



**FINAL REPORT**

**TALL SHIPS NOVA SCOTIA  
FESTIVAL 2007  
ECONOMIC IMPACT STUDY**

Submitted to:

**Tall Ships Nova Scotia  
Festival 2007 &  
Waterfront Development  
Corporation Limited**

November 13, 2007

A Study By  
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November 13, 2007

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*Our Project #: 07\_013 Tall Ships Evaluation 2007*

**RE: Tall Ships Nova Scotia Festival 2007 Economic Impact Study**

I am pleased to submit the attached Final Draft of the Tall Ships Nova Scotia Festival 2007 Economic Impact Study. This report provides an analysis of the economic impacts of visitor spending by those non-Nova Scotians who came to this province as a result of the Tall Ships Festival.

Please make note of any comments or questions you would like us to address and we will make the necessary amendments and finalize the report.

Sincerely,



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## Executive Summary

The following report was prepared by T.M.McGuire Ltd. for the Waterfront Development Corporation Limited as an assessment of the economic impact on Nova Scotia of **Tall Ships Nova Scotia Festival 2007**. The focus of the study was to determine the number of non-Nova Scotians who were motivated by the Tall Ships to visit the province and how the money spent by these individuals impacted our economy.

The Festival took place from July 12<sup>th</sup> to July 24<sup>th</sup>, and included 7 ports. Our team used an intercept survey to collect required information from random visitors at all ports. A total of 1,341 surveys were completed, providing more than enough data, on a range of factors, to allow for statistically reliable analysis of the sample population and strata within it, from party composition to trip related spending.

All survey responses were analysed and the results of this assessment are presented throughout the following pages. Particular components were derived for input into an I-O model, designed to calculate the economic impact of such events on the province.

Respondents were from the following locations:

- The Local Area – 57%
- Other Canadian Provinces – 16%
- Within Nova Scotia but Outside the Local Area – 13%
- The United States – 7%
- Other Atlantic Provinces – 5%
- International – 2%

Vendors and Sponsors were also surveyed or interviewed to add context to the spending information provided by visitors to Tall Ships Nova Scotia Festival 2007. Vendor and Sponsor surveys were conducted by using a combination of telephone interviews and an online survey. Interviews conducted over the phone allowed Year Round Vendors the opportunity to provide open-ended responses and elaborate on the impacts they experienced during Tall Ships Nova Scotia Festival 2007, from here on referred to as Tall Ships 2007 or Tall Ships. Vendors and Sponsors not only provided economic feedback, but also offered suggestions to the Committee<sup>1</sup> regarding ways to improve future events.

Through interviews with merchants and service providers on-site at Tall Ships 2007, we found that employers met their labour demand due to Tall Ships in three ways:

- Their current employees served more people per hour than they would at "normal" times of the year
- Their current employees worked longer hours than normal

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<sup>1</sup> Our Steering Committee was made up of individuals from:

- Nova Scotia Department of Finance, Economics and Statistics Division
- Nova Scotia Economic Development
- Nova Scotia Department of Tourism, Culture and Heritage, Tourism Division, Research
- Atlantic Canada Opportunities Agency
- Waterfront Development Corporation Limited

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- They hired additional staff on a short-term basis.

We expect that the suppliers of goods and services to the on-site commercial participants coped with increased levels of activity in the same manner as on-site participants. Therefore, while Tall Ships 2007 likely did not create long-term permanent jobs it did provide a short-term boost to profits, hours worked and household incomes, which helped, sustain as many as 475 positions through direct and spin-off impacts.<sup>2</sup>

### **Non-NS Spending**

The Nova Scotia Department of Finance conducted an Input-Output based impact analysis of the total Non-Nova Scotian Visitors' Tall Ships 2007 attributed spending data that was provided by our team. Total non-NS spending was due to the Tall Ships was estimated between \$22.7 and \$28 million.<sup>3</sup>

**The "new or additional activity that can be reported with a certain degree of accuracy is that the \$27.5 million of incremental expenditures in the economy will generate direct HST and fuel tax revenue to the Province of \$2.1 million."<sup>4</sup>**

The overall contribution to Nova Scotia's GDP by non-Nova Scotians visiting this province because of Tall Ships is as much as \$19.6 million through \$11.20 million in direct GDP, \$3.58 million in indirect GDP and \$4.87 million in induced GDP (all at market prices).

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<sup>2</sup> Spin-off impacts include indirect (spending through inter-industry linkages e.g. suppliers to direct Tall Ships service providers) and induced impacts (spending and re-spending of household income).

<sup>3</sup> That is, spending that would not have occurred in NS without Tall Ships 2007. The steps taken to estimate incrementality are described in later sections of the report.

<sup>4</sup> Economic Impact Of Tall Ships 2007 On Nova Scotia; by Economics and Statistics Division, Nova Scotia Department of Finance, November 2007. This is provided in **Appendix A**.

## **Acknowledgements**

The Project Team wishes to thank:

- Nova Scotia Department of Finance, Economics and Statistics Division
- Nova Scotia Economic Development
- Nova Scotia Department of Tourism, Culture and Heritage, Tourism Division, Research
- Atlantic Canada Opportunities Agency
- Waterfront Development Corporation Limited

We would also like to thank the Project Office of the Tall Ships Nova Scotia Festival 2007 and the organizers of the Festival at the ports beyond Halifax for their support throughout our evaluation process.

We are particularly thankful to have had a group of enthusiastic Tall Ships volunteers throughout the surveying process in all of the participating ports.

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## TABLE OF CONTENTS

1	Introduction .....	1
1.1	Study Objectives.....	1
1.2	Study Methodology & Work Plan .....	2
2	Survey Findings .....	3
2.1	Time Spent at Tall Ships .....	4
2.2	Visiting Tall Ships .....	6
2.2.1	Planned or Intended Visits To Tall Ships .....	6
2.2.2	Trips to the Tall Ships Event .....	6
2.3	Ticket Purchases .....	8
2.3.1	Ticket Purchases - NS Wide .....	9
2.4	Party Size and Composition .....	11
2.5	Origin of Survey Participant .....	13
2.5.1	Halifax Port Survey Set .....	13
2.6	Out Ports Survey Set .....	15
2.6.1	Out Port and Halifax Port Combined (NS Survey Set) .....	15
2.6.2	Selected Out Ports .....	16
2.7	Daily Expenditure in Relation to Tall Ships .....	20
2.8	Tall Ships & Motivation to Visit Waterfront .....	20
2.9	Tall Ships & Motivation for Travel in NS .....	21
2.10	Travel Nights in Nova Scotia .....	24
2.11	Extended Nights .....	25
2.12	Total Expenditures Estimates .....	28
2.13	Detailed Expenditures Estimates .....	28
2.14	Overall Satisfaction with Tall Ships .....	30
2.15	Plans to Visit Other Ports .....	31
2.15.1	Probability of Visiting Another Port, Based on the Party's Origin .....	32
2.16	Potential for Follow-up .....	33
2.17	Gender .....	33
2.18	Open Comments .....	33
3	Gross and Attributed Non NS Spending .....	34
3.1	HRM Police Counts – Halifax Port .....	34
3.2	Estimation Halifax Port Site Crowds .....	34
3.2.1	Reconciliation of Alternative Crowd Size Estimates .....	37
3.2.2	Summary of “Unique” Visitors to Tall Ships – All Ports .....	38
3.3	Gross and Incremental Tall Ships Spending by Non Nova Scotians .....	38
3.4	Other Tall Ships Transactions .....	41
4	Economic Impact of Non-Nova Scotian Spending .....	42
5	Vendor and Sponsor Feedback .....	44
5.1	Approach to Vendor/Sponsor Feedback .....	44
5.2	Vendor/Sponsor Feedback .....	45
5.3	Responses from Year-Round Halifax Businesses .....	49
6	Methodology Lessons Learned .....	51

Appendix A – Survey Methodology .....	53
Step 1 - Survey Design: An Iterative Process .....	53
Step 2: Survey Format.....	53
Step 3: Pre-Test Survey .....	54
Step 4: Volunteer Coordination .....	54
Step 5: Volunteer Orientation and Training Session .....	55
Step 6: Deployment of Survey (Halifax Port).....	56
Step 7: On Site Survey Management (Halifax Port).....	56
Step 8: Sample Objectives & Scheduling.....	56
Step 9: Out Port Intercept Survey Process.....	58
Step 10: Data Entry, Data Cleaning & Analysis.....	58
Step 11: Surveying Port of Halifax Sponsors & Vendors.....	59
Step 12: Technical Review .....	59
Appendix B - Port of Halifax Survey .....	60
Appendix C - Statistical Appendix .....	61
Appendix D – Economic Impact .....	64

## TABLE OF TABLES

TABLE 1 – AVERAGE NUMBER OF VISITS TO TALL SHIPS EVENT, BY VISITOR ORIGIN .....	7
TABLE 2 – AVERAGE TICKET PURCHASE BY TICKET TYPE AND VISITOR ORIGIN .....	8
TABLE 3 – REASONS FOR NOT BUYING BOARDING PASSES .....	10
TABLE 4 – PARTY SIZE BY VISITOR ORIGIN .....	11
TABLE 5 – WHERE IS YOUR USUAL PLACE OF RESIDENCE? (HALIFAX PORT SET).....	14
TABLE 6 – WHERE IS YOUR USUAL PLACE OF RESIDENCE? (OUT PORT SET).....	15
TABLE 7 – DAILY EXPENDITURES IN RELATION TO TALL SHIPS (LOCAL ATTENDEES).....	20
TABLE 8 – DAY VISIT AND MOTIVATION (ALL ATTENDEES) .....	20
TABLE 9 – MOTIVATION TO TRAVEL IN NS, BY PORT.....	22
TABLE 10 – MOTIVATION OF TALL SHIPS IN CAUSING NON-LOCAL TRAVEL IN NS N=525 .....	24
TABLE 11 – NIGHTS IN NS, BY VISITOR ORIGIN AND SURVEY SET N=499 .....	26
TABLE 12 – NON LOCAL RESIDENT SPENDING PER PARTY BY TYPE OF EXPENSES, N=471 .....	28
TABLE 13 – VISITOR SPENDING BY ORIGIN AND SURVEY SET .....	29
TABLE 14 – NON-NS VISITOR SPENDING BY ORIGIN AND SURVEY SET .....	30
TABLE 15 – OVERALL, HOW SATISFIED ARE YOU WITH THE TALL SHIPS EVENT? .....	31
TABLE 16 – PLANS TO VISIT OTHER TALL SHIPS PORTS .....	32
TABLE 17 – PLANS TO VISIT OTHER PORTS IN NOVA SCOTIA TO SEE THE TALL SHIPS, BY ORIGIN.....	32
TABLE 18 – TALL SHIPS 2007 GROSS* CROWD ESTIMATES (LOW) .....	36
TABLE 19 – TALL SHIPS 2007 GROSS* CROWD ESTIMATES (HIGH) .....	36
TABLE 20 – ESTIMATED TOTAL ATTENDANCE, UNIQUE VISITORS, ALL NOVA SCOTIA .....	38
TABLE 21 – ANALYSIS OF GROSS PARTICIPANT AND “MOTIVATION” ADJUSTED NON-NS SPENDING.....	39
TABLE 22 – ANALYSIS OF NON NOVA SCOTIAN SPENDING, PER PARTY, BY EXPENSES, N=352 .....	40
TABLE 23 – SUMMARY OF NIGHTS STAYED, BY VISITOR ORIGIN AND SURVEY SET N=40.....	61
TABLE 24 – TOTAL TRIP EXPENDITURE – SUMMARY OF ALL CATEGORIES, BY RESIDENCE.....	61
TABLE 25 – TALL SHIPS MOTIVATION TO TRAVEL IN NS, BY PORTS AND VISITOR ORIGIN .....	62

## LIST OF FIGURES

FIGURE 1 – SURVEY DAYS.....	3
FIGURE 2 – PARTICIPATING PORTS.....	4
FIGURE 3 – AVERAGE DURATION OF DAILY VISIT TO TALL SHIPS (TIME AT THE WATERFRONT).....	5
FIGURE 4 – AVERAGE DURATION OF DAILY VISIT TO TALL SHIPS BY SURVEY SET.....	5
FIGURE 5 – DAYS VISITED OR DAYS PLANNED TO VISIT THE TALL SHIPS .....	6
FIGURE 6 – AVERAGE NUMBER OF VISITS TO TALL SHIPS EVENT, BY VISITOR ORIGIN.....	7
FIGURE 7 – MULTI-DAY BOARDING PASSES, BY VISITOR ORIGIN.....	9

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FIGURE 8 – SINGLE-DAY BOARDING PASSES, BY VISITOR ORIGIN .....	9
FIGURE 9 – REASONS FOR NOT BUY BOARDING PASSES.....	10
FIGURE 10 – AVERAGE PARTY SIZE, BY VISITOR ORIGIN .....	12
FIGURE 11 – FREQUENCY OF PARTY SIZE .....	13
FIGURE 12 – HALIFAX PORT TALL SHIPS PARTICIPANTS BY ORIGIN.....	14
FIGURE 13 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – ALL PORTS.....	16
FIGURE 14 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – YARMOUTH .....	17
FIGURE 15 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – SHELBURNE .....	17
FIGURE 16 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – LOUISBOURG.....	18
FIGURE 17 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – SYDNEY .....	18
FIGURE 18 – VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 – PICTOU .....	19
FIGURE 19 – NON-NS VISITOR ORIGIN, TALL SHIPS NOVA SCOTIA FESTIVAL 2007 .....	19
FIGURE 20 – REASON FOR VISIT TO THE WATERFRONT .....	21
FIGURE 21 – ROLE OF TALL SHIPS IN MOTIVATING TRAVEL TO NS, ALL PORTS .....	23
FIGURE 22 – ROLE OF TALL SHIPS IN MOTIVATING TRAVEL TO NS BY SURVEY SET .....	23
FIGURE 23 – NS NIGHTS, TALL SHIP NIGHTS AND NIGHTS EXTENDED BY TALL SHIPS.....	25
FIGURE 24 – PROBABILITY OF TALL SHIPS EXTENDING VISITOR STAYS .....	27
FIGURE 25 – NUMBER OF NS NIGHTS, TALL SHIP AND EXTENDED NIGHTS BY ORIGIN.....	27
FIGURE 26 – LEVEL OF SATISFACTION WITH TALL SHIPS 2007.....	31
FIGURE 27 – HALIFAX PORT SURVEY CREW PLANNED SHIFT SCHEDULE .....	57



# 1 INTRODUCTION

Tall Ships Nova Scotia Festival 2007 was a 9-day event that took place throughout Nova Scotia from July 12<sup>th</sup> to July 24<sup>th</sup> (inclusive). It included a five-day stop in Halifax and a series of two-day visits to the following Out Ports:

- Yarmouth
- Shelburne
- Lunenburg
- Port Hawkesbury
- Louisbourg
- Sydney
- Pictou

As part of Tall Ships Nova Scotia Festival 2007's accountability commitment to their stakeholders, a *measurement and evaluation* study was commissioned to assess the economic benefits of the 2007 festival to the Province of Nova Scotia.

T.M. McGuire Ltd. is pleased to submit this final report on the economic benefit of The Tall Ships Nova Scotia Festival 2007 on the province's economy.

## 1.1 STUDY OBJECTIVES

The objectives of this assignment are to provide:

- A credible economic impact analysis of Tall Ships Nova Scotia Festival 2007; and
- Information that will help Tall Ships Nova Scotia Festival, the Waterfront Development Corporation Limited and their stakeholders understand the impact of the event throughout Nova Scotia.

In the course of meeting the objectives, we addressed the following questions:

- What was the **incremental impact** of the investment in Tall Ships 2007? That is, what new economic activity occurred that would not have occurred otherwise.
- What was the importance of Tall Ships Nova Scotia Festival 2007 in trip motivation? That is, what influence did the Tall Ships Nova Scotia Festival have on bringing out of province travellers into Nova Scotia?
- What was the overall economic impact, measured in terms of incremental employment, personal income, provincial and municipal fiscal effects, etc., on the Province?
- What was the overall level of satisfaction with the Festival?
- How did vendors and sponsors view the Festival? What did they find beneficial and how likely are they to become part of subsequent Tall Ships Festivals?

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This report provides:

- A top-line statistical summary of the surveys.
- Commentary on overall impressions of the event and its success.
- An Input-Output based assessment of the direct, indirect, and induced benefits to the province of the Tall Ships Event using the Nova Scotia Input-Output model.
- An overview of the methodology so that it, along with the lessons learned, it could be applied to evaluate the economic impacts of subsequent Tall Ships Festivals.

## 1.2 STUDY METHODOLOGY & WORK PLAN

The research into the economic impact of the Tall Ships Festival was “primary research focused” – meaning it included:

- An **Intercept Survey** of individuals attending the event (based on the 2000 and 2004 surveys – estimated at 10 to 15 minutes to administer; asked by 10 to 12 Tall Ships 2007 volunteers and five contract surveyors, trained by our team).  
Questions identified:
  - The origin of attendees.
  - Their expenditures at the event and on related travel in Nova Scotia.
  - Their enjoyment of the event.
  - The influence Tall Ships had over their travel in Nova Scotia.
- Web based and telephone based **interviews with suppliers and sponsors** of the event to identify their satisfaction with the event itself and the return from their contribution.
- A survey and interviews with organizations that sponsored the Tall Ships 2007 Festival.

The research also included:

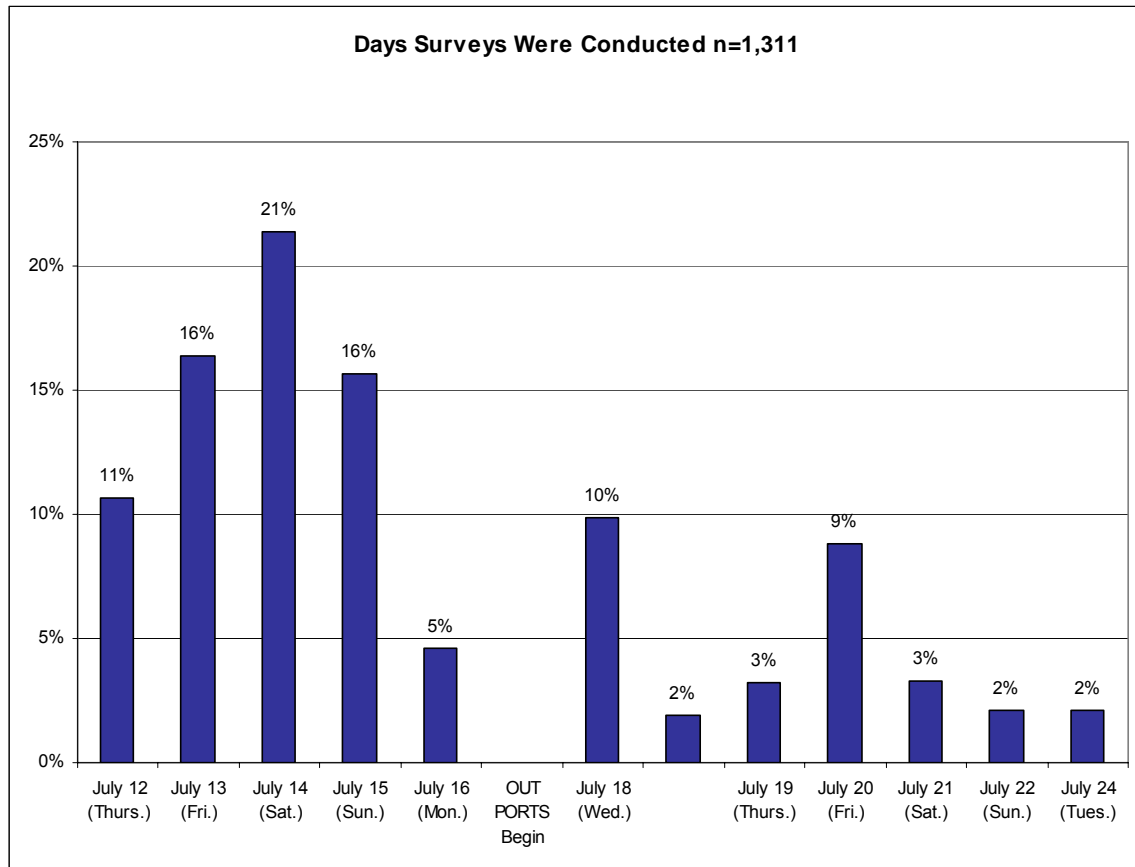
- **I-O modeling** - Data gathered through the survey processes were used to develop inputs for the Nova Scotia Department of Finance’s I-O Model.

Details on the methodology and work plan are provided in **Appendix A**. The Appendix may serve as a template for future Tall Ships Evaluation efforts.

## 2 SURVEY FINDINGS

In total, 1,341 intercept surveys were completed from Tall Ships Nova Scotia Festival 2007 participants, province wide. The Halifax Waterfront generated 911 completed surveys (Halifax Port Set) and Provincial Out Ports produced 441 completed surveys (Out Port Set).

Surveying took place on each day of the Tall Ships Nova Scotia Festival 2007 event as shown in **Figure 1**.



