MEDIA STUDIES

### A. Participant & media tourists

#### 1. Introduction

As noted in the main body of these guidelines, study organizers can elect to take special steps to include spending by participant and media tourists who attend the spectator sporting event or not. If no special steps are taken to include these individuals' contribution to the local economy, they would be treated in the same manner as all other *spectators* from a survey perspective. This approach corresponds to **Option 4**.

In essence, it would be assumed that athletes and members of their staff such as coaches, trainers, and physicians and officials such as judges and referees; and media representatives will *also* be spectators at some time during the course of the event and would contribute to spending in the community and other parts of the province in *the same* manner as other spectators.

Three approaches to taking special steps to capture the economic contribution of participant and media representative tourists attending the sporting event are provided in these guidelines (Options 1, 2, 3). General guidance and prototype materials for implementing these approaches are provided in this Appendix.

#### 2. Participants & media representatives who are *tourists*

As with spectators, participants and representatives of the media representatives who are *tourists* are the primary focus of these guidelines (see Section II-B-3 for definitions of *tourism*). It is the spending by these *out-of-town* athletes and their staffs, and media representatives who have come to the community because the sporting event is taking place that contribute to the *tourism* economic impact of the event.

For this reason, the procedures described here do not take into account athletes, staff or media representatives who live in the local community (*locals*).

#### 3. Options for measuring tourism spending by participants and media representatives

Three options are provided for determining the tourism spending by participants and media representatives at a spectator sporting event.

##### **Option 1: Average spending based on spectators**

The simplest approach to estimating tourism spending by participants and media representatives involves obtaining a count of all such individuals at the event who live outside the local community. Using average spending estimates derived from the **Spectator Study**, you would calculate the approximate amount of money participants and/or media representatives would spend in the community. After adjusting for potential duplication of these individuals in your

spectator sample, you would add the calculated spending for participants and media representatives to the adjusted estimates of **spectators' tourism spending** associated with the event (*incremental spending*) from the spectator study.

(Optional) For additional precision in the estimates, information from event organizers could include the number of days participants/media representatives spent in the community for the event. In turn, averages would be calculated on a per-person-per-day basis and applied to the total number of days (nights) the target groups were in the community. The same procedures would be applied to tourism spending estimates for "other parts of the province".

### **Option 2: Spending estimates provided by event organizers**

A somewhat more complex approach is to provide Event Organizers with a set of forms to complete. These forms would include questions about the number and place of residence of participants and/or media representatives, types of accommodation used by length of stay in the community and other parts of the province, fees associated with attending the event and other details about spending in the community/other parts of the province. Based on the information provided by Event Organizers, you would calculate tourism spending associated with the event for participants and/or media representatives and add these estimates to those derived from the Spectator Study, adjusting for duplication as required.<sup>29</sup>

### **Option 3: Stand-alone studies of participants/media representatives**

The most complex approach is to design a stand-alone study for participants and/or media representatives. This approach entails developing a customized questionnaire and sampling plan to obtain details about the participant/media representative, his/her trip and stay in the local community. The sampling unit for these stand-alone studies can be key contacts for the participants/media representatives (e.g., coaches, managers, media organizations) or individual participants or media representatives at the event. In either case, you will likely require the cooperation of event organizers to provide you with the information you require to build the sampling frame for these stand-alone studies (e.g., lists of contact people and/or individuals and access to them).

In turn, "access" might be in-person on the site of the event or as a follow-up study once the event is over. In the latter case, you would require mailing addresses, email addresses and/or telephone numbers.

This approach is not recommended for most spectator sporting events because of its complexity, demands on resources and potentially low cooperation rates from the target groups. If, however, study organizers elect to implement stand-alone studies of participants and/or media representatives, the basic principles for sampling, counting, tallying, surveying, weighting and projection described in the main body of these guidelines could be adapted for these stand-alone studies.<sup>30</sup>

## **B. Average spending based on a spectator study – Option 1**

### **1. Overview of the process**

The basic steps in the proposed approach are as follows:

- From event organizers, obtain a count of all individuals who have come to **participate** in or cover the event for a **media** organization or as a freelancer;
- Conduct a Spectator Study, as described in the main body of these guidelines.
- Using average spending estimates derived from the **Spectator Study** on a per person category-by-category basis, estimate the approximate amount of money participants and/or media representatives spent in the community. Special adjustments may be required. For example, if you know that all athletes stay in private homes or dormitories, the average estimates you use from the Spectator Study should be those from people who use similar types of lodging in the community.
- Repeat the steps described above for spending in “other parts of the province”.
- Adjust for potential duplication of these individuals’ spending in your spectator sample.
- (Optional) As a further refinement to take into account potentially longer stays in the community by participants and/or media representatives than by typical spectators, you can perform the calculations described above based on *per-person-per-day* rather than *per person*. To add this enhancement, you would need to estimate the approximate number of days (nights) participants and/or media representatives would spend in the community and other parts of the province because the event is taking place. This information may be available from event organizers.<sup>31</sup>
- Add the calculated spending for participants and media representatives to the estimates of spectator spending associated with the event (adjusted for duplication) and assign this spending to the appropriate administrative unit (*local community* or *other parts of the province*), following the procedures described in these guidelines for the Spectator Study.
- For participants and media representatives, no further adjustments are required to identify the *portion* of spending associated with the event. In the case of these out-of-town visitors, *all* spending in the community is deemed incremental – spending that would not have taken place had the event not occurred.