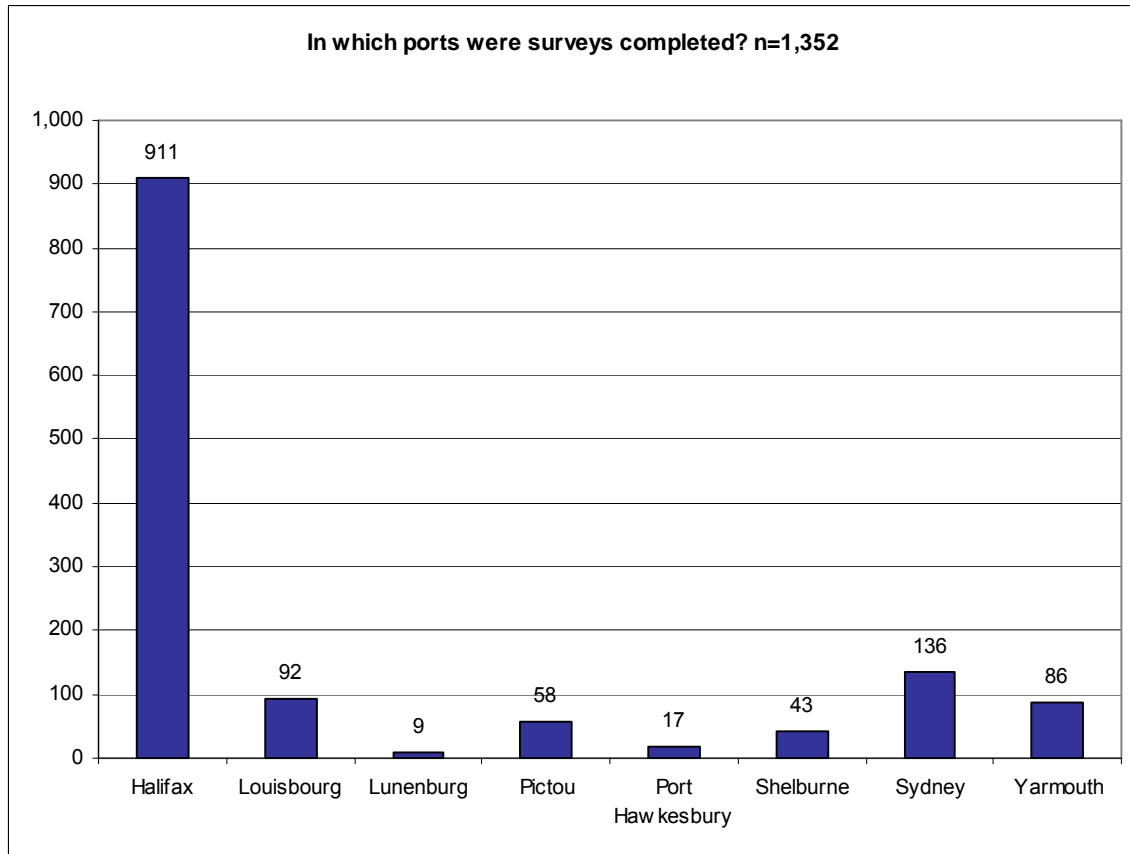
**Figure 1 – Survey Days**

July 17<sup>th</sup> was a repositioning day for most vessels. The ships were not open to the public and no surveying was conducted.

As shown in **Figure 1**, the majority of the surveys were collected from July 13<sup>th</sup> to the 15<sup>th</sup>, coinciding with the weekend in Halifax Port. July 18<sup>th</sup> and July 20<sup>th</sup> represented the next two largest days for survey returns.

In the Out Port and Halifax Port parts of the Festival, 384 completed surveys would have provided a statistically representative sample with an error rate of +/- 5%, 19 times out of 20. The target for Halifax was set at 500 because of the need to be able to stratify the sample based on visitor origin and trip motivation, among other characteristics.

**Figure 2** provides a summary of the number of completed surveys, by Tall Ships Port.



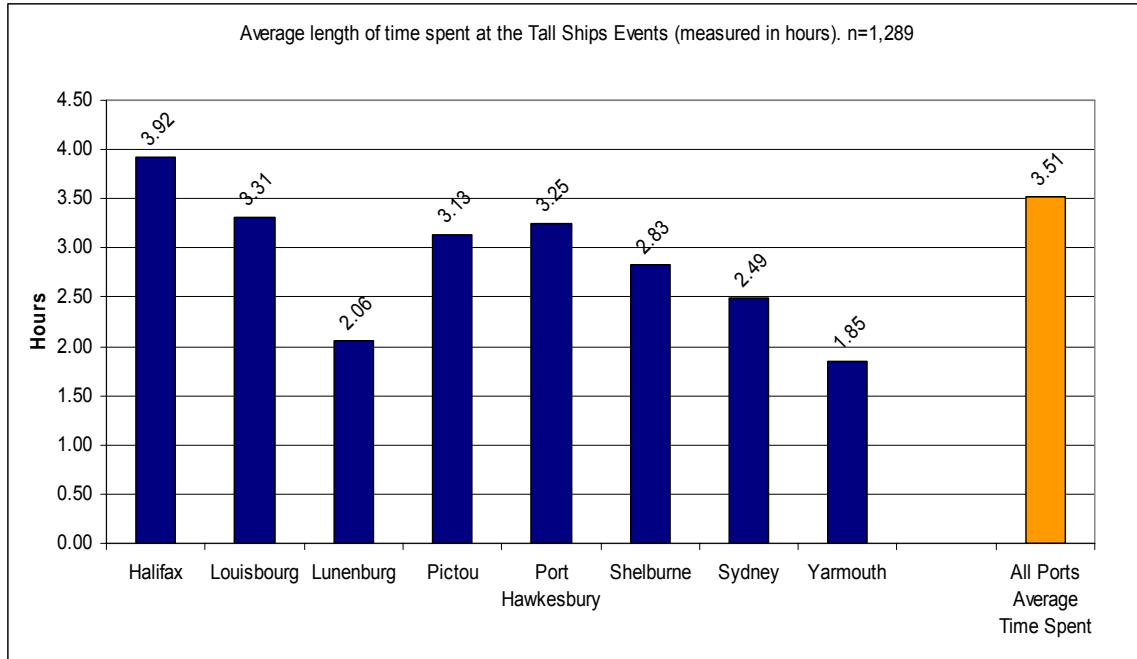
**Figure 2 – Participating Ports**

While the Out Port sample is large enough to provide statistically significant results for the entire Out Port portion of the Tall Ships 2007 event, generally the data are not sufficient to provide analysis of the experiences of individual Out Ports because there are too few observations in most Out Ports

## 2.1 TIME SPENT AT TALL SHIPS

Question 1 of the survey asked: **How much time do you expect to spend on the Waterfront TODAY in relation to the Tall Ships?**

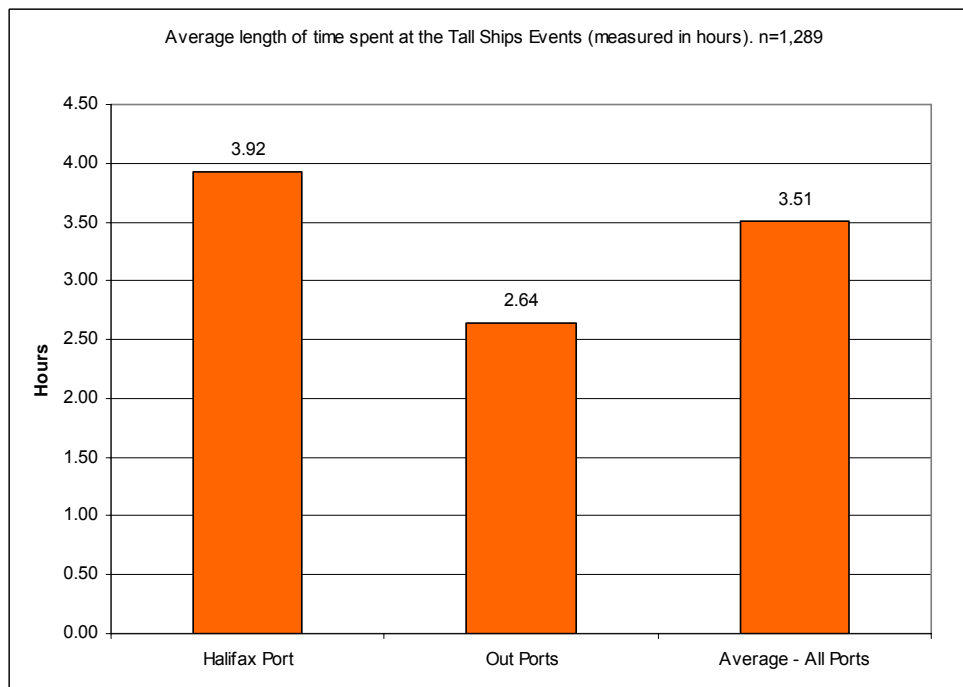
Province wide, 1,289 survey participants responded and indicated they tended to spend 3.51 hours per day at the Tall Ships. The average length of time spent at the Tall Ships per day, per port and per survey set (Halifax Port Set, Out Port Set and the All Ports Set – which is the Out Port and Halifax Port Sets combined) is presented in **Figure 3**.



**Figure 3 – Average Duration of Daily Visit to Tall Ships (time at the waterfront)**

The provincial average (All Ports) is shown in orange with 3.51 hours average daily visit. The average duration of daily visits in Halifax was slightly higher at 3.92.

**Figure 4** presents the average duration of Tall Ships visits in each data set (Halifax Port Set, Out Ports Set, and All NS Set).



**Figure 4 – Average Duration of Daily Visit to Tall Ships by Survey Set**

## 2.2 VISITING TALL SHIPS

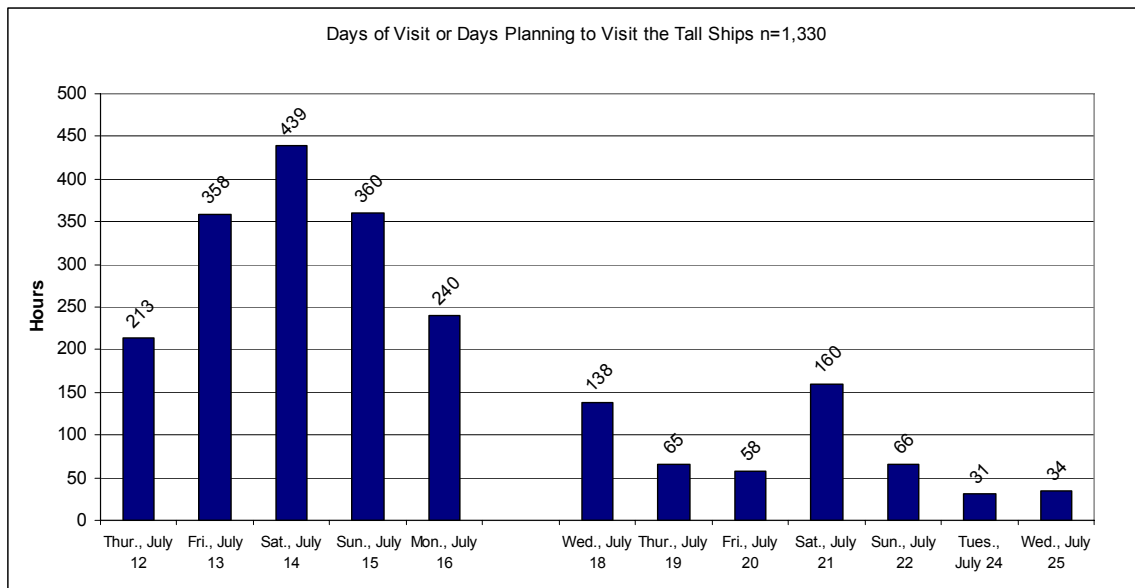
Intercept survey participants were asked a two-part question on their planned visits to Tall Ships:

- On what days did they visit or plan to visit the Tall Ships?
- How many trips did they make or expect to make to the Waterfront to see the Tall Ships?

***These questions were asked to help assess the number of times a unique person was likely to have visited Tall Ships Nova Scotia Festival 2007.***

### 2.2.1 PLANNED OR INTENDED VISITS TO TALL SHIPS

The number of people who "visited or planned to visit" the Tall Ships each day is presented in **Figure 5**.

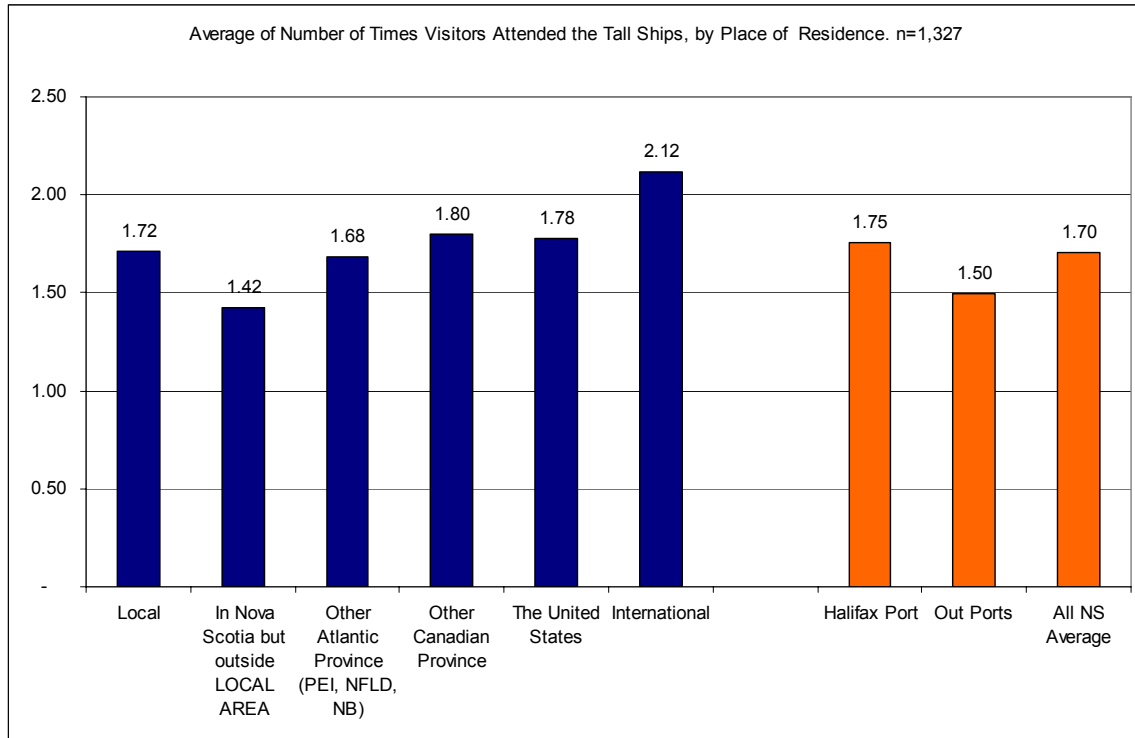


**Figure 5 – Days Visited or Days Planned to Visit the Tall Ships**

Based on the reported intentions of 1,330 responses to this question, one would expect Saturday in Halifax to have been the busiest day for Tall Ships Nova Scotia Festival 2007.

### 2.2.2 TRIPS TO THE TALL SHIPS EVENT

On average, survey participants indicated they visited or planned to visit the Tall Ships Events 1.7 times. International visitors were the most likely to be repeat visitors, followed by visitors from Canadian Provinces outside of Atlantic Canada, visitors from the US, and visitors from the host port (local). This is presented in **Figure 6**.



**Figure 6 – Average Number of Visits to Tall Ships Event, by Visitor Origin**

The average number of visits or planned visits per person to the Halifax Tall Ships Event was 1.75, while visitors to the Out Ports portion of Tall Ships 2007 events had visited or planned to visit the Tall Ships event 1.5 times.

Visitor Origin	Average Visits Per Person
Local	1.72
In Nova Scotia but outside LOCAL AREA	1.42
Other Atlantic Province (PEI, NFLD, NB)	1.68
Other Canadian Province	1.80
The United States	1.78
International	2.12
<b>All Origin Average</b>	<b>1.70</b>

The Provincial average number of Tall Ships' visits was 1.70. **Table 1** provides a summary of average number of times Tall Ships attendees visited the waterfront.

**These data are used to help determine the number of unique visitors to Tall Ships.**

## 2.3 TICKET PURCHASES

Survey respondents purchased or intended to purchase the following tickets:

- 735 Tall Ships Multi-Day Boarding Passes
- 601 Tall Ships Single Day Boarding Passes
- 51 Tall Ships Evening Event & Concert Tickets
- 39 Tall Ships Tickets for Daily Entertainment

**NOTE:** Out Ports were surveyed for “Tall Ships Boarding” passes, whereas four ticket types were surveyed in Halifax. For the purpose of data analysis, Out Port boarding pass ticket sales are grouped with “Multi-Day” passes in the data.

**Table 2** presents the:

- Average number of tickets purchased or intended to be purchased by survey respondents (who purchased or intended to purchase tickets of some type); and
- Number of respondents, reporting tickets by type of ticket and visitor origin (excludes those who did not identify their origin).

<b>Table 2 – Average Ticket Purchase by Ticket Type and Visitor Origin</b>				
<b>Origin</b>	<b>Tall Ships Multi-Day Boarding Passes</b>	<b>Tall Ships Single Day Boarding Passes</b>	<b>Tall Ships Evening Event &amp; Concert Tickets</b>	<b>Tall Ships Tickets for Daily Entertainment</b>
Local	2.35	2.40	1.81	1.89
<i># Reporting Ticket Purchase</i>	171	114	16	9
In Nova Scotia but outside LOCAL AREA	2.73	3.17	3.33	
<i># Reporting Ticket Purchase</i>	40	23	3	0
Other Atlantic Province (PEI, NFLD, NB)	2.50	2.14	2.00	2.60
<i># Reporting Ticket Purchase</i>	14	22	3	5
Other Canadian Province	2.85	2.92	2.00	2.50
<i># Reporting Ticket Purchase</i>	46	53	1	2
The United States	2.47	2.54	2.00	2.00
<i># Reporting Ticket Purchase</i>	19	13	2	1
International	2.40	3.17		2.00
<i># Reporting Ticket Purchase</i>	5	6		1
<b>Halifax Port Average (All Origin)</b>	<b>2.58</b>	<b>2.60</b>	<b>2.04</b>	<b>2.17</b>
<i>Total Number of Out Port Reporting Ticket Purchase</i>	59	231	25	18
<b>Out Port Average (All Origin)</b>	<b>2.47</b>			
<i>Total Number of Halifax Port Reporting Ticket Purchase</i>	236			
<b>NS Average (All Origin)</b>	<b>2.49</b>	<b>2.60</b>	<b>2.04</b>	<b>2.17</b>
<i>Total Number of NS Reporting Ticket Purchase</i>	295	231	25	18

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Each of the 295 respondents purchased an average of 2.49 Tall Ships Multi-Day Boarding Passes (735 tickets in all) and 2.60 Tall Ships Single Day Boarding Passes (601 tickets in all). The distribution of Multi-Day Boarding Passes purchased with respect to visitor origin is shown in **Figure 8**. Tickets were more commonly purchased by local residents, with a higher rate of purchase among Out Port local residents relative to Halifax Port local residents.

### 2.3.1 TICKET PURCHASES - NS WIDE

Nova Scotia wide, local residents purchased or intended to purchase the largest share of Multi-Day Boarding Passes (54%) followed by visitors from Other Canadian Provinces (18%) and Nova Scotia Residents from outside the local area (15%).

The distribution of Single-Day Boarding Passes purchased, by visitor origin, is shown in **Figure 7**.

Local residents purchased the largest share of Single-Day Boarding Passes (46%) followed by visitors from Other Canadian Provinces (26%) and Nova Scotia Residents from outside the local area (12%).

A total of 51 Tall Ships Evening Event and Concert Tickets were purchased by 25 survey participants and 39 Tall Ships Tickets for Daily Entertainment were purchased by 18 survey participants.