### **2. Apply standard weighting and projection procedures to spectator study**

In Chapter V of the main body of these guidelines (*Weighting and Projection Plan for Counts and Tallies*), procedures are described to *exclude* from final estimates individuals in special categories such as staff, volunteers, etc. No adjustments to the procedures described in Chapter V are required if you plan to include participants and/or media representatives as they

occur in your sample of spectators (Option 4). If, however, you plan to use other options, you will have to remove spending by participants/media representatives from the Spectator Survey data (see following sections).

### 3. Adjustments are required for spending but not for people

Some out-of-town participants and media representatives will likely be included in your sample of spectators. They will, therefore, be included in your “counts”, “tallies”, and official estimates of total “spectators” at the event. If you were to add all participants and/or all media representatives to your estimate of total spectators, some people would be counted more than once. Because the procedures required to take potential duplication of people into account are quite complex, it is recommended that you report only total “spectators” at the event, based on the steps outlined in the main body of these guidelines. You would not, therefore, add estimates of the number of participants, media representatives and spectators together. In other words, you would **not** adjust for people who are both *spectators* and *participants* (or *media representatives*).<sup>32</sup>

For total tourism spending, however, **special steps are required** to remove spending for participants and/or media representatives that has been included in estimates reported for a household travel party in the Spectator Study. The spending you “remove” from the spectator survey will form the basis of your estimates of spending by participants and/or media representatives, as described in the following steps if you are using Option 1.

For Option 1, spending identified as being done for/on behalf of participants or media representatives will be removed from the Spectator Study. This spending will, in turn, form the basis of estimating total participant/media representative spending, using the number of participants/media representatives provided to you by the event organizer. If you were using Options 2 or 3, you would also remove this spending from the Spectator Study and set it aside. The spending estimate provided to you in the Event Organizer Form (Option 2) or the stand-alone study (Option 3) would be used to estimate total participant (or media representative) spending.

#### 4. Estimating average spending for participants/media representatives

In the example provided here, the focus is out-of-town *participants*. If you were attempting to estimate tourism spending by out-of-town *media representatives*, you would repeat these steps for media representatives.

Once your Spectator Survey has been completed, you would identify *each* questionnaire in which at least one of the members of the household travel party is a *participant* in the event. If adjustments for allocation or ascription of spending to categories is required in the Spectator questionnaire, these procedures must be completed **before** you implement the steps described below (see Appendix IV). The procedures you follow in Step 1 are applied to *individual questionnaires*, one by one.



**a) Step 1-a: remove participant/media spending from household travel party spending in community**

This step is performed on a record-by-record basis, for each Spectator Survey that includes at least one "participant" or "media representative" as part of the household travel party. In the example, the record represents a three-person travel party that includes one (1) participant.

<b>Step 1-a: Remove Participant/Media Spending from Household Travel Party Spending in Community</b>				
Category of Spending (include on-site and other spending)	For Options 1, 2, 3			For Use in Participant Portion for Option 1/Set Aside for Options 2, 3 <sup>33</sup>
	Total From Completed Questionnaire (A)	Spending Per Person (B)	Retained in "Spectator Only" Portion (C)	
Gasoline/repairs for vehicle	\$150.00	\$50.00	\$100.00	\$50.00
Vehicle rental	\$45.00	\$15.00	\$30.00	\$15.00
Parking	\$15.00	\$5.00	\$10.00	\$5.00
Local taxis, local buses, subways	\$25.00	\$8.33	\$16.67	\$8.33
Groceries/beverages (at grocery/liquor stores)	\$200.00	\$66.67	\$133.33	\$66.67
Food & beverages at restaurants	\$450.00	\$150.00	\$300.00	\$150.00
At lounges, bars, clubs	\$95.00	\$31.67	\$63.33	\$31.67
Recreation/ entertainment (including admission/other activities at EVENT)	\$300.00	\$100.00	\$200.00	\$100.00
Clothing	\$350.00	\$116.67	\$233.33	\$116.67
Other shopping	\$300.00	\$100.00	\$200.00	\$100.00
Paid Lodging (Hotel, motel, B&B, Campground, Other Paid)	\$700.00	\$233.33	\$466.67	\$233.33
Unpaid Lodging (Private homes, other unpaid)	\$0.00	\$0.00	\$0.00	\$0.00
Domestic Bus/Train	\$0.00	\$0.00	\$0.00	\$0.00
Domestic Air Carrier	\$0.00	\$0.00	\$0.00	\$0.00
Any Other Expenses (including registration fees, press passes, etc.)	\$200.00	\$66.67	\$133.33	\$66.67
Calculations displayed for "Other Expenses":		$A \div 3$ [Total in HH Travel Party] $\$200.00 \div 3 =$ $\$66.67$ per person	$A - (B * 1)$ [Number of <b>Participants</b> in HH Travel Party] $\$200.00 - (\$66.67 * 1) =$ $\$133.33$	$B * 1$ [Number of <b>Participants</b> in HH Travel Party] $\$66.67 * 1 = \$66.67$

**b) Step 1-b: remove participant/media spending from household travel party spending in other parts of province**

Repeat as per Step 1-a, for spending in other parts of the province.

**c) Step 2-a: average spending in local community by surveyed participants (Option 1 only)**

In Step 2, record-by-record estimates of per participant spending generated in Step 1 are combined to generate an *average spending* for out-of-town participants that were identified as part of the Spectator Survey. In this example, we display five individual records. When you perform the calculations, you would use *all* records in which a participant was identified among household travel party members.