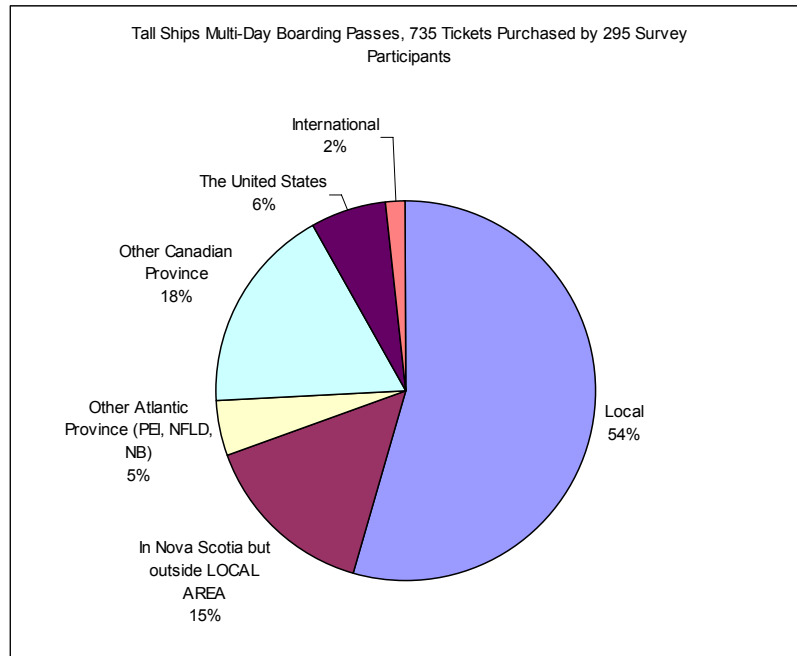


Figure 7 – Multi-Day Boarding Passes, by Visitor Origin

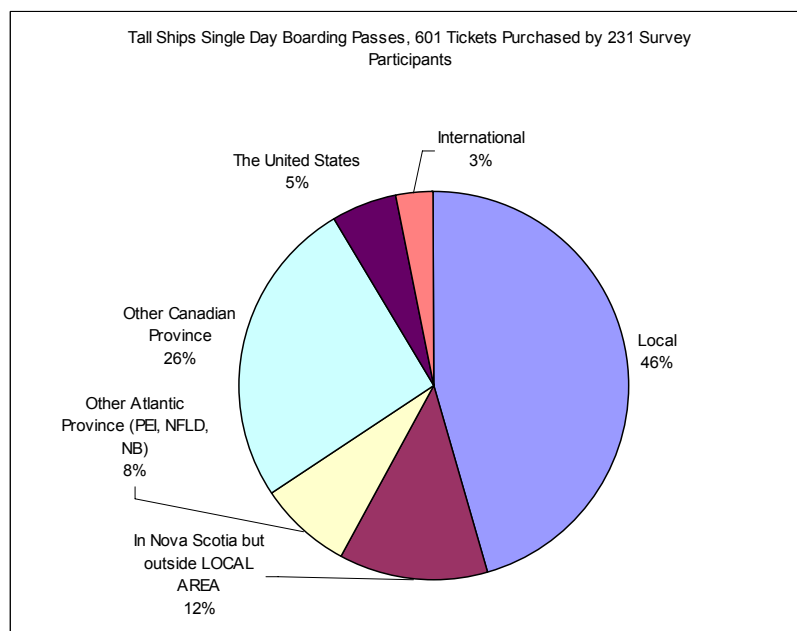
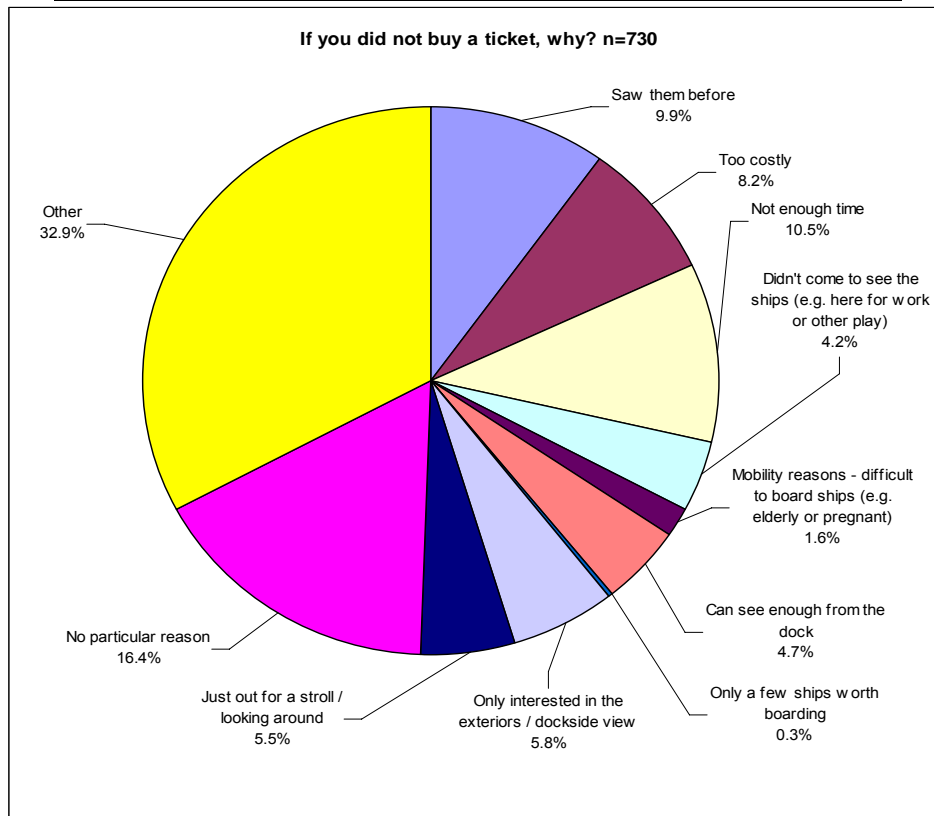


Figure 8 – Single-Day Boarding Passes, by Visitor Origin

Survey respondents who did not purchase Tall Ships tickets were asked to “Please give a reason why you did or did not purchase Tall Ships tickets.” A total of 730 reasons were given. These responses were reviewed and grouped into categories. **Table 3** provides a summary of the reasons offered for not purchasing Tall Ships tickets.

<b>Table 3 – Reasons for Not Buying Boarding Passes</b>		
<b>Reasons for not buying passes</b>	<b>Response Percent</b>	<b>Response Count</b>
Saw them before	9.86%	72
Too costly	8.22%	60
Not enough time	10.55%	77
Didn't come to see the ships (e.g. here for work or other play)	4.25%	31
Mobility reasons - difficult to board ships (e.g. elderly or pregnant)	1.64%	12
Can see enough from the dock	4.66%	34
Only a few ships worth boarding	0.27%	2
Only interested in the exteriors / dockside view	5.75%	42
Just out for a stroll / looking around	5.48%	40
No particular reason	16.44%	120
Other	32.88%	240
<b>answered question</b>		<b>730</b>



**Figure 9 – Reasons for Not Buy Boarding Passes**

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**Figure 9** provides a graphical distribution of the reasons offered for not purchasing Tall Ships tickets.

Only 8.2% of the reasons offered identified cost of the tickets as an issue. The high proportion of “Other” responses (33%) reflects the breadth of reasons that could not easily be grouped.

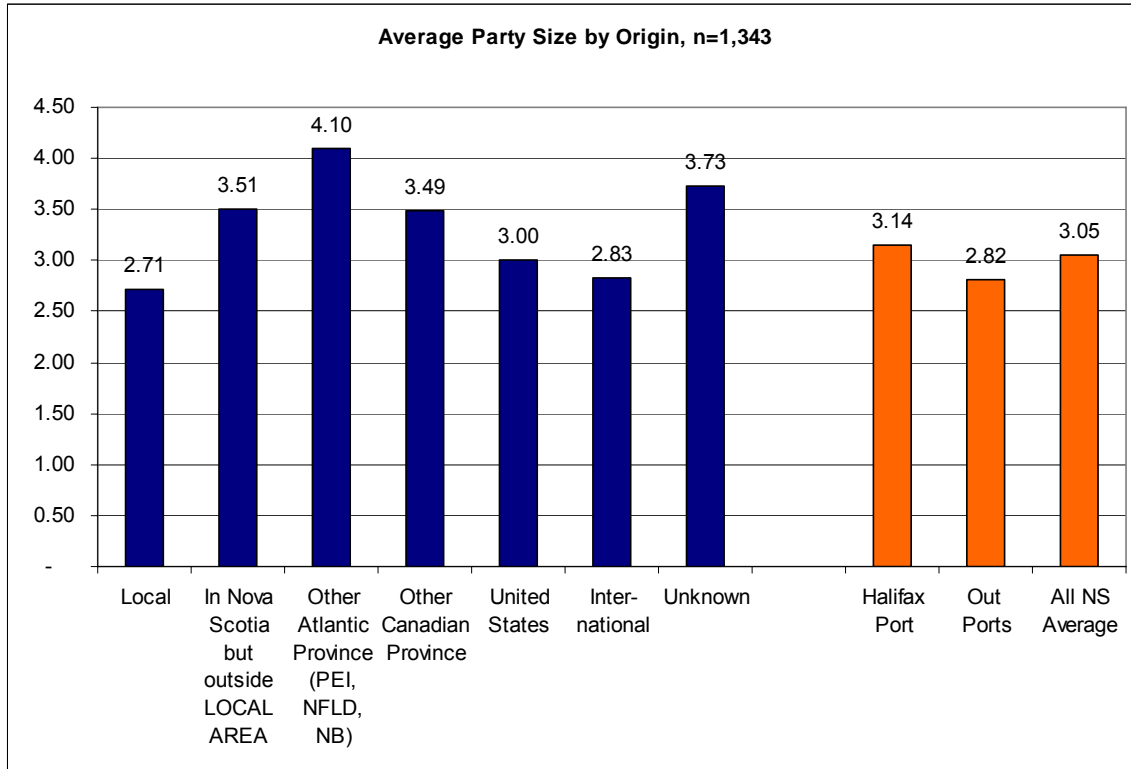
It is difficult to correlate the response to this question with actual ticket sales because we are not able to determine the proportion of those who indicated an “intent” to purchase a ticket but did not fulfill their intention.

## 2.4 PARTY SIZE AND COMPOSITION

Intercept survey participants were asked to describe the composition of the group with whom they were travelling. **Table 4** summarizes the responses.

<b>Table 4 – Party Size by Visitor Origin</b>			
<b>Party Type</b>	<b>Average Size of Party, by Party Type</b>		
	<b>Halifax Port</b>	<b>Out Ports</b>	<b>NS Average</b>
Alone	1.00	1.00	1.00
Immediate family (spouse and/or children)	2.95	3.03	2.97
Tour Group	5.00		5.00
Friends and/or Family	5.51	4.95	5.39
Friends only	3.20	3.21	3.20
Other relatives (parents, nieces/nephews, etc.)	4.24	4.50	4.28
Unknown Party Type	4.45	3.32	3.78
<b>Average Party Type by Survey Set</b>	<b>3.14</b>	<b>2.82</b>	<b>3.05</b>

The average party size at the Halifax Port was 3.14 people. The average Out Port party size was 2.8 and 3.05 people were in the average party across all Tall Ships Ports. A total of 1,343 respondents provided details on their party composition, with responses presented graphically, by party origin, in **Figure 10**.



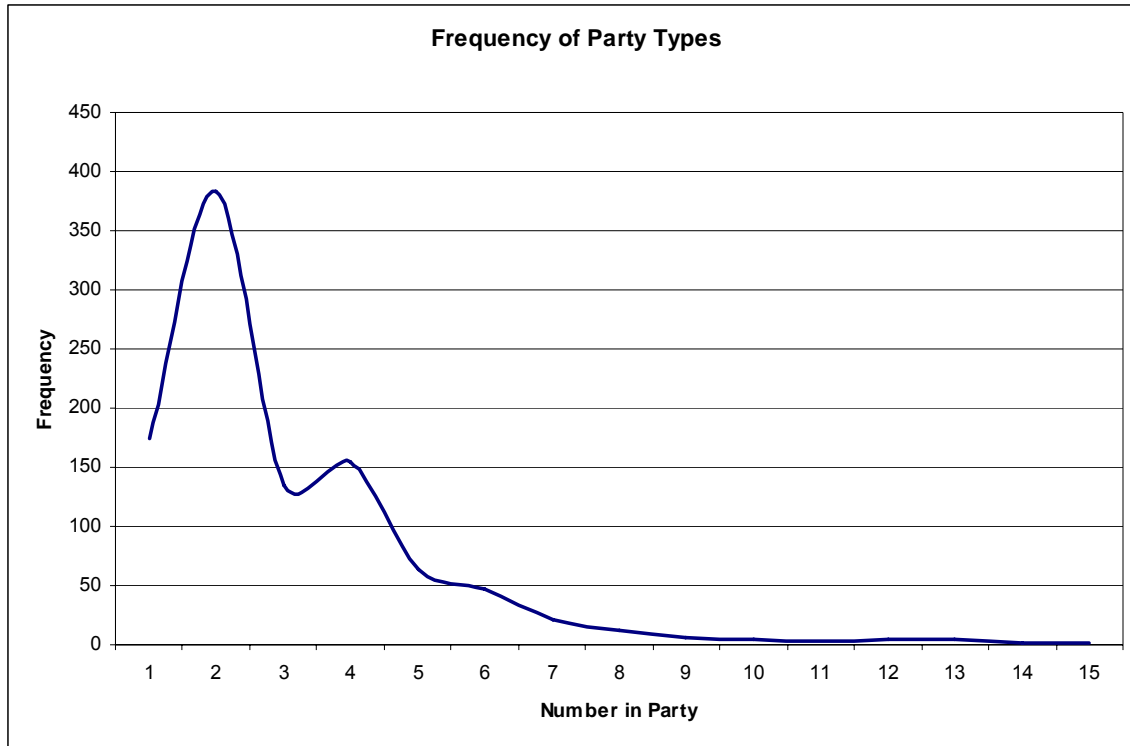
**Figure 10 – Average Party Size, by Visitor Origin**

**Figure 11** plots the frequency of occurrences of various party sizes for all of Nova Scotia. The breakdown, percentage wise is as follows:

- alone, 13.0%;
- two person party, 28.6%;
- three person party, 9.7%;
- four person party, 11.5%; and
- more than four persons in the party, 37.2%.

In total, 943 individuals were represented by people who were alone or traveling as part of a couple – parties travelling with more than two people represented over 2,100 people.<sup>5</sup>

<sup>5</sup> Note: for the purpose of conducting the economic impact modeling, we deleted very large parties from non-NS visitor group thus the average of 3.46 people per party was reduced to 3.36 persons per party. This had the effect of increasing the non-NS parties estimated to be present at Tall Ships NS.



**Figure 11 – Frequency of Party Size**

Open-ended comments provided on party composition reflected the following party group combination, with people visiting with/as:

- Children or “babysitting” (2 mentions)
- Clients
- A Couple (7)
- Co-workers (6)
- Crew/On Boat/with Shipmates (3)
- Family
- A Pipe band
- Workers/work-boss (2)

## 2.5 ORIGIN OF SURVEY PARTICIPANT

The origin of survey participants is presented below, in **Table 5**, for Halifax Port, the Out Ports and Nova Scotia (Halifax Port and the Out Ports combined).

### 2.5.1 HALIFAX PORT SURVEY SET

The majority of Tall Ships attendees at the Halifax event were from HRM (51.44%) while 48.56% indicated they were from outside HRM.

Of the 438 respondents (48.56%) who indicated they were not from HRM, 416 provided information on their origins, which breakdown as follows:

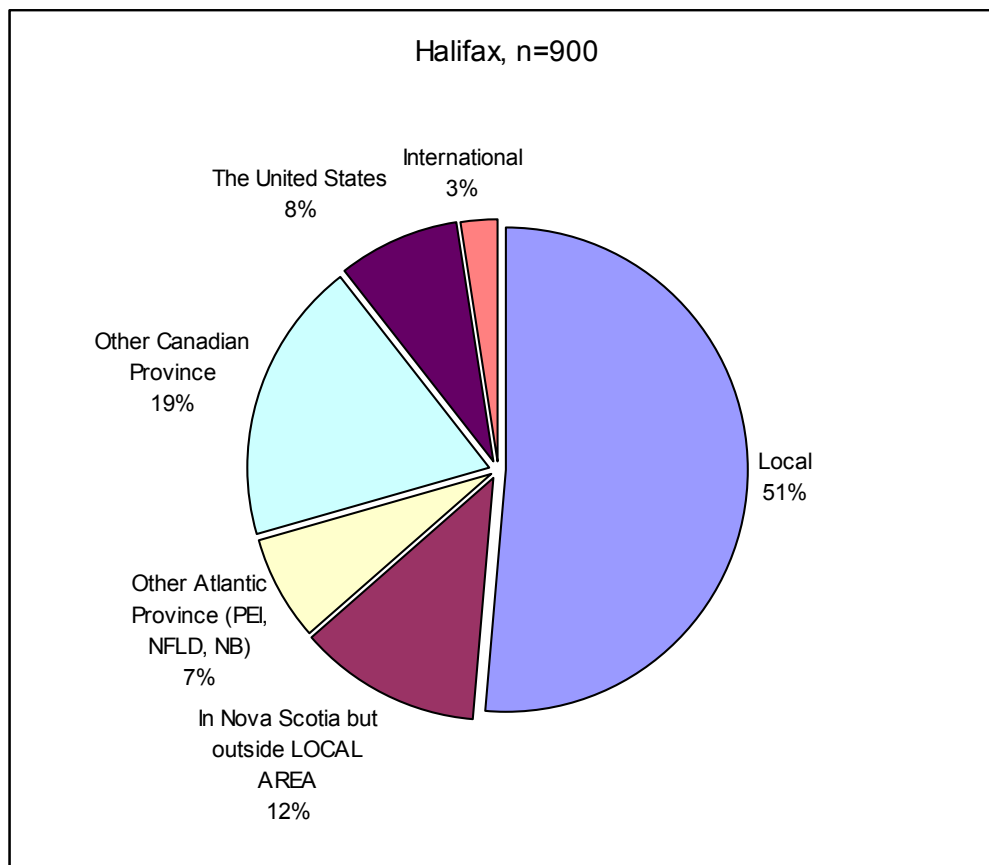
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- In Nova Scotia but outside HRM – 12.20%
- Other Atlantic Province (PEI, NFLD, NB) – 6.87%
- Other Canadian Province – 19.07%
- The United States – 7.87%
- Countries other than Canada or USA (specify) – 2.55%

<b>Table 5 – Where is your usual place of residence? (Halifax Port Set)</b>		
<b>Answer options</b>	<b>Response Percent</b>	<b>Response Count</b>
HRM Responses	51.44%	464
Non HRM	48.56%	438
<b>answered question</b>		<b>902</b>



**Figure 12 – Halifax Port Tall Ships Participants by Origin**

The combined distribution of all Halifax Port Tall Ships Participants is presented in **Figure 12**, with 900 people responding to this question.

## 2.6 OUT PORTS SURVEY SET

Participants at the Out Ports were more likely to be from the local area (65.98% were from the local area in the Out Ports compared to 51.44% in Halifax Port). This is summarized in the following table:

<b>Table 6 – Where is your usual place of residence? (Out Port Set)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
LOCAL AREA	65.98%	289
Non LOCAL AREA	34.02%	149
<b>answered question</b>		<b>438</b>

Of the 149 Out Port respondents who were not from the local area, 132 indicated their usual place of residency as:

- In Nova Scotia but outside local area – 48.48%
- Other Atlantic Provinces (PEI, NFLD, NB) – 7.58%
- Other Canadian Provinces – 31.82%
- The United States – 12.12%
- Countries other than Canada or USA – 4.55%

### 2.6.1 OUT PORT AND HALIFAX PORT COMBINED (NS SURVEY SET)

Considering the two sub-sets (Halifax Port and Out Ports) together:

- 57% identified themselves as from the “local area” (The local area was defined as Halifax Port (for the Halifax Port Tall Ships Event) and within a 30 minute drive of all other Ports.);
- 13% were from within Nova Scotia but outside the local area; and
- 30% were from outside Nova Scotia, distributed as follows:
  - Other Canadian Provinces – 16%
  - The United States – 7%
  - Other Atlantic Provinces – 5%
  - International – 2%.

**Figure 13** presents a summary of the origin of all visitors to the Nova Scotia Tall Ships 2007 Festival.

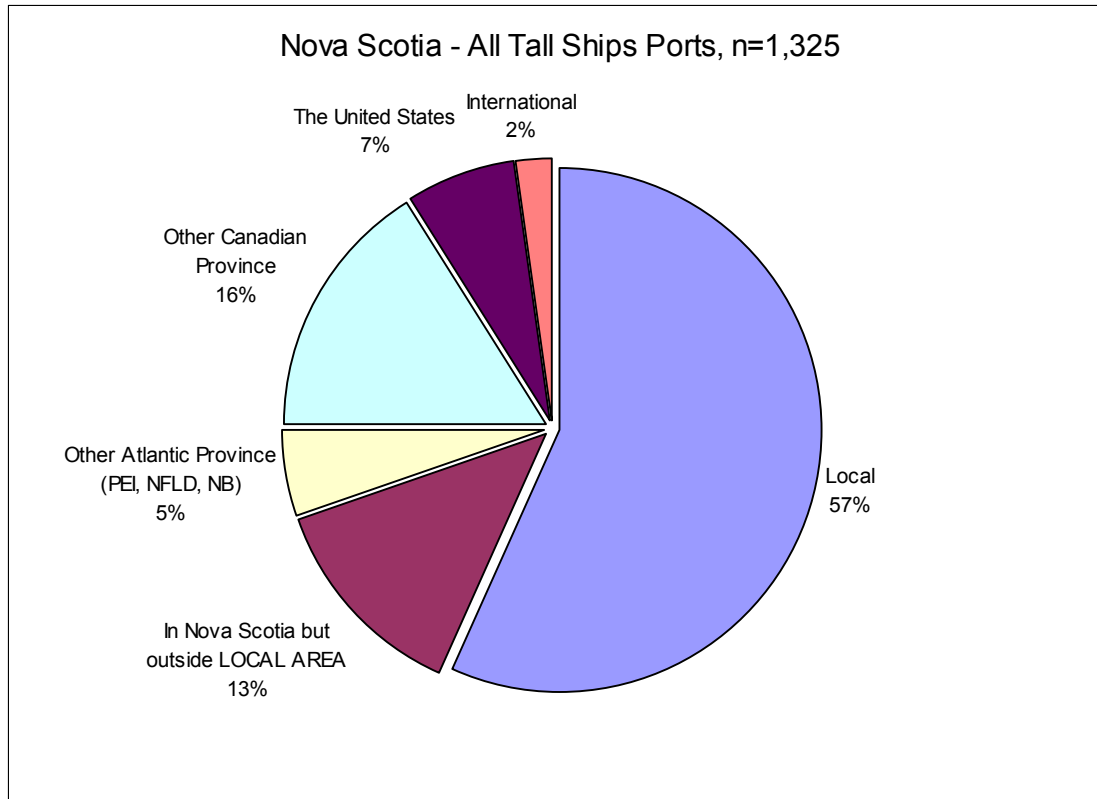


Figure 13 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – All Ports

## 2.6.2 SELECTED OUT PORTS

Figures 15 to 19 illustrate the visitor origin of Tall Ships Attendees in the ports of<sup>6</sup>:

- Yarmouth
- Shelburne
- Louisbourg
- Sydney
- Pictou

Insufficient data were received from Lunenburg and Port Hawkesbury to provide statistically reliable results.