<b>Step 2-a: Average Spending in Local Community by Surveyed Participants</b>							
Individual Records with Participants from Spectator Survey	<b>Participant Portion of Spending in Local Community (from Step 1-a)</b>					<b>Participant Spending from Spectator Survey</b>	
	1	2	3	4	5	<b>Total (E)</b>	<b>Average Per Participant (F)</b>
Gasoline/repairs for vehicle	\$50.00	\$25.00	\$0.00	\$38.33	\$33.33	\$146.66	\$29.33
Vehicle rental	\$15.00	\$12.00	\$0.00	\$0.00	\$10.00	\$37.00	\$7.40
Parking	\$5.00	\$0.00	\$0.00	\$5.00	\$3.33	\$13.33	\$2.67
Local taxis, local buses, subways	\$8.33	\$3.67	\$0.00	\$0.00	\$5.56	\$17.56	\$3.51
Groceries/beverages (at grocery/liquor stores)	\$66.67	\$60.00	\$0.00	\$45.00	\$44.44	\$216.11	\$43.22
Food & beverages at restaurants	\$150.00	\$35.00	\$75.00	\$189.00	\$100.00	\$549.00	\$109.80
At lounges, bars, clubs	\$31.67	\$40.00	\$34.00	\$58.00	\$21.11	\$184.78	\$36.96
Recreation/ entertainment (including admission/other activities at EVENT)	\$100.00	\$86.00	\$59.00	\$42.00	\$66.67	\$353.67	\$70.73
Clothing	\$116.67	\$0.00	\$24.00	\$64.00	\$77.78	\$282.45	\$56.49
Other shopping	\$100.00	\$0.00	\$50.00	\$58.00	\$66.67	\$274.67	\$54.93
Paid Lodging (Hotel, motel, B&B, Campground, Other Paid)	\$233.33	\$0.00	\$80.00	\$155.56	\$210.00	\$678.89	\$135.78
Unpaid Lodging (Private homes, other unpaid)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Domestic Bus/Train	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Domestic Air Carrier	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$200.00	\$40.00
Any Other Expenses (including registration fees, press passes, etc.)	\$66.67	\$145.00	\$0.00	\$44.44	\$44.44	\$300.55	\$60.11
Calculations displayed for "Other Expenses"						E = Sum of participant portion of spending from all Spectator Survey questionnaires (e.g., $\sum$ columns 1 . . . 5, etc.)	[E ÷ total participants identified in Spectator Survey questionnaires] In this example, there were 5 participants identified. [ $\$300.55 \div 5 = \$60.11$ ]

**d) Step 2-b: average spending in other parts of province by surveyed participants (Option 1 only)**

Repeat as per Step 2-a, for spending in other parts of the province.

**e) Step 3-a: total spending in community for all participants (Option 1 only)**

To perform Step 3, you require an estimate of the total number of out-of-town participants at the event over its full duration. This information should be available from event organizers. You would multiply the number of out-of-town participants at the event by the average per participant for each spending category.

All of out-of-town participants' spending is assumed to be attributable to the event (100%). In the example shown below, event organizers reported that there were 350 out-of-town participants at the event.

<b>Step 3-a: Total Spending in Community by All Participants</b>				
	Average Per Participant (F from Step 2)	Total Number of Out-of-Town Participants Reported by Event Organizers	Total	Attributable to Event (100%)
Gasoline/repairs for vehicle	\$29.33	350	\$10,266.20	\$10,266.20
Vehicle rental	\$7.40	350	\$2,590.00	\$2,590.00
Parking	\$2.67	350	\$933.10	\$933.10
Local taxis, local buses, subways	\$3.51	350	\$1,229.20	\$1,229.20
Groceries/beverages (at grocery/liquor stores)	\$43.22	350	\$15,127.70	\$15,127.70
Food & beverages at restaurants	\$109.80	350	\$38,430.00	\$38,430.00
At lounges, bars, clubs	\$36.96	350	\$12,934.60	\$12,934.60
Recreation/ entertainment (including admission/other activities at EVENT)	\$70.73	350	\$24,756.90	\$24,756.90
Clothing	\$56.49	350	\$19,771.50	\$19,771.50
Other shopping	\$54.93	350	\$19,226.90	\$19,226.90
Paid Lodging (Hotel, motel, B&B, Campground, Other Paid)	\$135.78	350	\$47,522.30	\$47,522.30
Unpaid Lodging (Private homes, other unpaid)	\$0.00	350	\$0.00	\$0.00
Domestic Bus/Train	\$0.00	350	\$0.00	\$0.00
Domestic Air Carrier	\$40.00	350	\$14,000.00	\$14,000.00
Any Other Expenses (including registration fees, press passes, etc.)	\$60.11	350	\$21,038.50	\$21,038.50
Calculations displayed for "Other Expenses"			F * 350 (Total Out-of-Town Participants at Event) [\$60.11 * 350 = \$21,038.50]	

**f) Step 3-b: Total spending in other parts of the province for all participants (Option 1 only)**

Repeat as per Step 3-a, for spending in other parts of the province.

**g) Step 4: Combining spectator and participant spending in event account (Options 1, 2, 3)**

You would follow all the procedures described in the main body of these guidelines for estimating the *Event Account* for spectators, using the spending estimates that exclude participants' spending (as described earlier in this appendix). Once you have incremental spending by spectators, you would add to these amounts on a category-by-category basis, the estimates produced in Steps 1 – 3, above for out-of-town participants if you are using Option 1.

If you were using Options 2 or 3, you would add spending derived from Event Organizers' forms (Option 2) or the stand-alone participant/media representative studies you conducted (Option 3).

**h) Step 5: Assigning total spending in event account to geographic areas (Options 1, 2, 3)**

Following the procedures described in Chapter VII, Section E of these guidelines, you would assign event account spending to geographic areas. At this stage, your estimates are ready for input into the tourism economic impact model you are using.

**C. Spending estimates provided by event organizers – Option 2**

**1. Overview of the process**

The basic steps in the proposed approach are as follows:

- Customize the Event Organizer Form provided in this section to meet the characteristics of your event.
- Distribute the form(s) to event organizers and, if necessary, follow-up to obtain completed forms;
- Conduct a Spectator Study, as described in the main body of these guidelines;
- Isolate and remove tourism spending by participants/media representatives from the Spectator Study, as described above for Option 1;
- Add the spending for participants and/or media representatives from the Event Organizer forms to the estimates of spectator spending associated with the event (adjusted for duplication) and assign this spending to the appropriate administrative unit (*local community* or *other parts of the province*), following the procedures described in these guidelines for the Spectator Study.
- If Event Organizer forms are incomplete or do not meet basic reality checks, you may have to adjust estimates of tourism spending by participants/media representatives, using other sources and special calculations.
- For participants and media representatives, no further adjustments are required to identify

the *portion* of spending associated with the event. In the case of these out-of-town visitors, *all* spending in the community is deemed incremental – spending that would not have taken place had the event not occurred.

## 2. Event organizer cover letter/forms

A sample cover letter and event organizer form are provided below. You would customize these forms to meet your event's needs. You can also adjust the wording so that similar forms are available for athletes and associated staff (used in the example provided) and media representatives.

The following information might be included in the cover letter that accompanies forms for event organizers. Ideally, you would obtain the name, title, and mailing address of the most appropriate person associated with the event and address the cover letter to him/her.

### Sample Cover Letter

Dear [NAME OF EVENT ORGANIZATION REPRESENTATIVE]:

XXXX is conducting a study to estimate the tourism economic impact of NAME EVENT in NAME COMMUNITY. To ensure that we capture information about spending in the community and province by athletes and associated staff (e.g., coaches, managers, trainers, therapists, physicians, etc. that travel with the athletes) and officials (e.g., referees, judges, etc.) we require your assistance.

Please take a few minutes to provide us with as much of the information requested in these forms as you can. The more complete and accurate the information you provide, the more reliable our estimates of the economic benefits NAME EVENT brings to our community will be. Provide as much detail as you can. Where necessary, provide your *best estimates* of the information requested. If some other person in your organization is better able to provide the requested information, please pass the form on to him/her.

All information collected in these forms will be used only for statistical analysis. Your responses are never associated with your organization and all information you provide is confidential and anonymous.

Here is a number you can call if you have any questions or wish to verify the legitimacy of the tourism economic impact project [INSERT PHONE NUMBER].

When you have completed the form, please mail [or email or fax] it back to us [in the postage paid envelope we have provided/ email to the following address [INSERT EMAIL ADDRESS] or fax the completed forms to [INSERT FAX NUMBER]. The deadline for receiving forms is [INSERT DAY/MONTH/YEAR].

Thank you in advance for your cooperation!

Sincerely yours,

### Event Organizer's Form(s)

**HOW TO CONTACT YOU**

Your first/last name (please print) \_\_\_\_\_ / \_\_\_\_\_  
 Daytime telephone number: ( ) \_\_\_\_\_  
 Email address (please print): \_\_\_\_\_

**NUMBER OF ATHLETES/ASSOCIATED STAFF/OFFICIALS BY PLACE OF RESIDENCE**

Please indicate the number of athletes/associated staff and officials for whom you are reporting information, by their usual place of residence.

<b>Place of Residence</b>	<i>Write in Number</i>
NAME LOCAL	_____
COMMUNITY	_____
Other parts of NAME PROVINCE	_____
Other parts of Canada	_____
USA	_____
Other countries	_____

**Number of Nights Spent in NAME/COMMUNITY/ OTHER PARTS OF PROVINCE**

Please indicate how many athletes/associated staff and officials used the types of lodging listed below and the approximate number of nights they spent in each type. See note for more information on lodging types.<sup>34</sup> The duration of people's stay in the local area or other parts of the province should include time spent acclimatizing / practicing under local conditions, additional vacation time (if known), etc.

*If no athletes/associated staff/officials used one of the types of lodging listed below, please write in "0".*

	Number of People	Number of nights in lodging type in NAME COMMUNITY	Number of nights in lodging type in other parts of NAME PROVINCE
Hotel/Motel	_____ # → Don't Know [ ]	_____ # Don't Know [ ]	_____ # Don't Know [ ]
Dormitories (if fees charged)	_____ # → Don't Know [ ]	_____ # Don't Know [ ]	_____ # Don't Know [ ]
Other paid lodging	_____ # → Don't Know [ ]	_____ # Don't Know [ ]	_____ # Don't Know [ ]
Unpaid lodging	_____ # → Don't Know [ ]	_____ # Don't Know [ ]	_____ # Don't Know [ ]

**SPENDING BY OR MONEY SPENT ON BEHALF OF ATHLETES/ASSOCIATED STAFF/OFFICIALS TO ATTEND [NAME EVENT]**

Provide your best estimate for the entire duration of athletes/associated staff/officials' trip to NAME EVENT. Please include the following:

- Cash, credit cards, debit cards, travellers' cheques.
- Items included in registration fees or travel packages that may have been used for goods or services on this trip (such as lodging, admission to attractions or events, meals, vehicle rental including bus rentals, airfare or bus fare, etc.).
- Taxes and tips.

Please report spending in XX currency, including money individuals spent and money that was spent on their behalf by members of their household, sponsors, sports or other organizations to attend this event.

Please provide the proportion of spending that was or will be done in [NAME COMMUNITY].

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. **Everyone** should complete the "Total Amount" at the end of the list.