<sup>6</sup> Confidence interval +/- 10 percentage points, 19 times out of 20, except for Sydney, which is +/- 8 percentage points.



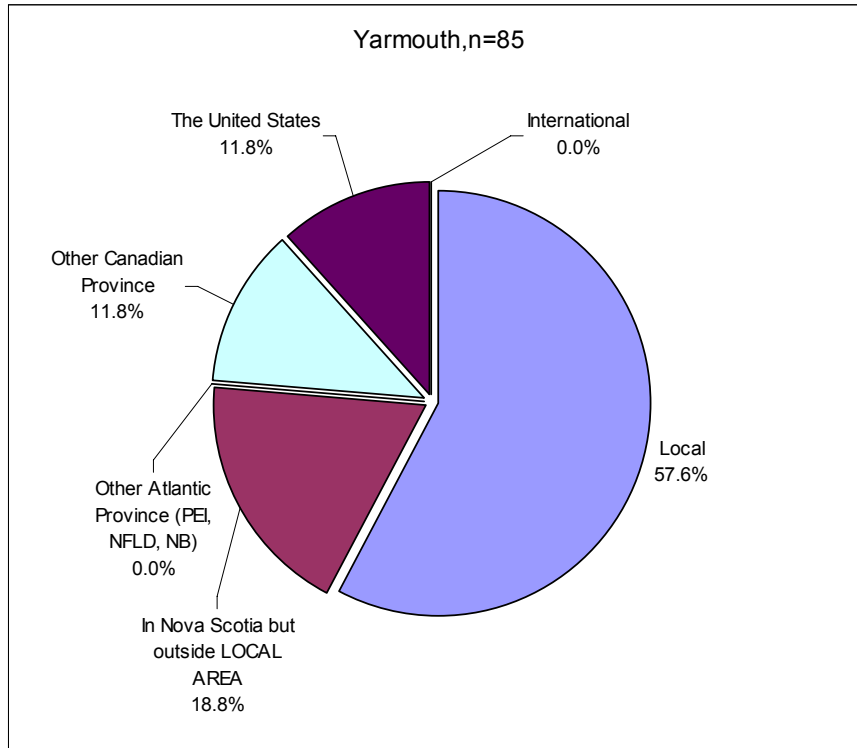


Figure 14 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – Yarmouth

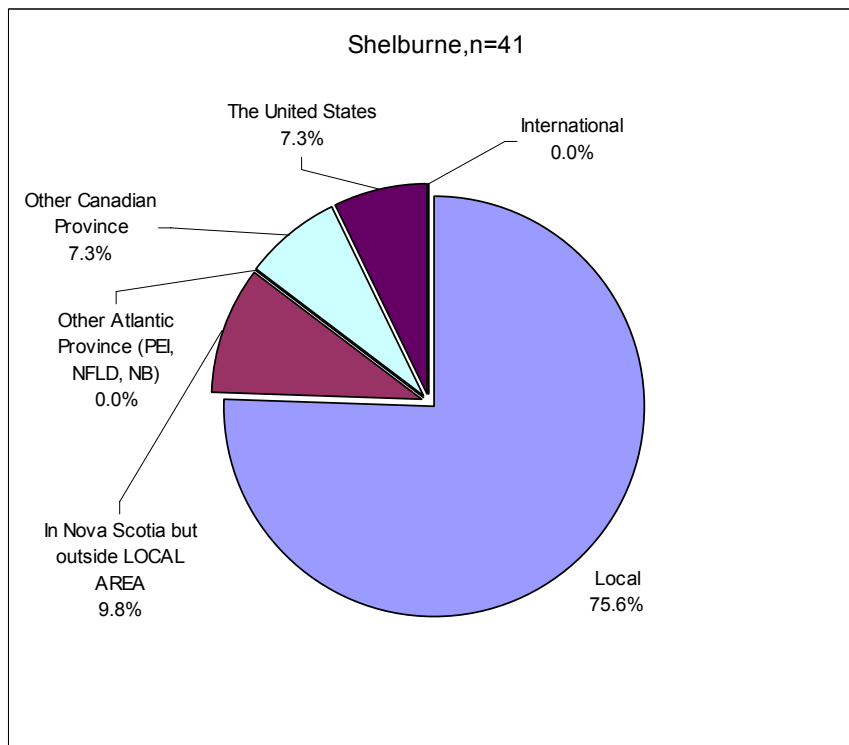


Figure 15 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – Shelburne

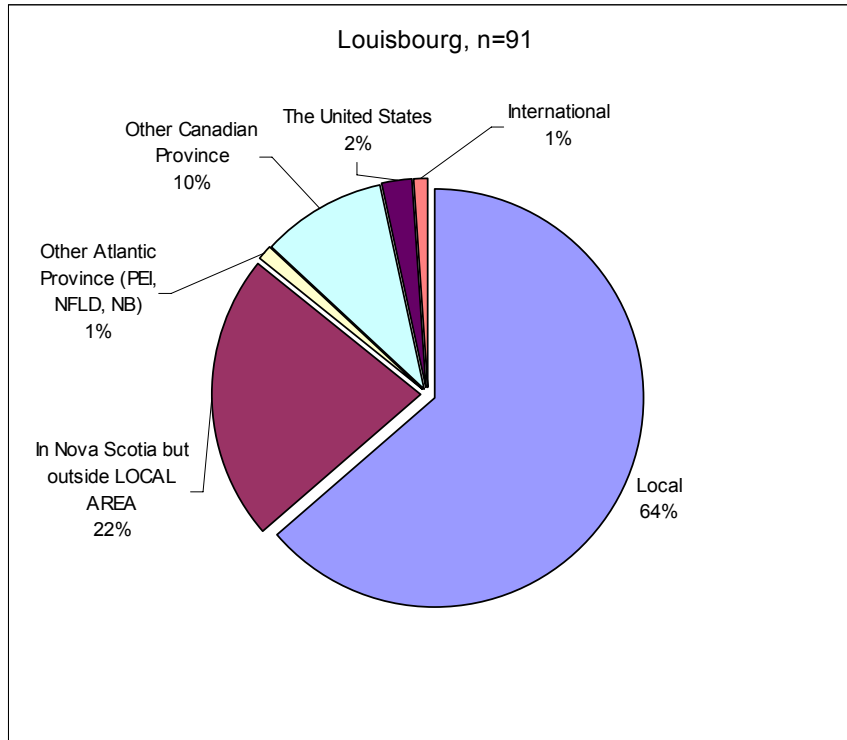


Figure 16 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – Louisbourg

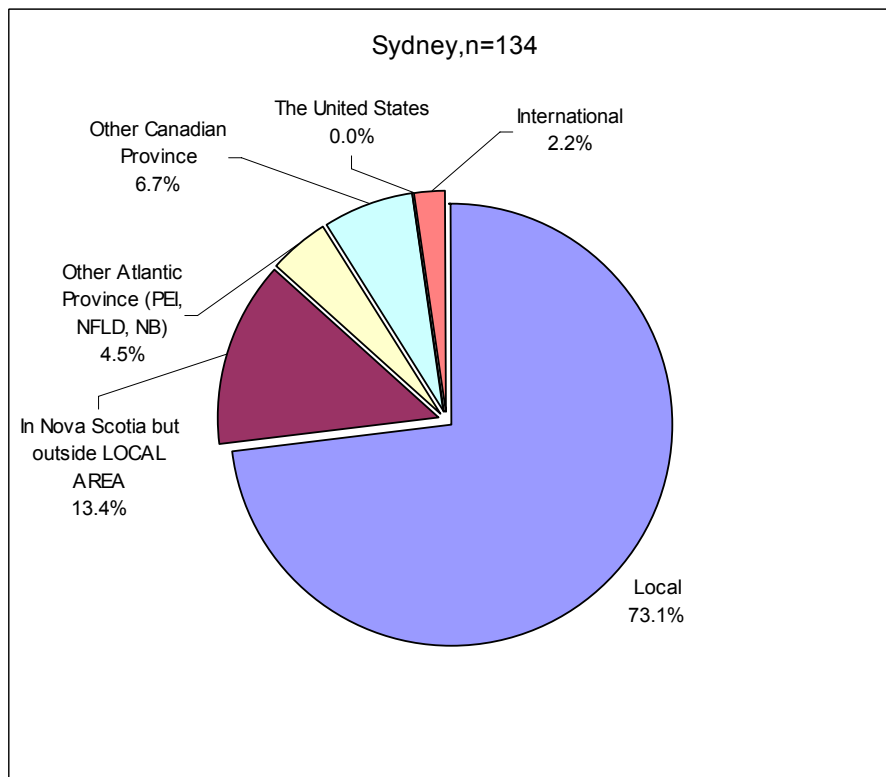


Figure 17 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – Sydney

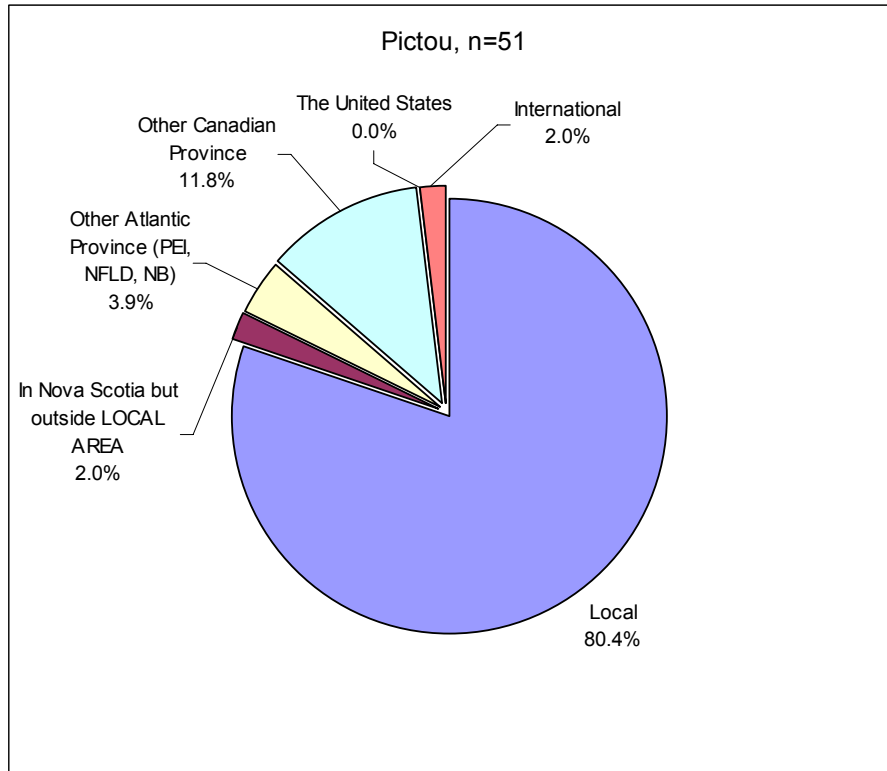


Figure 18 – Visitor Origin, Tall Ships Nova Scotia Festival 2007 – Pictou

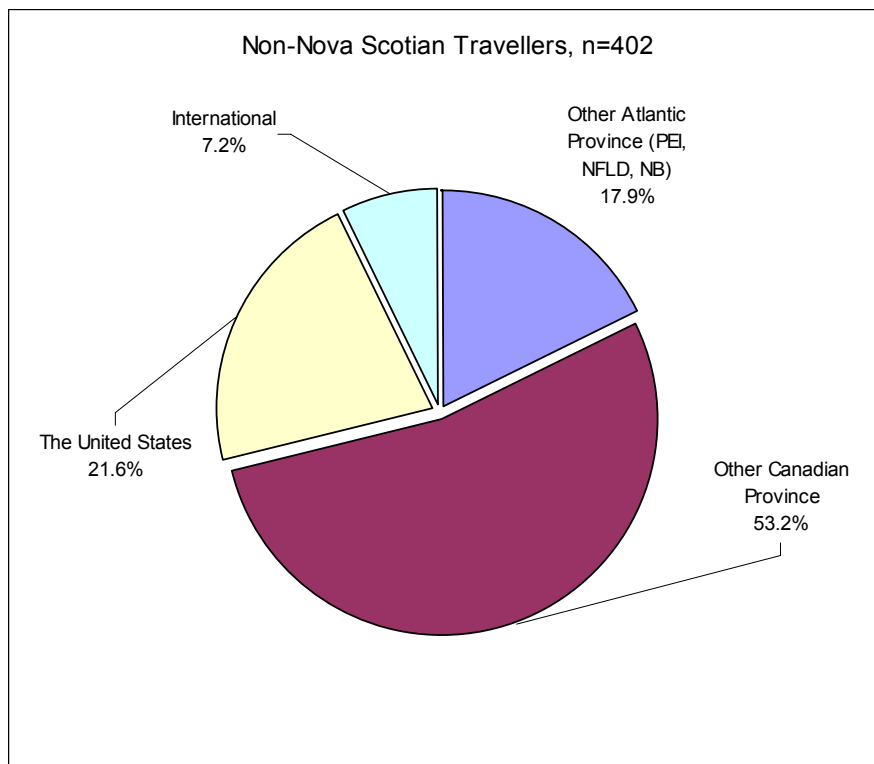


Figure 19 – Non-NS Visitor Origin, Tall Ships Nova Scotia Festival 2007

**Figure 19** (above) provides the distribution of Non Nova Scotia Visitors by point of origin.<sup>7</sup>

## 2.7 DAILY EXPENDITURE IN RELATION TO TALL SHIPS

All local visitors were asked to provide their planned or expected expenditure in relation to their visit to Tall Ships during the day on which they were surveyed.<sup>8</sup> **Table 7** provides a summary of the 693 responses that were provided to this question.

<b>Table 7 – Daily Expenditures In Relation To Tall Ships (Local Attendees)</b>			
Data	Halifax Port	Out Ports	Nova Scotia
Number reporting	452	241	693
Average Tall Ships Daily Spending per Local visitor	\$46.60	\$19.77	\$37.27

Average local spending was \$46.60 per Halifax Port visitor, \$19.77 per Out Port visitor, and \$37.27 overall.

## 2.8 TALL SHIPS & MOTIVATION TO VISIT WATERFRONT

Survey participants were asked: Did you come to the waterfront today specifically to attend the Tall Ships event?

<b>Table 8 – Day Visit and Motivation (All Attendees)</b>			
Was Tall Ships the Reason for you being in....	Halifax Port	Out Ports	Grand Total
Yes	400	237	637
No	59	25	84
<b>Total</b>	<b>459</b>	<b>262</b>	<b>721</b>

The impact of Tall Ships in motivating trips to the waterfronts is presented in **Table 8** and **Figure 20**.

<sup>7</sup> US visitation was influenced by a cruise ship visiting the port of Halifax on July 13th, however since none of these visitors were motivated to come to NS because of Tall Ships, they are not weighted in the assessment of Tall Ships motivated non-NS visitor spending.

<sup>8</sup> Non-local residents were also asked this question, however this value is assumed to be included in the sum of expenses they provided in relation to their travel in NS.

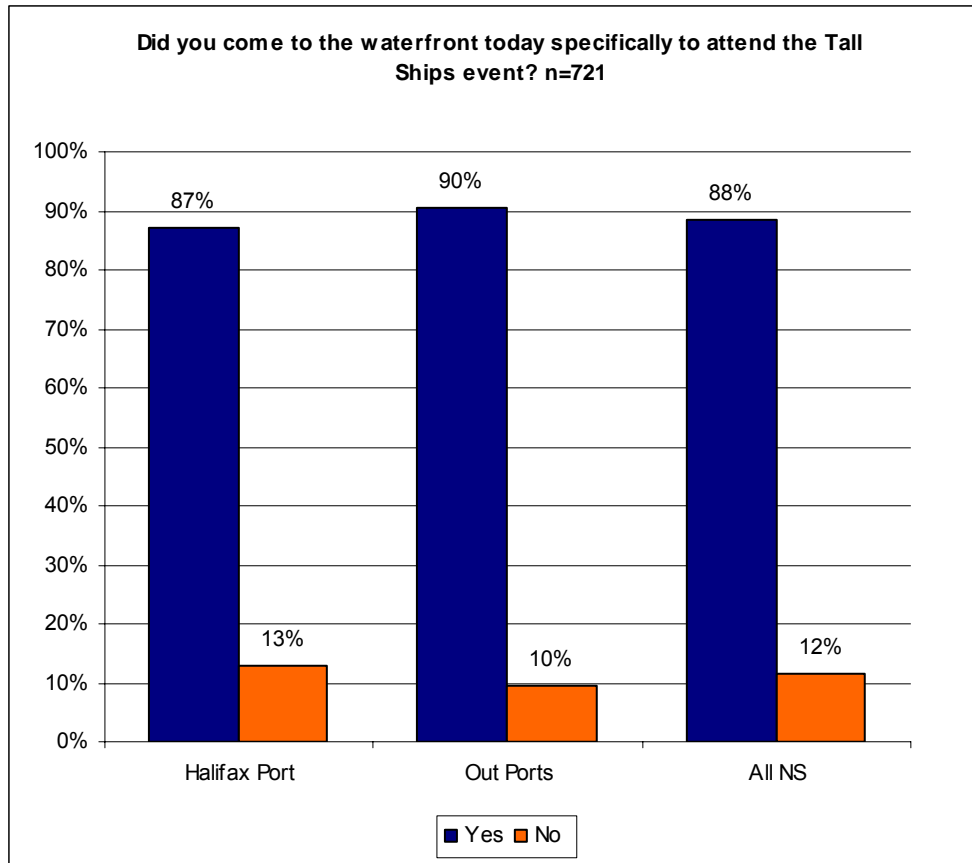


Figure 20 – Reason for Visit to the Waterfront

The Tall Ships Festival was the reason for the majority of visits to the waterfronts among those survey participants responding to this question. It was the reason for 87% of the Halifax Port visitors and 90% of the Out Ports Tall Ships visitors to the waterfront. Overall, Tall Ships was the reason for 88% of all surveyed visitors to the Waterfront during Tall Ships Nova Scotia Festival 2007. Across Nova Scotia, 67 respondents identified other main reasons including:

- Work/business meetings in the area – 26.87%
- Shopping – 20.90%
- Restaurant visit/meal – 11.94%
- General sightseeing – 46.27%
- Other (specify) – 35.82%

## 2.9 TALL SHIPS & MOTIVATION FOR TRAVEL IN NS

Question 8 of the intercept survey asked about the role of *Tall Ships Nova Scotia Festival 2007* in motivating non-local people to travel to Nova Scotia as follows:

*How important was Tall Ships in your decision to travel in Nova Scotia? Zero indicates “no influence” and 10 indicates “Tall Ships is the reason for your travel in Nova Scotia.”*

**Table 9** shows that, for nearly 50% of the respondents, Tall Ships was more than 50% of the reason they choose to travel in Nova Scotia. For 34.1% of the respondents, Tall Ships was the reason they were travelling in Nova Scotia.