ALL SPENDING ASSOCIATED WITH [NAME EVENT]				ANY PLANE, TRAIN, INTER-CITY BUS, SHIP TICKETS BOUGHT FOR TRIP?	
	Spent Any?	Amount in XX\$ (currency)	Proportion spent/will spend in [NAME COMMUNITY]		
<b>GROUND TRANSPORTATION</b>					
Gasoline/repairs for vehicle	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	No	[ ]
Vehicle rental (including bus rental)	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Yes	[ ]
Parking	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	<b>IF YES: Was that a . . . ?</b>	
Local taxis, local buses, subways	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Canadian transportation company	[ ]
<b>FOOD &amp; BEVERAGES</b>					
Groceries (at grocery stores)	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	foreign transportation company	[ ]
Food & beverages at restaurants	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	<b>Total spent</b> on transportation tickets in XX currency (WRITE IN)	
At lounges, bars, clubs	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	\$_____00	
<b>SHOPPING</b>					
Clothing	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Don't know [ ]	
Other shopping	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	<b>SUMMARY</b>	
To help us with some of our calculations, please provide your best estimate for each of the items listed below.					
<b>LODGING</b>					
Lodging	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Total <b>number</b> of athletes/associated staff/officials at the event over the full duration of the event (excluding event employees)	
<b>FEES</b>					
Registration fees for event	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	_____ people (total)	
Other fees for event	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Total <b>number</b> of athletes/associated staff/officials at the event over the full duration of the event (excluding event employees) <b>who live outside NAME LOCAL COMMUNITY</b>	
<b>RECREATION</b>					
Admissions/tickets to NAME EVENT (as a spectator)	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	_____ people from outside local community	
Other recreation/entertainment (excluding EVENT)	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	Average <b>number of nights</b> spent in NAME COMMUNITY by "typical" athlete/associated staff/official	
<b>OTHER</b>					
All other spending	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	_____ average # of nights in other parts of NAME PROVINCE	
<b>TOTAL</b>					
All spending associated with trip to NAME EVENT	[ ]	\$_____00 Don't know [ ]	_____% Don't know [ ]	_____ average <b>total amount spent</b> by athletes/associated staff/official <b>to attend event</b> (including lodging, meals, registration, other fees, etc. but <i>excluding</i> transportation to NAME COMMUNITY) \$_____00 per person	
				Average amount spent by athletes/ associated staff on commercial transportation fares – <b>Canadian transportation companies</b> \$_____00 per person	
				Average amount spent by athletes/ associated staff on commercial transportation fares – <b>foreign transportation companies</b> \$_____00 per person	

**Thank you for your cooperation. Please return this form to [PROVIDE NAME/MAILING/EMAIL ADDRESS OR FAX NUMBER, AS APPROPRIATE]**

### **3. General advice about Event Organizer forms**

#### ***a) Re-contact event organizers***

Even though they may be the “best” source of information on spending by participants and/or media representatives, event organizers may not know the answers to all the questions contained in the form, may leave important questions blank or not return the form to you at all.

You should attempt to contact the event organizer and ask him/her to provide you with a best estimate of missing information. You should also encourage those who do not return the form at all to do so, perhaps by reminding event organizers of the importance of having a reliable estimate of their tourism economic impact of the event.

#### ***b) Do the best you can with information provided***

A variety of factors will influence the completeness and accuracy of the information you obtain from event organizers. Everything from legibility to time pressures or lack of knowledge about participant/media representatives' stay in the community and spending patterns will impact the quality of the estimates generated from the Event Organizer form.

You will have to do the best you can with the information provided to you. In some cases, you may be better off relying on average category spending by out-of-town spectators that you have captured in a Spectator Study as surrogates for spending by participants and/or media representatives than using the information provided in the form (if it is too incomplete, etc.).<sup>35</sup>

#### ***c) Perform “reality checks”***

You may wish to seek advice from tourism businesses and/or economic development officials in your area to determine if the information provided by event organizers “rings true” to costs of tourism goods and services in your community. You might also compare the average spending estimates provided by an event organizer with those obtained in your Spectator Study for tourists from similar origins.

Statistics Canada offers another source of annual information on tourism spending by visitors to locations throughout Canada from different parts of the world. These estimates are available from Tourism British Columbia and the British Columbia Ministry of Tourism, Sport and the Arts.<sup>36</sup>



If the results of your “reality checks” are very different from the information contained in the Event Organizer form, you may have to make some judgement calls, based on as much factual information as you can obtain (e.g., room rates for lodging in the community during the event, average restaurant meal costs, etc.). You may, for example, use estimates of the number of participants from the Event Organizer form and apply this information to average spending estimates from other sources to arrive at the total spending by category you will use in the tourism economic impact process.

**d) Using “total” and/or “summary” information**

If you obtain only “total” spending rather than detailed spending information from event organizers, you may have to rely on ratios generated from the Spectator Study to distribute the *total* to the various categories of spending listed in the form. Refer to Appendix IV of these guidelines for advice on how to generate and apply these ratios.

**Summary** information is included in the Event Organizer Form so you have at least *some* information on which to build a participant or media representative account if the Event Organizer provides you with *no* spending information and/or does not fully complete the lodging section of the form. Again, you may have to refer to average spending estimates from the Spectator Study or other sources of tourism spending as surrogates for participants or media representatives if insufficient information is provided in the Event Organizer form.

Where possible, you should use average spending estimates from the Spectator Study that match the place of residence of the participants/media representatives for whom you must make adjustments because of missing information in the Event Organizer form. If you have identified sufficient *participants* in the Spectator Study to rely on these estimates (by place of residence), you would do so. If, however, too few participants have been included in your Spectator Study to generate reliable average spending estimates, you might use averages based on *all spectators* (participants and non-participants). Generally, it is advised that you use averages based on at least fifty completed questionnaires.

Whenever you are making adjustments to information provided in the Event Organizer Form, it is important to separate nights/spending in the local community and in the balance of the province.