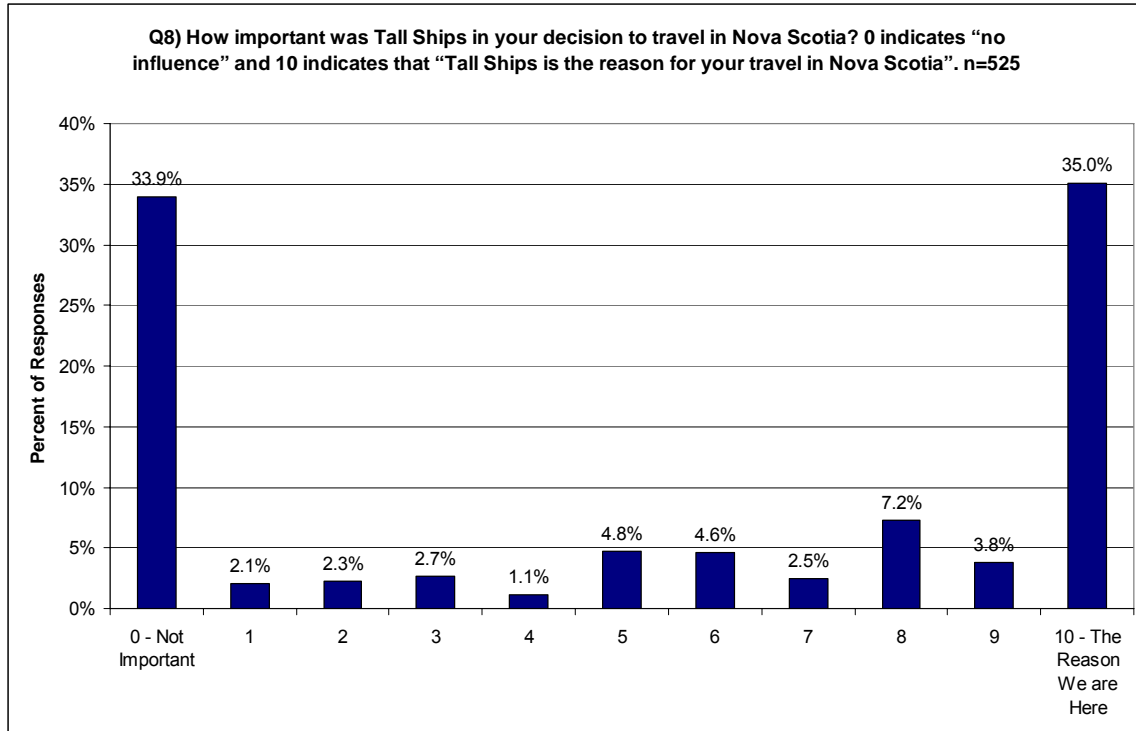
<b>Table 9 – Motivation to Travel in NS, by Port</b>			
Importance of Tall Ships	Halifax Port	Out Ports	All NS Ports
<b>0 - No Importance</b>	33.96%	34.31%	33.90%
<b>1</b>	2.12%	1.96%	2.10%
<b>2</b>	1.65%	4.90%	2.29%
<b>3</b>	2.12%	4.90%	2.67%
<b>4</b>	1.18%	0.98%	1.14%
<b>5</b>	3.54%	8.82%	4.76%
<b>6</b>	4.48%	5.88%	4.57%
<b>7</b>	1.89%	4.90%	2.48%
<b>8</b>	7.31%	6.86%	7.24%
<b>9</b>	3.54%	4.90%	3.81%
<b>10 - The Reason We Are Here</b>	38.21%	21.57%	35.05%
<b>Grand Total</b>	100.00%	100.00%	100.00%

The average 'motivation' indicated by non local (outside the port area) visitors to the:

- Halifax Port was just under 54%, meaning that Tall Ships Nova Scotia Festival 2007 was, on average, nearly 54% of the reason for their travel in Nova Scotia.
- Out Ports was 46% of the reason; and
- Province wide, Tall Ships Nova Scotia Festival 2007 was 52% of the reason for travel in Nova Scotia by non-local Tall Ships attendees.

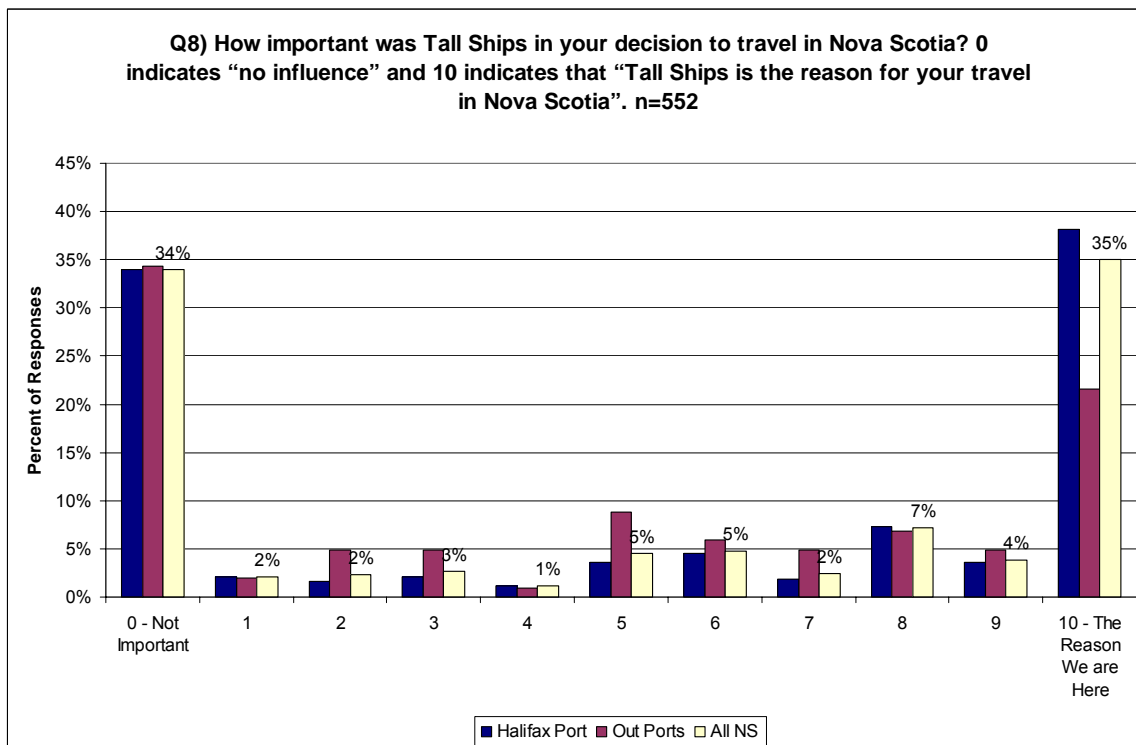
When considering only non-Nova Scotian Tall Ships attendees, the Tall Ships Festival was 47.94% of their reason for travel in the province.

**Figure 21** provides more detail on the range in the extent to which Tall Ships Nova Scotia Festival 2007 motivated non-local attendees to travel in Nova Scotia.



**Figure 21 – Role of Tall Ships in Motivating Travel to NS, All Ports**

The effective motivation of Tall Ships on NS travel for each set (Halifax Port Set, Out Ports Set and NS) is shown in **Figure 22**.



**Figure 22 – Role of Tall Ships in Motivating Travel to NS by Survey Set**

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**Table 10** describes the level of importance of Tall Ships in motivating travellers by traveller origin. Attendees who were from Nova Scotia (but outside the local area) and travellers from other Atlantic Provinces were mostly likely to say that Tall Ships was “The reason we are here” (62% and 42% respectively). See **Appendix C – Statistical Summary** for further details on trip motivation by origin of Tall Ships attendee.

<b>Table 10 – Motivation of Tall Ships in Causing Non-Local Travel in NS n=525</b>						
	<b>Nova Scotia but outside Local Area</b>	<b>Other Atlantic Province</b>	<b>Other Canadian Province</b>	<b>United States</b>	<b>International</b>	<b>Overall</b>
<b>0 - No Importance</b>	7.8%	23.9%	39.0%	67.1%	57.7%	33.90%
<b>1</b>	0.7%	2.8%	3.9%	0.0%	0.0%	2.10%
<b>2</b>	2.8%	1.4%	2.9%	0.0%	3.8%	2.29%
<b>3</b>	2.1%	0.0%	3.9%	2.4%	3.8%	2.67%
<b>4</b>	0.0%	0.0%	2.4%	0.0%	3.8%	1.14%
<b>5</b>	5.0%	2.8%	6.8%	1.2%	3.8%	4.76%
<b>6</b>	4.3%	2.8%	3.4%	9.8%	3.8%	4.57%
<b>7</b>	1.4%	5.6%	2.0%	1.2%	7.7%	2.48%
<b>8</b>	6.4%	11.3%	6.8%	7.3%	3.8%	7.24%
<b>9</b>	7.1%	7.0%	2.0%	1.2%	0.0%	3.81%
<b>10 - The Reason We Are Here</b>	62.4%	42.3%	26.8%	9.8%	11.5%	35.05%

International travellers and US travellers were least likely to identify Tall Ships as “The Reason” for their travel in NS and, conversely, more likely to indicate Tall Ships was less important in motivating their trip to NS.

Among the out-of-province points of origin, Tall Ships was for the average attendee:

- 65% of the reason for travel among those from Other Atlantic Province
- 44% for those from Other Canadian Province
- 25% for travellers from the United State
- 28% of the reason for travel among International travelers

**Among non-Nova Scotian Tall Ships attendees, the Tall Ships Festival was 47.94% of their reason for travel in the province, based on 321 responses.**

***The information about the motivation for visitor travel in NS was essential to determining the difference between the gross Tall Ships spending and incremental visitor spending.***

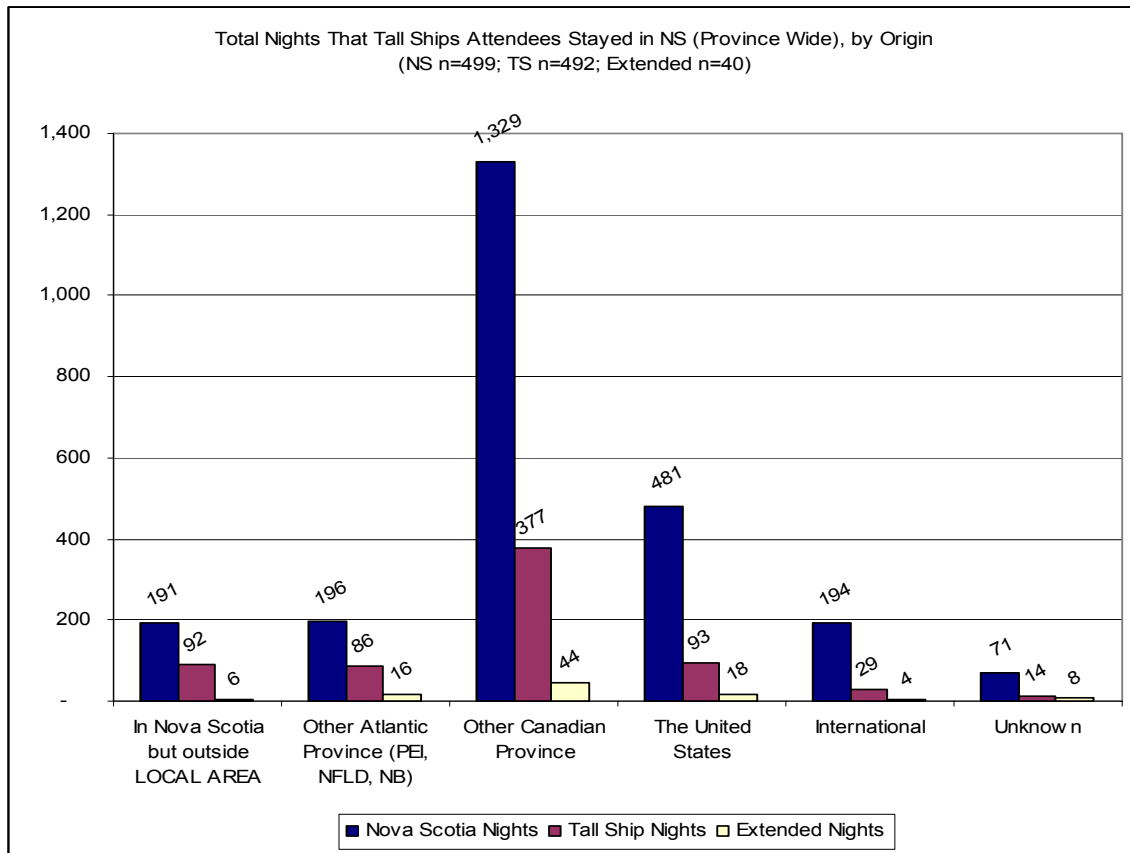
## **2.10 TRAVEL NIGHTS IN NOVA SCOTIA**

Question 11 asked survey participants “How many nights of your current trip will you spend in Nova Scotia away from your home?” and “How many of these nights in NS are because of the Tall Ships event?”

**Figure 23** presents the summary of total nights stayed from all survey participants (all NS, Halifax Port Set and Out Ports Set).

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**Figure 23 – NS Nights, Tall Ship Nights and Nights Extended by Tall Ships**

Survey participants indicated they had planned to stay in NS 2,462 nights (499 people answered this question) and that 691 were allocated to attending Tall Ships.

### 2.11 EXTENDED NIGHTS

Survey participants were asked “Did you extend your travel in Nova Scotia because of the Tall Ships event?” About 10.3% (54) indicated they did extend their stay (**Figure 24**). Only forty gave a specific number of days. This forty said they intended to stay 96 additional nights in NS due to the influence of Tall Ships Nova 2007 (shown in **Table 11** and **Figure 25**).

The 96 extended nights describe the extent to which survey respondents either reallocated or increased their travel time budget, due to the influence of Tall Ships, to spend more nights in NS than they originally anticipated. (The extended nights are included in the 691 total).

**Table 11** provides a summary of information provided by survey participants on the number of nights they stayed in Nova Scotia, in relation to Tall Ships, and the number of extended nights due to Tall Ships.

<b>Table 11 – Nights in NS, by Visitor Origin and Survey Set n=499</b>			
<b>Nova Scotia Nights, n=499</b>	<b>Halifax Port</b>	<b>Out Ports</b>	<b>All NS</b>
In Nova Scotia but outside Local Area	84	107	191
Other Atlantic Province (PEI, NFLD, NB)	166	30	196
Other Canadian Province	1070	259	1329
The United States	387	94	481
International	156	38	194
Unknown Origin	54	17	71
<b>Total Nova Scotia Nights</b>	<b>1917</b>	<b>545</b>	<b>2462</b>
<b>Tall Ship Nights, n=492</b>			
In Nova Scotia but outside Local Area	64	28	92
Other Atlantic Province (PEI, NFLD, NB)	72	14	86
Other Canadian Province	326	51	377
The United States	86	7	93
International	26	3	29
Unknown Origin	11	3	14
<b>Total Tall Ships Nights</b>	<b>585</b>	<b>106</b>	<b>691</b>
<b>Extended Nights, n=40</b>			
In Nova Scotia but outside Local Area	1	5	6
Other Atlantic Province (PEI, NFLD, NB)	15	1	16
Other Canadian Province	30	14	44
The United States	18		18
International	3	1	4
Unknown Origin	8		8
<b>Total Tall Ships Nights</b>	<b>75</b>	<b>21</b>	<b>96</b>

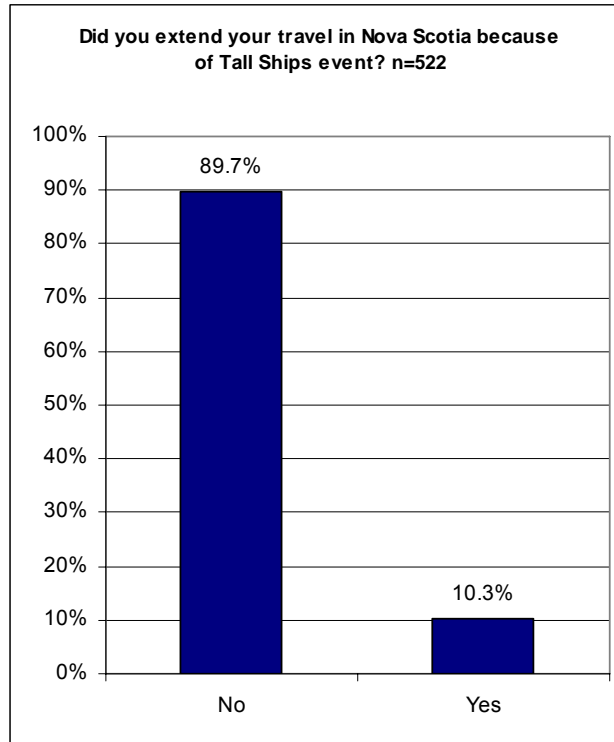


Figure 24 – Probability of Tall Ships Extending Visitor Stays

Figure 25 presents an alternative summary of the number of nights stayed and the influence of Tall Ships.

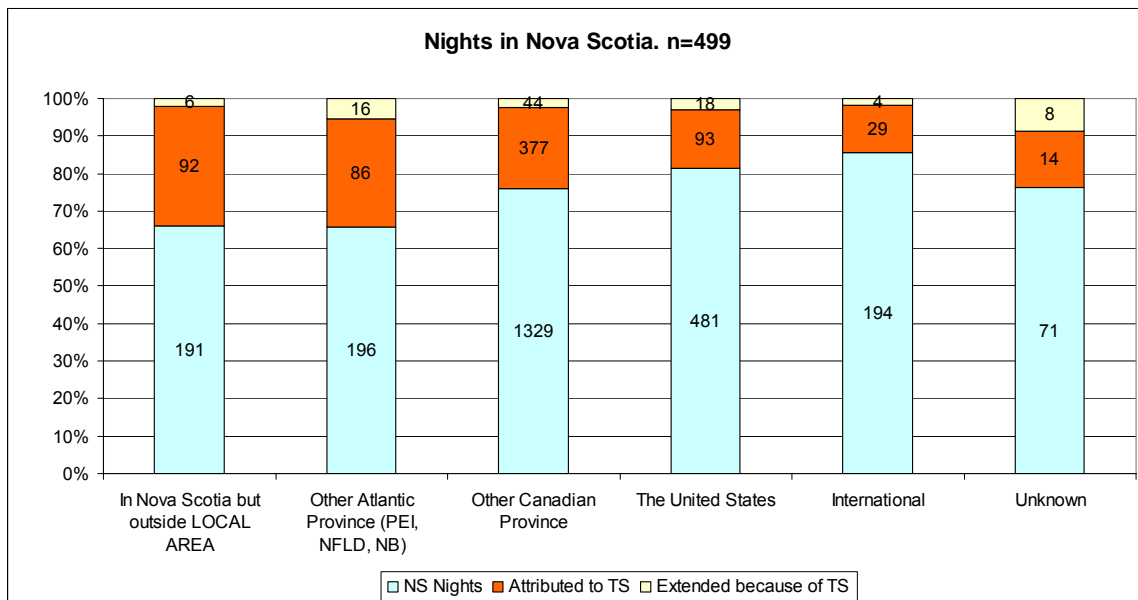


Figure 25 – Number of NS Nights, Tall Ship and Extended Nights by Origin

## 2.12 TOTAL EXPENDITURES ESTIMATES

Question 11 was the first of two similar questions designed to address the trip expenditures of non-local visitors to Tall Ships Ports. Non-local Tall Ships attendees were asked:

**“In total, how much do you estimate you will spend in Nova Scotia during this trip [IN CANADIAN CURRENCY]?”<sup>9</sup>**

A total of 452 survey participants provided responses, with an average anticipated per party expenditure of **\$1,266.78** per trip to Nova Scotia.

Average total trip spending by origin was as follows:

- \$256.91 – In Nova Scotia but outside local area
- \$675.58 – Other Atlantic Province (PEI, NFLD, NB)
- \$1,787.95 – Other Canadian Province
- \$1,973.75 – The United States
- \$1,700.00 – International

The average total expenditure for non-Nova Scotians was **\$1,617.89** per party trip, as reported by 352 respondents.<sup>10</sup>

## 2.13 DETAILED EXPENDITURES ESTIMATES

Question 12, the second trip expenditure question, asked the survey participant for more detailed information about NS trip related spending. A summary of spending is provided in **Table 12**.

<b>Table 12 – Non Local Resident Spending per Party by Type of Expenses, n=471</b>				
	<b>Spending Type</b>	<b>Halifax Port</b>	<b>Out Ports</b>	<b>Grand Total</b>
	Air fares (in and out of Nova Scotia)	\$311.61	\$209.02	\$297.89
	Ferries (e.g., US/NB/PEI/NFLD)	\$32.14	\$80.17	\$38.56
	Car rental	\$108.32	\$92.86	\$106.25
	Taxis, Limousine Services	\$5.96	\$6.35	\$6.01
	Fuel	\$145.89	\$178.89	\$150.30
	Auto repairs	\$5.63	\$1.11	\$5.03
	Fixed roof Accommodation (e.g., hotel)	\$380.97	\$253.33	\$363.89
	Campgrounds	\$20.47	\$57.78	\$25.46
	Meals and beverages in restaurants (food/drink)	\$306.48	\$284.57	\$303.55
	Groceries/liquor	\$71.02	\$124.13	\$78.13
	Visual arts (a)	\$8.52	\$11.11	\$8.86
	Handicrafts (b)	\$32.15	\$100.30	\$41.27
	<i>Art &amp; Crafts (=a +b)</i>	\$40.67	\$111.41	\$50.13
	Jewellery	\$25.59	\$12.84	\$23.88
	NS Music and NS Books	\$8.55	\$8.30	\$8.51
	Clothing	\$53.70	\$47.35	\$52.85
	Textiles (bags, fabric)	\$2.45	\$1.03	\$2.26

<sup>9</sup> Question 11 on the Tall Ships 2007 Economic Impact Assessment Visitor Intercept Survey

<sup>10</sup> Excludes survey responses where the participant's origin was not specified.

	Entertainment (e.g., live performances)	\$16.77	\$32.62	\$18.89
	Museums, art galleries, etc.	\$13.79	\$22.24	\$14.92
	Casino, VLTs, etc.	\$26.29	\$4.92	\$23.43
	Recreational activities (e.g., green fees)	\$13.72	\$28.25	\$15.67
	Personal Care (hair, salons, spas, etc.)	\$3.38	\$11.27	\$4.43
	Other items	\$8.02	\$15.24	\$8.99
	<b>Average Party</b>	<b>3.14</b>	<b>2.82</b>	<b>3.05</b>
	<b>Average Sum of Spending</b>	<b>\$1,601.41</b>	<b>\$1,583.67</b>	<b>\$1,599.04</b>

Survey participants from outside the local area and travelling in NS spent an average of \$1,599 per party while travelling in NS. Per party expenditure for the Halifax Port survey participants was slightly higher than the average for the Out Port survey participants (\$1,601 compared to \$1,584). A total of 471 observations provided usable data.

The 'lump sum' estimate of spending reported in Q11 was often lower than the spending reported in Q12. Interviewers reported that when asked to breakdown spending the respondents often identified spending that they had forgotten to consider when asked to state an overall estimate. Therefore, spending information generated from Question 11 is treated as the low estimate of per party spending.