**e) Document your adjustments**

Documentation of sources and decisions you make when determining what tourism spending estimates you will use for participants/media representatives in your tourism economic impact assessment is very important.

If, for example, you rely on information taken directly from the Event Organizer Form in conjunction with other spending information, your Technical Appendix should include the sources of additional information, why you made the decisions you did, and spreadsheets or descriptions of calculations used in the adjustment process.

## **D. Stand-alone studies of participants/media representatives – Option 3**

### **1. Overview of the process**

The basic steps in the proposed approach are as follows:

- Identify a source of information on the size of the universe under study (e.g., participants/media representatives);
- Develop a sampling, counting, information collection, analysis, weighting and projection plan as described in the main body of these guidelines;
- Customize the Spectator Survey questionnaire or Event Organizer questionnaire to meet the characteristics of your event and the group you are surveying;
- Conduct a Spectator Study, as described in the main body of these guidelines;
- Isolate and remove tourism spending by participants/media representatives from the Spectator Study, as described above for Option 1;
- Add the spending for participants and/or media representatives from the stand-alone participant/media representative study to the estimates of spectator spending associated with the event (adjusted for duplication) and assign this spending to the appropriate administrative unit (*local community or other parts of the province*), following the procedures described in these guidelines for the Spectator Study.

### **2. The universe under study**

If an official event representative can provide you with detailed information on the number of participants and/or media representatives attending the event, by place of residence, you should obtain this information. It will save you the time and effort required to count and tally participants and/or media representatives at pre-designated locations on the site.

If official “counts” by place of residence are not made available to you, you would develop a stint sampling plan for counting and tallying participants/media representatives as described in the main body of these guidelines. Using the weighting and projection procedures provided, you would achieve an estimate of the total number of participants/media representatives at the event over its full duration. Tourism spending estimates would be projected to this estimate.

#### **a) Obtain a count from event organizers**

Athletes are generally required to register for sporting events. Consequently, event organizers are likely to have a complete *count* of all participants, associated staff, media representatives, etc. Similarly, official media organizations covering the event register in order to obtain press passes so counts of these individuals should also be available from event organizers.

**b) Obtain lists from event organizers**

When you request *counts* from event organizers you will also ask them to provide you with lists of participants/media representatives containing as much detail as possible. For example, the event organizer may be able to provide information on the total number of people in each athlete's retinue or team, where they are staying in the community, the duration of their stay and other salient details.

It is most useful to have names and home addresses (even if only by city/province/state/country) for *each* individual who is attending the event because you will be able to determine which of them are tourists by checking their place of residence. Once you have removed the *locals* from the list, you would have the size of the *universe* (all the people in the group you have elected to study) for participants and media representatives.

**c) Construct a contact list**

Since different events will provide information in different formats and with different levels of detail, you will have to "work with what you are given" by event organizers.

**Lists of Individuals** If you were provided with lists at the individual level, including place of residence, you would first eliminate all *local* participants and/or media. You would then determine whether to attempt to obtain information from *all* remaining tourists on the list (this would be a *census*) or from a sample of them.

**Lists of Contact Persons** If you are provided with lists that only contain single contact names for athletes and associated staff and/or media organizations, you can contact the listed individuals and request more information (number of people coming to the event, place of residence) and then determine whether to undertake a census or sample of *individuals*. A sample questionnaire designed for *individual* participants and/or media representatives is provided at the end of this chapter. Alternatively, you can treat the "contacts" as your "universe" and undertake the study by obtaining information **from this contact person** about *all* the participants or media representatives coming to the event that he/she represents. In essence, the contact person becomes the *spokesperson* or *surrogate* for obtaining the information you need.

The prototype form provided for Option 2 (*Event Organizers*) can be adapted for a contact person sample (see previous section).

**3. How to decide to do a census or to sample participants/media representatives**

There are no hard and fast rules to determine when to undertake a *census* or to *sample* a group. The decision will depend on the total number of individuals or organizations you would have to contact if you were to undertake a census, what resources you have available to finance the data collection and analysis, and many other factors.

Generally speaking, the greater the diversity of the group under study, the more the balance tips in favour of a census. Diversity in the case of sporting event participants and/or media representatives would include how far they travelled to get to your community and the extent to which their sport requires practice under local conditions.

For example, an athlete or media representative travelling from one part of British Columbia to another is more likely to have friends or relatives with whom to billet in the community than is the one travelling from Quebec, Germany or Texas. In turn, the spending by these individuals will be quite different because some will have minimal or no lodging expenses (those who stay with friends and relatives) whereas others may have substantive ones (those who stay in hotels). You will want to ensure that you obtain spending information from *each* of these types of people.

Similarly, a skier may spend longer in the community to practice than would a figure skater. Differing lengths of stay will alter the amount of money these athletes spend in your community, and, in turn, may influence the estimate of tourism economic impact of the event. Again, you will want to have both types of athletes represented in the survey results.

**a) Expected response rates will influence the decision to do a census or sample**

For many spectator sporting events, the number of out-of-town participants and media representatives will be relatively small (under 200, each). In such cases, it is advisable to initiate a census rather than to sample because not everyone will return the information you require. In fact, you might anticipate that the response rate for participants or media representatives will be in the range of 25% to 30%.<sup>37</sup>

Thus, if you undertook a census using all 200 participants, you might expect to receive 60 completed surveys [200 participants \* 30% response rate = 60 completed surveys]. Had you sampled every third participant, you would have distributed 66 questionnaires [200 participants \* .33 sampling rate = 66 participants]. At a 30% response rate, would expect to receive about 20 completed ones [66 participants provided with questionnaires \* 30% response rate = 20 completed surveys].

Clearly, the information you obtain from 60 out of 200 participants will be more reliable and representative of *all* participants than information obtained from 20.

**b) Response rate may also influence your choice of data collection method**

You may elect to use a *personal* data collection methodology, using interviewers to administer the questionnaire in person (on-site) or over the telephone instead of relying on a self-completion approach. An *administered* survey (face-to-face or telephone) will likely yield a higher response rate than you would achieve if you use a self-completion approach among participants and media representatives.

If you decide to administer the interview, you will require either access to the on-site locations (see below for more discussion about an on-site approach) at which athletes and/or media

representatives congregate or telephone numbers to find them. You will also require trained interviewers to administer the interviews, in person or over the telephone.

**c) A census is advised for “contact person” studies**

If you are using contact persons as your source of information about individual participants or media representatives, a *census* rather than a *sample* is advised. This recommendation is made because until you have obtained information from the contact people, you have no way to estimate how many individual participant or media tourists each one represents.

For example, one contact person may represent a single athlete plus a trainer. Another may represent a team of athletes, a coach, several trainers, a physician, etc. Unless you have an idea of how many people are represented by each contact person, if you use a “sampling approach”, you will not be in a good position to estimate how many people your sample represents.

**4. Basic survey procedures are the same as for a *Spectator Study***

If you elect to conduct stand-alone on-site intercept studies of participants and/or media representatives, you would follow the same procedures described in the main body of these guidelines for *spectators*. In other words, you would develop a stint-based sampling frame, count and tally individuals entering (or exiting) the designated areas (training facilities, locker rooms, etc.), and provide qualifying individuals with a self-completion questionnaire based on the prototype included in this section.

**5. Customize questionnaires**

At the end of this section, you will find a prototype questionnaire based on the non-local version of the *spectator* questionnaire provided elsewhere in these guidelines. You can make further refinements to this prototype, taking into account the characteristics of the event and the data collection approach you select.

You might also consider whether translation into major language groups represented by participants and/or media personnel would enhance the accuracy of information provided and/or the level of cooperation you obtain from the target groups you plan to study.

## **6. Sampling, projection and weighting procedures**

If you elect to conduct stand-alone on-site intercept studies of participants and/or media representatives, you would follow the same procedures described in the main body of these guidelines for *spectators*. In other words, you would follow the weighting and projection procedures described in the main body of the guidelines, taking into account the stint sampling approach you used for the participant/media representative study.

## PROTOTYPE QUESTIONNAIRE: INDIVIDUAL PARTICIPANT/MEDIA NON-LOCAL VERSION

### INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE

- Who should complete this survey?** This questionnaire is for people who have travelled to NAME COMMUNITY from out-of-town and are PARTICIPANT VERSION: participating in NAME EVENT, as athletes, members of their staff or representatives, and those in other official capacities such as judges, referees, etc.; MEDIA VERSION: media representatives and crews.
- Why is the survey important?** Information you provide will help NAME EVENT organizers plan for future events and demonstrate the benefits the event 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.
- 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 each gate 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**. *Note: you would change this wording, depending on how you plan to set up retrieval of the questionnaires.*
- Freedom of Information** To be inserted based on regulations in your jurisdiction.
- 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 if I don’t know exactly what was spent on my behalf?** Please provide your best estimate of the money you spent or was spent on your behalf by other household members, organizations, sponsors, etc.
- What if I have more than one copy of the questionnaire?** Complete only ONE questionnaire for the **entire** event.
- 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 EVENT for *all* your visits to the event and on the **entire trip**.

PROVIDE MAP THAT CLEARLY DISPLAYS THE BOUNDARIES OF THE EVENT SITE’S COMMUNITY (“LOCAL”) AND THE BALANCE OF THE PROVINCE FOR WHICH YOU PLAN TO ESTIMATE THE TOURISM ECONOMIC IMPACT.