Question 12 is considered more accurate because the detail asked in Question 12 reminded survey participants of expenditure categories that should have been included or excluded in their initial 'lump sum' response to the question of how much would be spent during travel in NS.

**Table 13** presents visitor spending by origin. This table includes:

- Per person daily spending while at the Tall Ships event
- Average per party spending from Question 11 (the lump sum estimate)
- Average sum of per party spending from Question 12 (based on a detailed breakdown)

<b>Table 13 – Visitor Spending by Origin and Survey Set</b>				
Origin	Spending Categories	Halifax Port	Out Ports	All NS
Local	Average of Daily Tall Ships Spending	\$46.60	\$19.71	\$37.22
	Average Spending (Q11)	N/A	N/A	N/A
	Average Spending (Q12)	N/A	N/A	N/A
In Nova Scotia but outside LOCAL AREA	Average of Daily Tall Ships Spending	\$45.00	\$28.17	\$29.85
	Average Spending (Q11)	\$256.91	\$299.05	\$264.41
	Average Spending (Q12)	\$320.46	\$527.27	\$348.41
Other Atlantic Province (PEI, NFLD, NB)	Average of Daily Tall Ships Spending	N/A	N/A	N/A
	Average Spending (Q11)	\$675.58	\$996.88	\$718.42
	Average Spending (Q12)	\$774.97	\$534.50	\$746.68
Other Canadian Province	Average of Daily Tall Ships Spending	N/A	N/A	N/A
	Average Spending (Q11)	\$1,787.95	\$1,938.00	\$1,809.88
	Average Spending (Q12)	\$2,313.40	\$2,553.98	\$2,345.91
The United States	Average of Daily Tall Ships Spending	N/A	N/A	N/A
	Average Spending (Q11)	\$1,973.75	\$1,391.67	\$1,923.86

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	Average Spending (Q12)	\$2,048.83	\$1,282.78	\$1,956.91
International	Average of Daily Tall Ships Spending	N/A	N/A	N/A
	Average Spending (Q11)	\$1,700.00	\$1,250.00	\$1,652.63
	Average Spending (Q12)	\$2,900.48	\$2,791.67	\$2,886.88
	Average of Daily Tall Ships Spending	\$46.59	\$20.38	\$37.02
Average Total Spending (Q11)		\$1,263.69	\$1,186.37	\$1,252.77
<i>Number reporting</i>		376	62	438
Average Total Spending (Q12)		\$1,592.97	\$1,599.24	\$1,593.78
<i>Number reporting</i>		403	60	463

The overall average for non-Nova Scotia per party spending is provided in **Table 14**.

<b>Table 14 – Non-NS Visitor Spending by Origin and Survey Set<sup>11</sup></b>				
Other Atlantic Province (PEI, NFLD, NB)	Average Spending (Q11)	\$675.58	\$996.88	\$718.42
	Average Spending (Q12)	\$774.97	\$534.50	\$746.68
Other Canadian Province	Average Spending (Q11)	\$1,787.95	\$1,938.00	\$1,809.88
	Average Spending (Q12)	\$2,313.40	\$2,553.98	\$2,345.91
The United States	Average Spending (Q11)	\$1,973.75	\$1,391.67	\$1,923.86
	Average Spending (Q12)	\$2,048.83	\$1,282.78	\$1,956.91
International	Average Spending (Q11)	\$1,700.00	\$1,250.00	\$1,652.63
	Average Spending (Q12)	\$2,900.48	\$2,791.67	\$2,886.88
Average Spending (Q11)		\$1,617.89	\$1,640.85	\$1,620.83
<i>Number reporting</i>		279	41	320
Average Spending (Q12)		\$1,996.01	\$1,956.57	\$1,990.97
<i>Number reporting</i>		307	45	352

## 2.14 OVERALL SATISFACTION WITH TALL SHIPS

Survey participants were overwhelmingly satisfied with their experiences at the Nova Scotia Tall Ships 2007 Festival, as shown in **Figure 26** and **Table 15**.

<sup>11</sup> For the purpose of analysis, spending information generated from Question 11 is treated as the low estimate of per party spending and Question 12 is considered more accurate. As noted, this is because with the detail asked in Question 12, survey participants were reminded of expenditure categories that should have been included in their initial response to the questions, how much will you spend in NS on your travel in NS. This resulted in upward and downward adjustments to estimates given in Question 11.

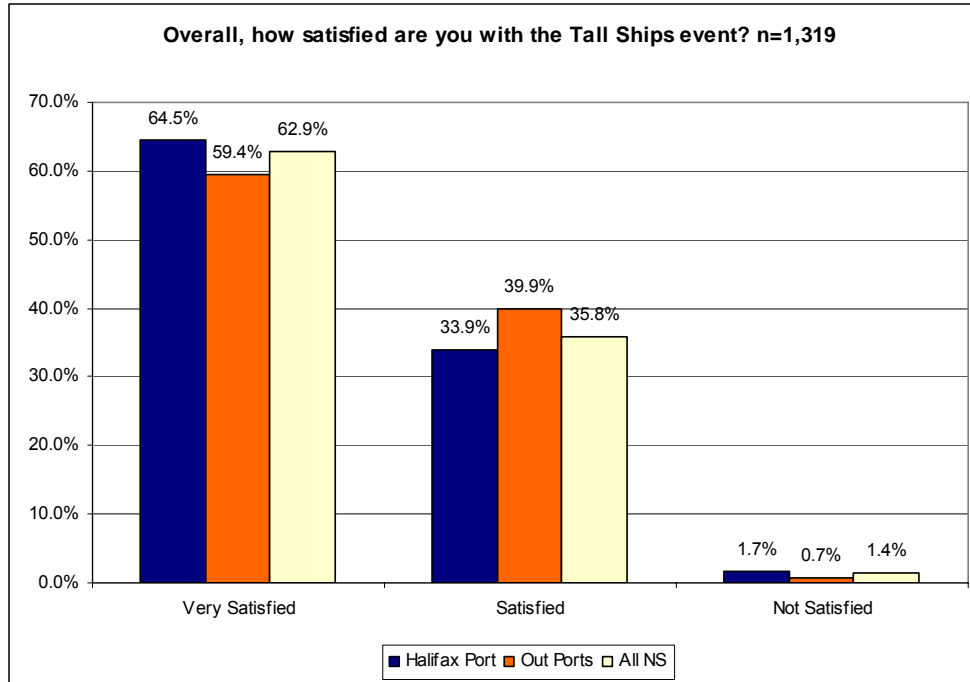


Figure 26 – Level of Satisfaction with Tall Ships 2007

Table 15 – Overall, how satisfied are you with the Tall Ships event?		
Level of Satisfaction	Response Percent	Response Count
<b>Halifax Port</b>		
Not Satisfied	1.68%	15
Satisfied	33.85%	303
Very Satisfied	64.47%	577
<b>answered question</b>		<b>895</b>
<b>Out Ports</b>		
Not Satisfied	0.71%	3
Satisfied	39.86%	169
Very Satisfied	59.43%	252
<b>answered question</b>		<b>424</b>
<b>NS Wide</b>		
Not Satisfied	1.36%	18
Satisfied	35.78%	472
Very Satisfied	62.85%	829
<b>answered question</b>		<b>1,319</b>

## 2.15 PLANS TO VISIT OTHER PORTS

Most survey participants (72%) were not intending to visit other ports to see the Tall Ships.

Among those who were planning to travel to other ports to see the Tall Ships, Lunenburg (8%), Sydney (5%), and Louisbourg (4%) were cited most often as ``likely to be visited`` of all the next Tall Ships Ports to visit, as shown in **Table 16**.

<b>Table 16 – Plans to Visit Other Tall Ships Ports</b>						
<b>Answer Options</b>	<b>Halifax Port</b>		<b>Out Ports Set</b>		<b>Combined Set</b>	
	<b>Response %</b>	<b>Response #</b>	<b>Response %</b>	<b>Response #</b>	<b>Response %</b>	<b>Response #</b>
Yes						
Louisbourg	2.46%	22	7.67%	31	4.08%	53
Lunenburg	11.19%	100	0.74%	3	7.94%	103
Halifax	0.00%	0	5.45%	22	1.69%	22
Pictou	3.24%	29	0.74%	3	2.47%	32
Port Hawkesbury	0.67%	6	0.74%	3	0.69%	9
Shelburne	1.68%	15	1.49%	6	1.62%	21
Sydney	3.02%	27	10.64%	43	5.39%	70
Yarmouth	2.01%	18	0.74%	3	1.62%	21
No	75.50%	675	63.37%	256	71.73%	931
Not Sure	7.16%	64	11.63%	47	4.93%	64
<b>Answered question</b>		<b>894</b>		<b>404</b>		<b>1298</b>
<b>skipped question</b>		<b>17</b>		<b>37</b>		<b>54</b>

Halifax Port survey participants were less likely to visit other ports (76% said “no”) than Out Port Survey Respondents (63% said “no”).

### 2.15.1 PROBABILITY OF VISITING ANOTHER PORT, BASED ON THE PARTY’S ORIGIN

**Table 17** shows the intentions of survey participants to visit other ports, based on their origin.

<b>Table 17 – Plans to visit other ports in Nova Scotia to see the Tall Ships, by Origin</b>								
Port	Local	In NS, outside Local Area	Other Atlantic Province	Other Can. Province	United States	Inter-national	Unknown	All NS
Pictou	1%	6%	1%	1%	4%	3%	11%	2%
Sydney	5%	11%	3%	2%	2%	3%	6%	5%
Port Hawkesbury	1%	0%	0%	0%	1%	0%	0%	1%
Halifax	1%	6%	0%	0%	1%	0%	6%	2%
Louisbourg	4%	4%	1%	4%	5%	3%	17%	4%
Lunenburg	5%	10%	1%	14%	8%	21%	6%	8%
Shelburne	1%	2%	1%	0%	4%	12%	0%	2%
Yarmouth	1%	1%	0%	1%	6%	6%	6%	2%
No	71%	54%	84%	70%	64%	48%	50%	68%
Not Sure	10%	7%	8%	6%	4%	3%	0%	8%

Survey participants from the local area are less likely to travel to other ports for the Tall Ships (71% said they would not). International visitors were the most likely to indicate they would visit other Tall Ships Ports (48% said they would), with Lunenburg (21%) and



Shelburne (12%) selected most often as the “other Tall Ships Ports” which the international visitor had visited or planned to visit.

## 2.16 POTENTIAL FOR FOLLOW-UP

A total of 413 individuals indicated a willingness to participate in a follow-up survey and provided contact details for entrance in a draw for Tall Ships souvenirs.

## 2.17 GENDER

Where gender was noted, more females (55%) were interviewed than males (44%).

## 2.18 OPEN COMMENTS

Nearly 600 comments were provided. These reflected a wide variety of opinions including the survey assessment of Tall Ships 2007, the survey and the person administering it. We reviewed the comments for relevance to Tall Ships Nova Scotia Festival 2007. The following summary list reflects the visitors` wants:

- More ships (mentioned 21 times)
- Taller ships (8)
- Less corporate advertising (3)
- More publicity to increase awareness of event (4)
- More info at booths regarding ships, especially when they close for viewing (9)
- Agendas and sailing times of the ships (3)
- Better signage (3)
- Lower prices for boarding (22)
- Lower prices for entertainment (2)
- Lower prices for food (1)
- Increased security (2)
- More parking (5)
- Access to all docks; should not be closed off (5)
- Improved online ticket sales (Canadian) (1)
- Better entertainment / choice of performers (1)
- More entertainment along waterfront (4)
- ATM accessibility (1)
- Alternate timing of Parade of Sails (prefer weekend) (1)
- Improvement in food quality (3)
- More benches for resting (2)
- A beer tent (2)
- Better pedestrian flow / elimination of bottlenecks (5)
- More activities, etc. for kids (2)
- To see sails up (4)
- Wheelchair accessibility (3)
- Improved vendors - not much available, not much for kids, clothing not sized for kids (1)
- More pirate stuff (1)

Visitor ‘wants’ that are beyond the control of event organisers, e.g. the weather, were not included in the above list.

### 3 GROSS AND ATTRIBUTED NON NS SPENDING

Estimates for the total population of Tall Ships Nova Scotia Festival 2007 attendance come from three sources.

Estimates of Out Port Tall Ships attendance were provided by the Out Ports themselves. Out Port Tall Ships attendance is based on ticket sales and/ or boarding pass sales because these were gated events.

The second method was applied to Halifax Port. Attendance estimates were based on sample grid area density counts made by our team. A third estimate was provided by the HRM police.

The Halifax Port crowds are discussed in detail because the resulting estimate is critical in the determination of gross spending. Less detail is used to describe the Out Port attendance because these were largely gated events and ticket sales provided a good proxy for attendance.

#### 3.1 HRM POLICE COUNTS – HALIFAX PORT

The Halifax Regional Police gauged crowds to prepare for staffing needs --- in daily deployment of officers and in day-to-day management and location of officers throughout the site. We understand from the HRM Police that they had planned on and had categorized the 2007 Tall Ships event as an "intermediate sized event" but suggest that the crowd was larger than expected – this is attributed to an approach taken this year that allowed for more access to the zone of Tall Ships activity (rather than blocking streets).

The police used one "live camera" in each of five event zones to monitor crowd and traffic flows. The images, which fed into the mobile command post, gave them a general sense of the flow and concentration of people. HRM police were co-located with EHS staff and received reports from others, including volunteers, concerning vehicular traffic and crowd flow.

HRM Police estimated that there were 50,000 to 60,000 people on the Halifax Waterfront event site during peak hours. The HRM Police took into consideration that they may also need to deal with crowds on the periphery of the event site. In combination the immediate site and periphery **police were prepared to deal with or were dealing with crowds of 570,000 to 630,000 during the five day event (Thursday to Monday inclusive).**

#### 3.2 ESTIMATION HALIFAX PORT SITE CROWDS

Visitors were free to come and go to view the ships without purchasing tickets or otherwise registering their attendance. Therefore, estimating the actual number of attendees becomes an exercise in survey research and sampling theory.

Aerial photography was not available to the consulting team. Therefore, we used a ground-based photo sampling method to estimate the size of the crowd at 12:30 PM,

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4:00 PM and 7:00 p.m. Photos of nine sample areas of the site were taken at these times, each day, from Thursday, July 12 to Sunday, July 15 inclusive and at one time PM on Monday, July 16 during the height of the Parade of Sail. The following methods were applied:

- One-hundred-seventeen photos and 13 images from a private webcam were reviewed to estimate Tall Ships crowd size
- Photos were taken from a height ranging from about 9 feet to 30 feet above the ground to provide a vantage point for crowd counts in the sample areas
- Persons photographed standing in the pre-designated sample area boundaries were counted

About 10-15% of the views were blocked by signage, poles, landscaping and taller persons obscuring shorter persons. Therefore, the counts were increased by these percentages. Finally, an estimate of persons per square metre was calculated.

The overall average number of persons per square metre in the nine sample areas was used as a proxy for the average density for the overall site. The proxy average density per square metre was multiplied by the square metre area of the site.

Members of the consulting team made three complete tours of the site on three different days to monitor relative crowd densities to ensure that the nine sample areas were representative of the total site. The overall average number of persons per square metre in the nine sample areas was used as a proxy for the average density for the overall site. The proxy average density per square metre was multiplied by the square metre area of the site.

The total site area (immediate and adjacent) covered about 10.0 ha (24.63 acres).

The measurement of the immediate venue area was reviewed with Tall Ships Nova Scotia Festival and mapped by **Ekistics Planning and Design**. The footprint of the immediate event site was approximately 4.0 ha (9.97 acres).

An additional 5.9 hectares of area was added to the venue footprint to include:

- Aldernery Gate and adjacent park area
- Sidewalk area of Hollis Street (from its intersection with Upper Water Street to South Street)
- The pedestrian mall north of Granville Street
- George Street west to Bedford Row
- Courtyard area of the Nova Scotia Art Gallery
- Carmichael Street between Lower Water Street and Bedford Row
- Sackville Street between Lower Water Street and Bedford Row
- The grassed area of the Bishops Landing courtyard

Based on the above areas and crowd counting techniques we estimate the gross crowd sizes on the Halifax waterfront as shown in **Tables 18 and 19**.

**Table 18** provides a low estimate of the gross crowd count (person visits). It reflects the lower end of estimates for undercounting.

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<b>Table 18 – Tall Ships 2007 Gross* Crowd Estimates (Low)</b>					
<b>Time<sup>12</sup></b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>	<b>Sunday</b>	<b>Monday*</b>
9 AM – 1 PM	13,394	29,186	43,679	31,885	
1 PM – 5 PM	20,690	33,184	44,079	48,977	84,001
5 PM – 9 PM	15,693	43,679	35,283	21,290	
<b>Total: 9 AM – 9 PM**</b>	<b>49,776</b>	<b>106,049</b>	<b>123,041</b>	<b>102,151</b>	<b>84,001</b>
<b>Total Five Day, 12 Hr Crowd Est.</b>					<b>465,020</b>
* Gross counts include all persons on the site, including those that were not influenced by Tall Ships 2007 to be on site.					

**Table 19** provides a high estimate of the crowd count (person visits). It reflects the higher end of estimates for undercounting.

<b>Table 19 – Tall Ships 2007 Gross* Crowd Estimates (High)</b>					
<b>Time</b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>	<b>Sunday</b>	<b>Monday*</b>
9 AM – 1 PM	14,611	40,126	47,650	34,783	
1 PM – 5 PM	22,571	31,839	48,086	53,429	89,979
5 PM – 9 PM	17,119	36,201	38,491	23,225	
<b>Total: 9 AM – 9 PM**</b>	<b>54,301</b>	<b>108,167</b>	<b>134,227</b>	<b>111,438</b>	<b>89,979</b>
<b>Total Five Day, 12 Hr Crowd Est.</b>					<b>498,110</b>
* Gross counts include all persons on the site, including those that were not influenced by Tall Ships 2007 to be on site.					

The above estimates use only counts from photo sample areas taken from Thursday to Sunday.

The nature of the crowd on Monday meant that the majority of the sites used for crowd counting were empty (people lined the shore and were more stationary – as one would expect for a parade). Therefore, the crowd size on the Halifax waterfront during the Parade of Sail was based on the:

- number of unique visitors from Thursday to Sunday inclusive;
- fraction of unique visitors from Thursday to Sunday inclusive that said they would be at the waterfront during the Parade of Sail on Monday; and
- fraction of visitors on the Halifax waterfront during the Parade of Sail that said they attended Tall Ships 2007 only on Monday during the Parade of Sail.

To put the size of the attendance numbers in some perspective, the crowd estimate of 53,429 for 1:00 PM suggests that the average space between persons was about 0.91 metres (3.0 feet), a reasonable fit. The average density for Monday's Parade of Sail was much higher because the visitors were lining the shore to view the parade versus circulating throughout the site. Because the visitors were stationary, they could maintain a higher density, just as is the case on a sidewalk during a landside parade.

<sup>12</sup> The timing of the crowd counts is correlated with when on-site photos were taken.

While there were some bottleneck areas where these densities were exceeded (such as the east-west boardwalk to the east of Summit Place and the north-south gravel pathway to the north of the Electropolis building), there were also large areas with much lower densities (such as the southern end of the site and Purdy's Wharf). The plaza area surrounding the Visitor Information Centre showed average densities, according to the photos.

The intercept survey found that the average time spent on site was approximately 3.92 hours. Therefore, based on this average we estimate the gross total daily crowd, assuming a 12-hour day beginning at 9 a.m. for each day and for the Parade of Sail on Monday as shown on **Table 18** and **Table 19**.

**By this method of calculation, the gross crowd measure for Thursday to Monday inclusive was a low of 465,020 and a high of 498,112.**

This method likely provides a modest undercount for Thursday to Sunday because it does not allow for estimates of persons viewing the ships before 9 a.m. or after 9 p.m. who were not on site between 9 a.m. and 9 p.m. Likewise, this method may undercount Monday because the figure in the tables does not include those viewing the Parade of Sail from off-site locations (e.g. buildings in downtown Halifax and Dartmouth, watercraft in the harbour, the shoreline along the harbour approaches, etc).

### **3.2.1 RECONCILIATION OF ALTERNATIVE CROWD SIZE ESTIMATES**

Crowd size estimates were prepared by the consulting team and the HRM Police, with differences between the resulting numbers for two main reasons: the estimates were produced for different purposes and, errors-of-estimate associated with sampling theory and practice.

Although we do not know the exact method the police used to calculate estimates for crowds, we expect that the following factors would account for differences:

- **Venue Area:** We used approximately 10 hectares for the venue footprint. We do not know what footprint was used by the HRM police.
- **Duration of Attendance:** We standardised our numbers for average time on site to avoid double counting, we do not know if the police standardised numbers for average stays in their footprint.
- **Flow of Visitors:** Crowd numbers differed by time of day and our estimates were based on changes in numbers over the day.
- **Hours in a 'Day':** We used a 12-hour day (9 AM to 9 PM) (ships closed for viewing at 5 PM and most concerts were underway by 9 PM). We understand that police used a 15-hour day.
- **Purpose:** Our method was based on the need to count Tall Ships attendance – the part of the 'crowd' that was on site to see and participate in the Tall Ships Festival. We anticipate that the HRM police method focussed on the need to know the crowd size for security purposes, independent of the reasons for being on-site.