<b>INDIVIDUAL PARTICIPANT/MEDIA REPRESENTATIVE SURVEY</b>	Unique ID: _____ (PRE-PRINT A UNIQUE NUMBER ON EACH PARTICIPANT/MEDIA SURVEY BEFORE DISTRIBUTION. RECORD THIS NUMBER WHEN THE QUESTIONNAIRE IS HANDED OUT.)																																
<b>ABOUT YOUR TRIP (EVERYONE ANSWERS)</b>																																	
<p><b>WHERE DO YOU LIVE? (Write in)</b></p> <p>City/Town _____</p> <p>Province _____</p> <p>Country _____</p> <p>IF CANADA/USA: _____</p> <p>Postal/Zip Code _____</p> <p><b>HOUSEHOLD MEMBERS WITH YOU ON TRIP</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"></td> <td style="width: 10%; text-align: center;">1</td> <td style="width: 10%; text-align: center;">2</td> <td style="width: 10%; text-align: center;">3</td> <td style="width: 10%; text-align: center;">4</td> <td style="width: 10%; text-align: center;">5</td> <td style="width: 10%; text-align: center;">6</td> <td style="width: 10%; text-align: center;">Other</td> </tr> <tr> <td>Total (including yourself)</td> <td colspan="7" style="text-align: right;">WRITE IN</td> </tr> <tr> <td>Number under 18 years</td> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> <td style="text-align: center;">Other</td> </tr> <tr> <td></td> <td colspan="7" style="text-align: right;">WRITE IN</td> </tr> </table>		1	2	3	4	5	6	Other	Total (including yourself)	WRITE IN							Number under 18 years	0	1	2	3	4	5	Other		WRITE IN							<p><b>YOUR ROLE AT THE EVENT (Participant version)</b></p> <p>Athlete [ ]</p> <p>Member of athletic team (e.g., coach, manager, physician) [ ]</p> <p>Official (referee, judge, etc.) [ ]</p> <p>Other [ ]</p> <p><b>YOUR ROLE AT THE EVENT (Media version)</b></p> <p>Media representative (reporter, photographer, etc.) [ ]</p> <p>Member of media crew [ ]</p> <p>Other [ ]</p> <p><b>NIGHTS AWAY FROM HOME ON ENTIRE TRIP</b></p> <p>NONE [ ]</p> <p>Number of nights you plan to be away from home on entire trip _____ nights</p>
	1	2	3	4	5	6	Other																										
Total (including yourself)	WRITE IN																																
Number under 18 years	0	1	2	3	4	5	Other																										
	WRITE IN																																
<b>IF ANY NIGHTS AWAY FROM HOME</b>	<b>EVERYONE ANSWERS</b>																																
<p>LODGING NIGHTS (have or plan to spend in each location before returning home from trip)</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: center;">[NAME LOCAL COMMUNITY]</td> <td style="width: 20%; text-align: center;">Other Parts of [NAME PROVINCE]</td> </tr> <tr> <td></td> <td style="text-align: center;"># of nights</td> <td style="text-align: center;"># of nights</td> </tr> <tr> <td>Hotel, resort, lodge, etc.</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Motel</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>B&amp;B</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Campground/RV Park</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Other paid lodging (including dormitories if fees charged)</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Private home or cottage (unpaid)</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Other unpaid lodging (including dormitories if no fees charged)</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> </table>		[NAME LOCAL COMMUNITY]	Other Parts of [NAME PROVINCE]		# of nights	# of nights	Hotel, resort, lodge, etc.	_____	_____	Motel	_____	_____	B&B	_____	_____	Campground/RV Park	_____	_____	Other paid lodging (including dormitories if fees charged)	_____	_____	Private home or cottage (unpaid)	_____	_____	Other unpaid lodging (including dormitories if no fees charged)	_____	_____	<p><b>MAIN TYPE OF TRANSPORTATION (Type used to travel greatest distance on trip)</b></p> <p>Auto/truck/motorhome [ ]</p> <p>Inter-city bus [ ]</p> <p>Train [ ]</p> <p>Airplane [ ]</p> <p>Boat/ship [ ]</p> <p>Other [ ]</p>					
	[NAME LOCAL COMMUNITY]	Other Parts of [NAME PROVINCE]																															
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Other unpaid lodging (including dormitories if no fees charged)	_____	_____																															



**YOUR SPENDING OR MONEY SPENT ON YOUR BEHALF TO ATTEND [NAME EVENT]**

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.
- Items included in registration fees or travel packages that may have been used for goods or services on this trip (such as lodging, admission to attractions or events, meals, vehicle rental including bus rentals, airfare or bus fare, etc.).
- Taxes and tips.

Please report spending in XX currency, including money you spent and money that was spent on your behalf by [FOR PARTICIPANTS: members of your household, sponsors, sports or other organizations to attend this event. ] [FOR MEDIA: members of your household, your organization, other organizations or sponsors.]

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 provide the proportion of your spending that was or will be done in [NAME COMMUNITY].**

ALL SPENDING ASSOCIATED WITH [NAME EVENT]				ANY PLANE, TRAIN, INTER-CITY BUS, SHIP TICKETS BOUGHT FOR TRIP?	
	Spent Any?	Amount in XX\$ (currency)	Proportion spent/will spend in [NAME COMMUNITY]	No	Yes
<b>GROUND TRANSPORTATION</b>				IF YES: Was that a . . . ? Canadian transportation company <input type="checkbox"/> foreign transportation company <input type="checkbox"/>	
Gasoline/repairs for vehicle	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>	<b>Total spent on your transportation tickets</b> in XX currency (WRITE IN) \$_____00	
Vehicle rental	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>	Don't know <input type="checkbox"/>	
Parking	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
Local taxis, local buses, subways	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>FOOD &amp; BEVERAGES</b>					
Groceries (at grocery stores)	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
Food & beverages at restaurants	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
At lounges, bars, clubs	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>SHOPPING</b>					
Clothing	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
Other shopping	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>LODGING</b>					
Lodging	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>FEES</b>					
Registration fees for event	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
Other fees for event	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>RECREATION</b>					
Admissions/tickets to NAME EVENT (as a spectator)	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
Other recreation/entertainment (excluding EVENT)	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>OTHER</b>					
All other spending	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		
<b>TOTAL</b>					
All spending during planned stay in [NAME LOCATION]	<input type="checkbox"/>	\$_____00 Don't know <input type="checkbox"/>	_____% Don't know <input type="checkbox"/>		

WHO CONTRIBUTED TO YOUR SPENDING?																																																																																																					
Which of the following, if any, individuals or organizations contributed to the cost of your trip to NAME LOCAL COMMUNITY and about what proportion of your participation in NAME EVENT did each pay?						IF ANY OTHER HOUSEHOLD MEMBERS WHO WERE <b>WITH YOU</b> ON THE TRIP <b>CONTRIBUTED TO YOUR SPENDING</b> : Please indicate how many other household members who contributed to the spending you reported in the previous questions came with you on the trip and how many nights they spent in the local community.																																																																																															
	Who Contributed? Check box if any			What Proportion? Write in																																																																																																	
You, personally (not other household members)						[ ]			_____%			Other Household Members with you on trip who contributed to spending																																																																																									
Other household members on the trip with you						[ ]			_____%			Number of Nights in Local Community																																																																																									
Other household members NOT on the trip with you						[ ]			_____%																																																																																												
A sporting organization or sponsor						[ ]			_____%																																																																																												
A media organization or sponsor						[ ]			_____%																																																																																												
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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].																																																																																																					
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