### 3.2.2 SUMMARY OF “UNIQUE” VISITORS TO TALL SHIPS – ALL PORTS

<b>Table 20 – Estimated Total Attendance, Unique Visitors, All Nova Scotia<sup>13</sup></b>			
<b>Port</b>	<b>Tickets Sold</b>	<b>Estimated “Unique” Attendance (Low)</b>	<b>Estimated “Unique” Attendance (High)</b>
HRM	7,567	271,807	291,150
Louisbourg	2,104	5,000	5,000
Lunenburg	4,418	8,088	8,088
Pictou	1,850	7,000	7,000
Port Hawkesbury (estimated)	2,000	6,000	6,000
Shelburne	1,800	1,700	1,700
Sydney	6,500	30,000	30,000
Yarmouth	2,400	3,000	3,000
<b>Total</b>	<b>28,639</b>	<b>332,595</b>	<b>351,938</b>

However, the total on-site crowd estimate does not reflect the number of "unique" visitors to Tall ships 2007. The intercept survey research found that the average visitor came to the event site 1.71 times.

Therefore, the number of unique visitors to the Tall Ships 2007 at the Port of Halifax site was between 271,807 and 291,150.

With the exception of the ticket sales and estimated attendance reported for the Halifax Port, all estimates in **Table 20** are based on information supplied by the organizers of their respective Out Ports.

**Thus, total unique Nova Scotia-wide Tall Ships Attendance is estimated at between 332,595 and 351,938.**

### 3.3 GROSS AND INCREMENTAL TALL SHIPS SPENDING BY NON NOVA SCOTIANS

It is the non-NS resident spending that is of interest to stakeholders of the Tall Ships Nova Scotia Festival 2007.

The number of non-Nova Scotians who were influenced to visit Nova Scotia by the Tall Ships 2007 event in the HRM are determined by survey research that showed:

- 36.4% of the visitors to the Halifax and Dartmouth waterfronts during Tall Ships Nova Scotia Festival 2007 were non-Nova Scotians.
- 56.5% of the non-Nova Scotians who were at the Halifax or Dartmouth waterfronts were influenced, at least to some extent, by Tall Ships Nova Scotia Festival 2007 to visit Nova Scotia (motivation greater than zero).<sup>14</sup>

<sup>13</sup> Estimated total Tall Ships attendance Nova Scotia wide (525,808 to 558,900) counts multiple visits to Tall Ship made by “unique” visitors.

<sup>14</sup> The remaining 43.5% said the Tall Ships 2007 has no influence on their decision to visit Nova Scotia (i.e., they would have been at the Halifax or Dartmouth waterfronts regardless).

- The average non-Nova Scotian made 1.80 visits to the Halifax/Dartmouth Tall Ships Nova Scotia Festival 2007 site.

**Based on this information, we estimate that the number of unique non-Nova Scotian visitors at the Halifax Port visit of the Tall Ships came to Nova Scotia in some part due to Tall Ships 2007 was between 53,223 and 57,010.**

From the survey research, we also know that, of the nearly 61,000 unique individuals who visited Out Ports, an additional 10,417 were unique non-Nova Scotians visitors and one third of these individuals indicated that Tall Ships had no influence on their motivation to travel to NS. From this Out Port group, 5,307 non-Nova Scotians travelled to this province because of the Tall Ships.

**Thus, the number of unique Tall Ships motivated non-Nova Scotians that came to Nova Scotia in some part due to Tall Ships 2007 was as much as 62,317.**

Based on the foregoing per party spending estimates, motivation of Tall Ships and party size, **Table 21** provides the estimated expenditure attributed to Tall Ships Nova Scotia Festival 2007.

<b>Table 21 – Analysis of Gross Participant and “Motivation” Adjusted Non-NS Spending</b>		
<b>Population (Estimate of Unique Non-NS Visitors)</b>		<b>62,317</b>
Average Party Size for non-NS Visitors <sup>15</sup>		3.36
Est. Total Visitor Parties		15,547
Average Spending for Visitors Per Party (Q12)		\$1,996.01
Per Person Spending (Q12)	\$576.88	
Average Spending for Visitors Per Party (Q11)		\$1,617.89
Per Person Spending (Q11)	\$467.60	
<b>Gross Non-NS Spending</b>		
High		<b>\$37,019,494</b>
Low		<b>\$30,006,546</b>
<b>Motivation Adjusted (i.e. incremental) Non-Nova Scotia Spending</b>		
High		<b>\$27,977,866</b>
Low		<b>\$22,677,758</b>

However, since those non-NS who reported that the Tall Ships had zero influence were already netted out of the estimated non-NS attendance, the average trip motivation factor increases to 76%.

Comments from the Technical Review Committee highlighted the role of Tall Ships on causing those who had reported that Tall Ships had zero motivation in their decision to come to NS but had the impact of extending their stay. A subsequent review of the data

<sup>15</sup> Following a presentation of this data to a Technical Review Committee, it was recommended that very large parties not be considered for their impact on the overall data. As a result, three non-NS visitor parties with total party sizes of 15 to 32 people were deleted. This reduced the average party size from 3.46 to 3.36.

revealed that seven extra nights were caused by Tall Ships, thus adding between \$3,370.59 and \$4,158.35 in additional incremental impacts.

**Thus, the ‘motivation’ adjusted spending and Tall Ships extended spending is estimated between \$22.7 and \$28 million.**

**Table 22** provides a detailed estimate of total Tall Ships motivated expenditures by non-Nova Scotians, by type of expense, based on Question 11 and Question 12.

<b>Table 22 – Analysis of Non Nova Scotian Spending, per Party, by Expenses, n=352</b>			
<b>Spending Type</b>	<b>Per Party Spending</b>	<b>Gross Spending (18,494 Parties)</b>	<b>Tall Ships Motivated Spending</b>
Air fares (in and out of Nova Scotia)	\$388	\$7,197,630	\$5,439,684
Ferries (e.g., US/NB/PEI/NFLD)	\$48	\$890,987	\$673,373
Car rental	\$138	\$2,563,164	\$1,937,137
Taxis, Limousine Services	\$8	\$141,697	\$107,089
Fuel	\$176	\$3,268,312	\$2,470,060
Auto repairs	\$6	\$107,386	\$81,158
Fixed roof Accommodation (e.g., hotel)	\$457	\$8,469,197	\$6,400,683
Campgrounds	\$33	\$611,302	\$461,997
Meals and beverages in restaurants	\$372	\$6,898,100	\$5,213,311
Groceries/liquor	\$97	\$1,804,972	\$1,364,126
Visual arts (a)	\$11	\$203,087	\$153,485
Handicrafts (b)	\$53	\$979,084	\$739,953
<i>Art &amp; Crafts (=a +b)</i>	\$64	\$1,181,986	\$893,298
Jewellery	\$26	\$481,845	\$364,159
NS Music and NS Books	\$11	\$201,047	\$151,943
Clothing	\$63	\$1,162,512	\$878,580
Textiles (bags, fabric)	\$3	\$51,375	\$38,827
Entertainment (e.g., live performances)	\$22	\$406,731	\$307,391
Museums, art galleries, etc.	\$19	\$356,840	\$269,685
Casino, VLTs, etc.	\$25	\$463,855	\$350,563
Recreational activities (e.g., green fees)	\$19	\$357,767	\$270,386
Personal Care (hair, salons, spas, etc.)	\$5	\$93,661	\$70,785
Other item	\$12	\$215,328	\$162,736
<b>Average Total Spending (Q11)</b>	<b>\$1,621</b>	<b>\$30,061,160</b>	<b>\$22,719,034</b>
<b>Average Total Spending – Detailed (Q12)</b>	<b>\$1,991</b>	<b>\$36,926,061</b>	<b>\$27,907,254</b>

The total spending by category (**Table 22**) was provided to the Department of Finance and prepared for input-output analysis using the Nova Scotia Input Output model.<sup>16</sup>

<sup>16</sup> The data tables within the I-O model identify the portion of each spending type that is retail and wholesale margins. The margins become the measure of the amount of retail and wholesale services purchased. The model then uses information on trading patterns to measure the portion of each purchase type that is produced in Nova Scotia or imported to the province. Imports have no expansionary effect on the economy. Purchases of goods and services produced in NS have expansionary effects due to re-spending within NS.



The results of the I-O modeling are summarized in **Section 4** and more details are provided in **Appendix D**, which contains the Input-Output Analysis prepared by the Nova Scotia Department of Finance's Economics and Statistics Division.<sup>17</sup>

### 3.4 OTHER TALL SHIPS TRANSACTIONS

The above analysis is specific to the impacts associated with non-Nova Scotian visitors – the group of people who came to this province as a result of Tall Ships 2007, with their individual expenditures weighted based on the degree to which Tall Ships motivated them to come to NS (from 10% to 100%).

There are several other areas where the Tall Ships Festival generated economic activity. These include:

- **Local Residents Spending** - those who visited the waterfront and spend money on their participation at Tall Ships
- **NS Resident In-Province Traveller Spending** - "NS residents" who travelled within NS in relation to Tall Ships.

While this spending is of less interest to provincial economic development efforts that are focused more so on imported dollars spent, they are worth noting.

Local Resident spent an average of \$47 per person in their party each day in relation to their daily visits to Tall Ships.

**Thus, a total gross expenditure by local Tall Ships Attendees was in the vicinity \$4 million dollars on food, entertainment and other expenses in relation to their outing.**

**Within Nova Scotia travellers spent between \$264.41 and \$348.41 per person, for a total within province direct gross expenditure of \$5.5 to \$7.3 million.**

**Crew member and visiting ship spending** on goods and services in relation to both personal visits as well as the provisioning of the vessels would have also resulted in significant expenses that would not have accrued if the ships did not visit. Future Tall Ships evaluations should capture data that would enable an assessment of this spending.

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<sup>17</sup> For the purpose of the I-O run, airfare and ferries was reduced by 50% to reflect point-to-point travel and the assumption that 50% of the expense would have occurred at a point in Nova Scotia and 50% outside the province and car rentals were zeroed for those who had car rentals but no airfare to reflect that these non-NS most likely rented the car outside of NS and drove to the province. Other assumptions are noted in **Appendix C**.

## 4 ECONOMIC IMPACT OF NON-NOVA SCOTIAN SPENDING

The Nova Scotia Department of Finance used its Input-Output (NSIO) model to assess Tall Ships attributed spending by Non-Nova Scotian visitors using the data provided by our team (**Table 24**) and after making some assumptions about these expenses (as outlined in **Appendix D**).

Through interviews with merchants and service providers on-site (and near site) at Tall Ships 2007, we found that employers met the surges in demand due to Tall Ships visitor activity and participation in three ways:

- Their current employees worked more efficiently to serve more people per hour than they would at "normal" times of the year (60%)
- Their current employees worked longer hours than normal (40%)
- They hired additional staff on a short-term basis (few reported hiring additional staff).

Given the short-term of Tall Ships 2007, we also expect that the suppliers of goods and services to the on-site commercial participants coped with increased levels of activity in the same manner as on-site participants. While it is likely that Tall Ships 2007 did not create long-term permanent jobs, it clearly provided a short term boost to profits, hours worked and household incomes, helping to sustain as many as 475 positions through direct and spin-off impacts. The NISO model estimates that the short-term boost generated the equivalent of \$12.61 million in household income (wages and salaries, benefits, tips) which breaks down as follows:

- \$7.56 million in direct wages and salaries
- \$2.23 million in indirect wages and salaries
- \$2.82 million in induced wages and salaries

The overall contribution to Nova Scotia's GDP (at market prices) by non-Nova Scotian Tall Ships motivated spending as much as \$19.6 million through \$11.20 million in direct GDP, \$3.58 million in indirect GDP and \$4.87 million in induced GDP.

With respect to incremental NS tax revenue the Department of Finance concludes that the **"new or additional activity that can be reported with a certain degree of accuracy is that the \$27.5 million of incremental expenditures in the economy will generate direct HST and fuel tax revenue to the Province of \$2.1 million."**

The conservative estimate is based on the Department of Financers' assumptions that:

- *The incremental income earned by employees impacted by Tall Ships motivated spending over the period of Tall Ships 2007 is below the level to earn taxable income. Therefore, Tall Ships direct household income generates "zero" incremental income tax returns to the government. However, spending of the*

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*direct income will generate spending taxes. Incremental spin-off household income is not sufficient to raise employee incomes to the threshold for taxable income and hence only the extra spending by businesses creates incremental indirect tax revenue for the province.*

However, because very few new workers were employed and existing workers worked longer hours and/or served more customers their wage and tip incomes would have been increased. The increase would result in some incremental personal income tax growth for NS. Similarly, the incremental activity would likely raise business profits and hence increase NS's business income tax revenue. We could not quantitatively estimate these effects as we did not have access the annual financial data for businesses or individuals who benefited from Tall Ships 2007.

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## 5 VENDOR AND SPONSOR FEEDBACK

Feedback from site Vendors (on-site Vendors renting space specifically for the Tall Ships Events and nearby year round businesses) and event Sponsors was collected through telephone interviews and an online survey.

Questions asked related to the following:

- Reasons they became involved with Tall Ships Nova Scotia Festival 2007.
- How their involvement in Tall Ships Nova Scotia Festival 2007 was beneficial to their organization.
- Overall satisfaction with the 2007 event.
- Their level of interest in being involved with Tall Ships Nova Scotia Festival 2009
- How or if they would change any aspect of their sponsorship/involvement with the Tall Ships Festival.
- Goals they may have for their future sponsorship of the Tall Ships Festival.
- Their thoughts on how Tall Ships Festival could better leverage their investment in 2009.
- Vendor staffing for the days surrounding Tall Ships Nova Scotia Festival 2007.<sup>18</sup>
- General comments offered in relation to Tall Ships Festivals

### 5.1 APPROACH TO VENDOR/SPONSOR FEEDBACK

All ports were asked to provide our team with lists of Vendors and Sponsors to allow us to contact them directly. Response to this request was less than vigorous and participation from those for whom we obtained contact information was limited. In total, we heard from 16 Vendors and 10 Sponsors – the majority of responses related to the Halifax Port experiences.

Businesses that chose to participate reported having experienced a considerable increase in sales because of the Festival and are looking forward to the opportunity to be involved in 2009.

Contact information for Vendors involved with the Halifax Port component of Tall Ships Nova Scotia Festival 2007 was provided by WDCL. Each business was e-mailed a request to complete a brief online survey regarding their involvement with the Festival.

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<sup>18</sup> Consultation with Vendors and Sponsors was intended to widen the scope of the evaluation by describing the experiences of organizations that supported or were involved with Tall Ships. Sales data collected from these groups were not included in the economic impact analysis as, to do so, would double count the values of purchases reported by Tall Ships attendees.

This was followed by a reminder e-mail. All businesses that still had not completed a survey were phoned. By the end of the process 13 Halifax Vendors provided feedback.

Water Development Corporation Limited (and its partners) provided contact information for sponsors of the Halifax Port event. Each Sponsor was e-mailed a request to complete an online survey and this was followed by a reminder e-mail. All sponsors whom had not completed the survey after this step were contacted by phone. Ten businesses provided feedback and most of these were Gold Sponsors.

Our consultation process with both Vendors and Sponsors followed WDCL's own review of Sponsor and Vendor feedback and, because of the duplication of questions, several would be participants declined to participate in our process, deferring to the feedback they had already given directly to WDCL.

## **5.2 VENDOR/SPONSOR FEEDBACK**

The majority of respondents chose to be involved in Tall Ships Nova Scotia Festival 2007 to increase their community exposure, followed by the desire to take advantage of the marketing opportunity and the opportunity to educate.

When questioned about staffing for the event, six of the Vendors had created more work hours than normal for a similar period and five had no change in the total number of hours worked. Not everyone responded to the questions regarding gross revenue, but of those who did, had generated more than normally earned for a similar period, one had less and four had no change.

Most of the Vendors are interested in being involved with Tall Ships Festival 2009, as they were generally satisfied with their experiences. There appears to be a need to more carefully consider each Vendor's location

General feedback indicates the need to address a variety of organizational/site issues.

When asked about how they could increase their benefits from future Tall Ships Festivals, Vendors responded as follows:

- Location of trailer closer to fire department display
- By getting on the main festival grounds
- More event organization- we had issues with our tent
- Better weather
- Add telephone line for our debt machine.
- Better location
- We were mostly a display organization, and only generated enough funds to cover our costs.
- Reduced Vendor Fees
- A location with our booth facing the crowd would have been ideal and would have increased our exposure
- No rain (which we cannot control)
- Better Signs
- Make location more efficient.

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- Our main objectives for attending the Tall Ships were, exposure, education, supporting the event and tourism, and assisting the Waterfront Development Corporation. All these objectives were met to our satisfaction.
- Inclusion in advertising and promotion on advertising for the event
- Exclusivity

Open-ended comments were, for the most part, positive, with some addressing areas requiring improvement:

- “As a vendor we did not feel that we received what we paid for. Again, we had issues finding our space, got questioned on our set up, had issues with parking and were not told that we could get a vendor pass until after the fact. I had to drop off boxes and was questioned relentlessly every time I had to get through security and park for 5 minutes. Given the cost of space there should be parking provided at no or minimal cost to all vendors and staff.”
- “Have already sent comments/observations to David Jones and Patti Dow of the Tall Ships Committee.
- “Overall the Tall Ships festival was a fantastic opportunity for us to promote our [product]. However, we did experience challenges prior to the festival, especially in terms of logistics. I had difficulty contacting Tall Ships staff and had several emails that were never replied to. As well, we were looking to participate in the festivals at other ports and had a very difficult time connecting with folks at the other ports. The websites (for Sydney in particular) were out of date and had incorrect information. (The phone number posted went to a private citizen, not Tall Ships.) Overall a good experience and we would certainly be interested in participating in future events; however, we did experience some difficulty in terms of pre-event logistics.”
- “We would like to thank the organizers, especially Patti Dow, for all their help. We love being on the Waterfront during the summer and especially during Festivals and Events.”

The majority of respondents chose to be involved with the festival for the increased community exposure it provided, followed by the marketing opportunity. About 90% of them definitely want to be involved in 2009. Of those who are interested in continuing their involvement in 2009, five said they would change at least one aspect of their sponsorship and four were unsure if any change was required.

The majority of respondents were satisfied with “brand exposure”, Tall Ships “organization” and Tall Ships “communication”. “Marketing” produced an even mix of very satisfied, satisfied and neither satisfied nor dissatisfied Sponsors.

When asked, “Why did you choose to become involved with Tall Ships Nova Scotia Festival 2007?” respondents gave the following reasons:

- Promote visitor traffic to the waterfront and Cunard Centre and Seaport  
Community exposure for [our business]

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- We have partnered with the waterfront in the past and felt this was a good opportunity for [us] to be involved in. The client made a financial commitment to use [us] as a means to promote the event.
- Exposure during peak summer travel times and substantial visibility
- Traffic to the waterfront and supporting WDCL initiatives
- The Festival aligns with our corporate commitment to supporting our community especially in regards to entertainment and active lifestyle.
- Major event in the province - makes sense to partner with province's biggest beer
- Our company is local and we feel it's important to support committee events. In addition, [we] could offer Tall Ships a turnkey solution to all of their printing requirements. On another note, it was a great way to network with other local suppliers.
- I believe that the Tall Ships Festival is a great event with the opportunity to impact a lot of different ages and cultures.
- Great fit with our brand
- Financial & Promotional

Interest in continuing involvement in 2009 and comments on aspects that Sponsors would change resulted in the following:

- We would activate our sponsorship differently and work to improve communications between NSGC and our sponsor rep
- Need to maximize product sales
- We would consider taking a higher level of sponsorship.
- Larger programs before event
- We would want to be more directly involved in the planning process including all aspects of the events- entertainment, target market, etc.

Ways to help Sponsors achieve their goals for the 2009 Tall Ships Festival included:

- Value for sponsorship contribution
- Onsite communication with Tall Ships visitors
- Eager to explore new and innovative ways to reach out to attendees. Making events at Bishop's Landing more hands on for the public, more engaging.
- Same as in 2007
- Increased product sales - activation of Tall Ships marks - province wide consumer awareness - impact and influence in future opportunities
- Increase market awareness - increase networking events - be more actively involve with the volunteer aspect of the Tall Ships
- I would like to see some more partnerships in regards to activation prior to the actual event weekend.

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- Increased visibility and increased sales!
- To better utilize all of what [we] have to offer. \$7,500 of sponsorship contribution to be used for decorations was not used

Opportunities to better leverage the 2009 Sponsors' investment to help them achieve your goals included:

- Create an overall better event, more buzz. Attract more tourists to HRM. More focus on target marketing
- We are open to discussion. If the committee is going to offer something, they should do the groundwork and not rely heavily on the partner to do their work.
- If we had the same speaking opportunities, reception and logo placement, it would be great. Better leverage for us would involve a stronger link between NSGC and a specific event of the festival.
- Earlier activation of partnership (2008) activities to message the 2009 event - product sales - hospitality opportunities
- It would be great if we had more networking events with the Sponsors.
- Maybe starting a brain storming session earlier so that Sponsors can leverage other Sponsors for larger promotions.
- Sponsors should be determined well in advance and a Steering Committee formed so that everyone can work collaboratively to reach their goals. More specific contracts with clear objectives and outcomes should be determined well in advance for the benefit of all parties involved. I personally would like to see more collaboration with the NSLC and local restaurants/bars to integrate many marketing programs to build excitement around the Tall Ships. Tickets to events could be sold at NSLC outlets and given away as a part of a promotion. Evening events should not compete against each other within the same target market.
- The Entertainment coordinator left opportunities on the table to benefit her that would have saved the Tall Ships Committee money. The sponsorship team did a great job to try & rectify the problem however in a lot of cases their hands were tied. Without them, the relationship would have been disastrous.

Are there any other comments you would like to offer in relation to Tall Ships Festivals?

- As a company, we have more experience than any other organization. We have held a leadership role in every Tall Ships event held in the city. From our experience, we felt we have a contribution to make in the planning and execution of the event. In the planning of the 2007 event, we felt our advice was largely ignored. As the Festival evolved, it became clear that our suggestions, in many cases, should have been implemented and in fact were, at the last moment.
- Our dissatisfaction was with the process leading up to the events not with the outcomes we received or the festival itself.

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- I would like to see meeting begin soon with potential partners to activate the partnerships in 2008 to build momentum as we approach 2009.
- As a company, we really enjoyed our first of many years being part of this great event.
- This is an amazing opportunity and with the right partners and proper planning, it can be the "event" of the year each and every time it comes to Halifax. A Steering Committee that starts at least one year in advance and contracts with clear objectives and outcomes will greatly increase the chances of making this event a great success!
- This is a great festival & hopefully it continues to be built as Nova Scotia's "Calgary Stampede" as the potential is there. There were a lot of good ideas passed around leading up to the festival but many weren't executed.

### 5.3 RESPONSES FROM YEAR-ROUND HALIFAX BUSINESSES<sup>19</sup>

IA contact list was compiled with the help of WDCL. Phone calls were then made to interview the appropriate people.

All of the respondents reported the need for more hours to be worked during the time of the event. In most cases this meant more hours for current employees, though a couple of cases hired additional staff for that particular time. Gross revenue for each had increased during the event, in comparison to a similar frame of time, ranging from 5-400%.

Can you identify a way to increase your benefits during future Tall Ships Festivals, based on this recent experience?

- More emphasis needed on activities
- Need more advertisement in the Maritimes overall
- People were unaware of where official merchandise was located - frustrating to keep redirecting
- Happy to not have had as many competing vendors as before
- More people from the kiosks on the board to help plan
- Advertising where the businesses are located on the pamphlets put out by the festival
- Need more tents - people became lost in the shuffle
- Keep people at the waterfront/downtown core as opposed to Cunard Centre, which seemed not very well attended
- Merchants need to give more input, as they are the ones who are on the waterfront 24/7

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<sup>19</sup> Some Out Ports undertook their own interviews with businesses and this data were not made available to us by the time of this writing. In cases where Out Ports undertook their own means of evaluating the event and gathering feedback, potential interview participants may have seen our component of the overall evaluation as redundant/duplicative, which is understandable. More pre-event coordination of evaluation efforts may help in this regard in the future.

- Costumes were effective
- Kiosks - charged too much - made purchase prices too high
- Smaller tents would make it seem busier/ more popular
- More security
- Waterfront Warehouse - too empty in tent, seemed not busy/ not popular
- More emphasis needed on activities. Make it seem more like a celebration next time! Fireworks!

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## 6 METHODOLOGY LESSONS LEARNED

Through our assessment of the provincial economic impact of Tall Ships Nova Scotia Festival 2007, we were able to identify a variety of means by which future evaluations could be improved. The following list includes our recommendations.

1. **Survey Crew Members:** Our time spent in Halifax Port working with volunteer and professional surveyors highlighted the need to be more particular about who was given the responsibility for training and how much time was available for training. We were fortunate to have a responsible and committed group of volunteers, but the effectiveness of the crew would have been improved if previous surveying experience had been a pre-requisite, or if more budget had been made available for training.
2. **Survey Equipment:** Electronic hand held devices for data entry during intercept surveys would have increased efficiency. They would have also prompted surveyors to complete all required fields.
3. **Earlier Involvement:** The opportunity to meet earlier with the organizers of the Festival, including representatives from all ports, would have helped to communicate the purpose of our work to stakeholders and to establish a more effective work plan. More time for communications may also have allowed us to assist to better organize survey crews at the Out Ports
4. **Out Port participants need to:**
  - Have the survey sooner (2 to 4 weeks before the event)
  - Ensure they allocate sufficient volunteers to generate required number of surveys
  - Have a clearer understanding of the survey's purpose and priority
  - Be prepared to return the completed surveys immediately following the Tall Ships event.

Generally, we were pleased with the results from the Out Ports, however if further analysis of regional or port-by-port experiences are of interest, individual ports will need to set and adhere to sample targets.

5. **Survey Purpose:** Intercept surveys require the interviewee to interrupt his/her own time for the purpose of the survey. To keep the interruption as short as practical the time to complete a survey should be kept under 10 minutes.. A 10 minute survey must be sharply focused to provide useful results and there is a limit to how much can be expected from a 10 minute survey.

The Tall Ships Nova Scotia Festival 2007 survey was focussed on economic impacts created by non-Nova Scotians. If future evaluations wish to cover other topic areas then either the purpose of the survey needs to be changed or additional data collection instruments beyond intercept surveys will need to be used.

6. **Integration of Evaluation Processes:** To obtain input from festival participants (e.g., Vendors and Sponsors) it was necessary to communicate with them through surveys or interviews. During the process, however, we learned similar questions had already been asked of them by event organizers. As a result, respondents had a

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tendency to view our requests as unnecessary or redundant. This negatively affected our response rate. Had our evaluation been integrated with that of event organizers, both parties would have received more efficient and effective feedback.

7. **Contact Information:** Confirmation of the Vendor contact information early in the process would support a more efficient follow-up effort and ensure quality communications with target organizations.

## APPENDIX A – SURVEY METHODOLOGY

### STEP 1 - SURVEY DESIGN: AN ITERATIVE PROCESS

The design of the visitor intercept, vendor and sponsor surveys was informed by a review of surveys used to assess the 2000 and 2004 Tall Ships Festivals. The March 2007 “Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Ungated or Open Access Events and Festivals” and related documentation was also used to support the process by providing options to address incremental impacts (new economic activity) and options for defining the population from which a survey sample is taken.

The advantage of intercept surveys is that a respondent's reactions (facial response and body language) can be gauged and reacted to by the surveyor who may be able to respond with clarification of what was asked or otherwise support the survey process.

Based on input from the Evaluation Committee that had been struck to advise in this evaluation, it was determined that the most desirable form for the Visitor Intercept Survey would be one that was succinct and minimized survey burden on interviewees. Because of this direction, general satisfaction questions and marketing related questions (which were in the 2000 survey) were limited or eliminated. Instead, the 2007 Visitor Intercept survey (**Appendix B**) was comprised mainly of questions related to economic impacts, the origin of attendees, spending, indicators of incremental impacts and to support the crowd counting methodology (discussed in **Section 3**). Other features of the survey design included:

- **Administrative Data** – the survey taker's name, date and time of the survey.
- **Screening Questions** - used to determine if survey participants had already been surveyed and the individual's relationship to a travel party, etc.
- **Participant's Origin** - e.g., local port/HRM, other Nova Scotia, other Atlantic Canada, other Canada, US and International.
- **Spending** - structured so that it was suitable for use with the Nova Scotia Department of Finance's I-O Model – meaning, expenditure categories were selected so that they matched I-O input requirements. The structure of Nova Scotia Tourism, Culture, and Heritages' Visitor Exit Survey's (VES) spending question was also referenced so commodity level spending information could be combined to match the VES categories.
- **Follow-up Data** – contact information for follow-up surveys, if an additional consultation step is deemed desirable or necessary.

### STEP 2: SURVEY FORMAT

Because of time constraints and the need to provide a common survey format that could be easily followed, we used hard-copy (printed) surveys. Survey Crew members were instructed to fill out the three-page survey based on visitor responses in the presence of the survey participants. The manual survey format also supported the wider distribution

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of the survey tool to the participating Out Ports so that volunteers in these other ports could replicate the process.

### **STEP 3: PRE-TEST SURVEY**

Team member and Committee feedback was used to fine-tune the survey prior to pre-testing. Throughout the process, the study team and Evaluation Committee were resolute that proper structure of the survey was critical to obtaining reliable and usable data. Pre-tests, wording checks, confirmation of answer sets, and assessments for clarity and respondent interpretation of all questions resulted in the Port of Halifax survey (provided in **Appendix B**).

### **STEP 4: VOLUNTEER COORDINATION**

Prior to the Tall Ships event in Halifax, our team was provided with a list of volunteers who had agreed to support the evaluation process. Several of these individuals had prior experience in conducting similar surveys.

Organization of the volunteer Survey Crew took place within the week prior to the Halifax Tall Ships Event and consisted of a series of introductory e-mails and a proposed schedule for survey takers throughout the 5 days of the Halifax Tall Ships event. This communication was augmented with phone calls to individual volunteers to confirm their availability.

- Given the critical importance of data collection we engaged five paid survey crew members because: The 'availability' indicated by the volunteers at the time of their application and registration as volunteers with Tall Ships, Did not necessarily mean a willingness to work all of those available times, and/or
- Had changed significantly by the time the Tall Ships Event was on us, and
- of concerns over the volunteers' survey experience and ability to work in English (in some cases)

Three of the five paid crewmembers were made responsible for data collection and two were asked to manage the survey process.

The management duties included:

- Monitoring the return rates
- Issuing blank surveys
- Collecting completed surveys (and reviewing the completeness of returned surveys)
- Coordinating the schedules for paid and volunteer survey crew members
- Clarifying methodology related questions
- Conducting surveys when needed
- Taking scheduled photographs of the sample crowd count areas

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Ensuring survey crewmembers were looked after (refreshments, rain gear, and schedules for breaks).

#### **STEP 5: VOLUNTEER ORIENTATION AND TRAINING SESSION**

Prior to the training session, the Survey Crew received a draft copy of the survey via e-mail and was asked to review the survey. The e-mail also included the proposed survey schedule, a map of the Tall Ships venue, strategies for random sampling of survey participants and the expected surveying locations.

A training session, designed to familiarize the Survey Crew with the survey format and the approach for survey delivery, was held for paid and volunteer surveyors. Individuals were provided an overview of the purpose of the survey, the importance of a random selection of visitors and strategies to accomplish the goals of the surveying process. The session took place at the Tall Ships Project Office.

Members of the Survey Crew were instructed on how to:

- Ensure the sample is random
- Approach individuals
- Solicit their participation in the survey process
- Deliver questions in a comfortable fashion, ensuring higher response.

Part of the training included role-playing with the crewmembers taking on the roles of interviewer and interviewee. Role-playing provided another opportunity to test the survey instrument and resulted in some minor modifications to the survey.

The importance of the intercept survey was explained. The survey was to function as a personal interview, completed in the presence of the respondent.

Interviewers were stationed at specific sites along the waterfront in high traffic areas but where the Survey Crew would not contribute to congestion.

The sites were located where Survey Crew members had access to supporting services such as event information sites and within view of ships. These locations were where the participants at the Tall Ships had “received a service” so that they have had some recent and substantive connection to the experience of the Tall Ships prior to their participation in the survey.

The Crew was instructed:

- To ask every third person walking past a pre-selected marker if they would participate in the interview. This strategy helped to ensure that members of the Survey Crew were not unintentionally introducing selection biases by choosing people who appear more approachable (to them) than others. However, Survey Crewmembers were asked NOT to turn away interested individuals who approached them.

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- On how to provide clarification of what was asked or otherwise support the survey process
- Not to comment on the responses provided. (If there was an opportunity to offer some helpful information not related to the survey, this help was to be offered after the survey was completed.)

#### **STEP 6: DEPLOYMENT OF SURVEY (HALIFAX PORT)**

Volunteer and paid Survey Crew members met at the Volunteer Tent prior to the start of each shift. Surveys were handed out and instructions given to either emphasize “must do’s” or answer questions from the Crew. Crewmembers were then dispatched to specific interview locations.

Initially we assigned individuals to pre-selected areas, but were quick to learn which areas were unfavourable, in particular areas where people wished to stay in motion. Crewmembers and supervisors would discuss and agree on the location of their survey sites before re-deploying. In general, areas outside of flowing pedestrian traffic were most effective and the least disruptive of the visitors.

The Survey Crew returned to the Volunteer Tent at the end of each shift to hand in completed surveys, ask questions and voice any concerns they might have. On balance, the volunteers who stayed with this process did an excellent job, demonstrating care and concern about completing the survey correctly. Crew supervisors would also share their experiences and insights from one shift to the next.

#### **STEP 7: ON SITE SURVEY MANAGEMENT (HALIFAX PORT)**

A Crew Supervisor was assigned to each shift. The supervisor distributed the surveys (typically a quota was 20 completed surveys per crew member per shift) and noted where each surveyor was to be stationed.

During each shift, the supervisor would walk along the waterfront to ensure everything was running smoothly, provide an opportunity for crewmembers to ask questions, or offer suggestions to the Survey Crew. The supervisor would also survey visitors to help with the rate of completed surveys and to look for and assess changes in the crowd or the manner in which they were responding to the survey process. The most common issue among the surveyors was initial hesitation around approaching individuals for the survey – the fact that the supervisors were actively surveying lent credibility to suggestions and strategies they offered to those who may have had initial difficulties.

#### **STEP 8: SAMPLE OBJECTIVES & SCHEDULING**

Based on a review of previous Tall Ships assessments and the requirement for stratification and statistical significance, we targeted a minimum of 500 to 600 completed surveys in the Halifax Port and 384 in Out Ports. This would provide the number of cases necessary to support stratification by visitor origin and afford the opportunity to assess sub-sets of the sample (e.g. Halifax Port vs. Out Ports).

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We anticipated that about 800 surveys could be completed in Halifax considering that about 160 surveys could be completed per day because:

- The estimated time to complete and start the next survey was 15 minutes
- At least 200 hours of surveying time were scheduled.

Our schedule for the Survey Crew is provided in **Figure 27** below.

	12-Jul Avail Thurs	13-Jul Avail Fri	14-Jul Avail Sat	15-Jul Avail Sun	16-Jul Avail Mon	
<b>Morning Shift</b>						
10:30 AM to 12:30 PM 2 Hour Shift	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Legend for Availability DAY TIME ANYTIME EVENING N/A
Number of Surveyors	8	10	8	10	8	
Hours Shift	16	30	24	30	24	124 Shift total hours
<b>Afternoon Shift</b>						
1:30 PM to 4:00 PM 2.5 Hour Shift	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	
Number of Surveyors	8	10	12	10	8	
Hours Shift	20	25	30	25	20	120 Shift total hours
<b>Evening Shift</b>						
5:00PM to 7:00PM 2 Hour Shift	Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer	Volunteer Volunteer Volunteer Volunteer Volunteer Volunteer		
Number of Surveyors	4	5	7	7	0	
Hours Shift	8	10	14	14	0	46 Shift total hours
						<b>290 TOTAL HOURS</b>

**Figure 27 – Halifax Port Survey Crew Planned Shift Schedule**

For most days, Surveyors were on site for three 2-hour shifts – morning, mid afternoon, and early evening. As reflected in **Figure 27**, our working schedule allowed for 290

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hours of supervision and on-site survey time. After adjustments for schedule conflicts, volunteer attrition and fatigue, the actual number of hours logged on-site was 154.5 hours. Notwithstanding, we completed 911 surveys at the Halifax site because the supervisors were able to conduct a significant number of surveys and the time to complete a survey was under 15 minutes.

#### **STEP 9: OUT PORT INTERCEPT SURVEY PROCESS**

Ports outside of Halifax saw ships from July 18<sup>th</sup> to 24<sup>th</sup>. Data collection in these areas was supported by briefings provided to volunteer coordinators (e-mails and phone contact), which highlighted the approach used in Halifax. Coordinators were provided with the intercept surveys and instructions on how they should be administered by volunteers.

Given the importance of having a consistent survey for all ports, the survey used in the Port of Halifax was adjusted as little as possible. However, there were unique aspects with the Out Ports, such as gating and ticket pricing, which had to be taken into consideration. The core line of questioning remained the same as in Halifax.

Once finalized, the surveys and our contact information were e-mailed to the Out Ports. Out Port survey organizers were also asked to print at least 60 copies and were provided with a detailed list of “helpful hints” based on basic intercept surveying techniques and lessons learned in Halifax. We also offered to make members of our paid Survey Crew available to help with training and initial start-up if desired. The offer was made to Lunenburg, Shelburne, Port Hawkesbury, Louisbourg and Sydney.

Shelburne, Port Hawkesbury and Sydney each expressed interest in having on-site support with this process. We placed paid crew in those ports.

At the conclusion of the Out Port field work it became clear that there may have been a misunderstanding of our offer of paid support and the intended role of the paid support in these ports – effectively reducing the number of completed surveys. More lead-time would have alleviated this misunderstanding and increased the number of surveys returned from the Out Ports.

At the conclusion of the Tall Ships Nova Scotia Festival 2007 Out Port events, we were able to report that all ports took part in the intercept survey. However, stronger efforts by at least two Out Ports would have been preferred.

#### **STEP 10: DATA ENTRY, DATA CLEANING & ANALYSIS**

Hard-copy surveys were collected at Halifax Port at the end of each day of surveying, numbered and entered in an on-line data entry template by a team of data entry clerks. Surveys from Out Ports were mailed or couriered to the data entry team.

The survey data were processed and analyzed using Statistical Package for the Social Sciences (SPSS) and MS-Excel.

Data processing included cleaning of data by reviewing the data for statistical outliers and consistent terminology and spelling (for open ended responses where participants were free to respond in their own words).

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The data were analysed using a variety of methods including: descriptives, frequencies and tabulations, cross tabulations, statistical significance tests and histograms (**Section 2**).

### **STEP 11: SURVEYING PORT OF HALIFAX SPONSORS & VENDORS**

To gather economic data and general feedback from the Halifax Sponsors and Vendors, a survey was developed and forwarded to organizers for approval, before distributing it via a web based tool, using the list of emails provided to us.

The Port of Halifax recipients were asked to complete the brief list of questions within the week of the event, and those who had not taken the opportunity, received a follow-up phone call, encouraging them to contribute to the evaluation process.

We interviewed suppliers, organizers and sponsors of the event to identify benefits they received and the nature of economic impacts associated with their involvement. The consultation process addressed the following questions:

- What is the nature of the your [firm's/organization's] involvement with Tall Ships Nova Scotia Festival 2007?
- What benefits did you anticipate [for your firm/organization] from involvement in Tall Ships Nova Scotia Festival 2007?
- Did you hire additional staff in relation to your involvement in Tall Ships Nova Scotia Festival 2007? If "Yes", how many positions and what were they (e.g. part-time, full-time, seasonal, etc.)?
- Did you add additional hours to existing staff in relation to your involvement in Tall Ships Nova Scotia Festival 2007?
- Do you have any additional comments on your involvement with Tall Ships Nova Scotia Festival 2007?

Information gained from this process provided context to the experiences of Tall Ships and an opportunity to more thoroughly assess the employment impacts (i.e., whether employers typically hired new staff or added shifts/hours for existing staff).

Local, year-round businesses in the Out Port festival sites were contacted by phone for a brief interview concerning their experiences with Tall Ships Nova Scotia Festival 2007. At the time of this process, Out Ports (except Yarmouth, Lunenburg and Louisbourg) had not supplied contact information of local businesses for this purpose.

### **STEP 12: TECHNICAL REVIEW**

The analysis of Non-NS visitor spending and interpretation of survey data was presented to a Technical Review Committee. Comments were collected and incorporated into the analysis.

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## **APPENDIX B - PORT OF HALIFAX SURVEY**

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## Tall Ships 2007 - Economic Impact Assessment

### Tall Ships 2007 / Economic Impact Assessment / Visitor Intercept Survey

<b>Survey Number</b> [Office Use]:	<b>Name of Interviewer:</b> _____	<b>Day of Interview:</b> <b>July</b> _____ <b>Time of Interview:</b> <b>HH:MM</b> _____
---------------------------------------	--------------------------------------	--

Hello, my name is [YOUR FIRST NAME]. I am doing a survey on behalf of **Tall Ships 2007** to learn a bit about our visitors, their expenditures while in Nova Scotia, and their enjoyment of the event. Do you mind answering some questions? [Estimated time: 5 minutes].

[If “No”, or “Already surveyed” say] **Thanks, enjoy your visit to the Tall Ships!**

### SECTION A: ALL RESPONDENTS

1.	How much time do you expect to spend on the Waterfront <b>TODAY</b> in relation to the Tall Ships?	Estimated hours spent at Tall Ships today: _____ <i>(specify in HH:MM)</i>				
2.	Did you visit or do you plan to visit the Tall Ships on the following days?	<b>Are you going...</b>	<b>“No”</b>	<b>“Not Sure”</b>	<b>“Yes”</b>	<b># of trips to the Waterfront</b>
		Thursday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	# _____
		Friday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	# _____
		Saturday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	# _____
		Sunday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	# _____
		Monday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	# _____
3.	For the Tall Ships event, did you purchase or do you expect to purchase the following:	<input type="radio"/> Tall Ships Multi-Day Boarding Passes Yes, # purchased _____ <input type="radio"/> Tall Ships Single Day Boarding Passes Yes, # purchased _____ <input type="radio"/> Tall Ships Evening Event & Concert Tickets Yes, # purchased _____ <input type="radio"/> Tall Ships Tickets for Daily Entertainment Yes, # purchased _____				
	Please give a reason why you <u>did</u> or <u>did not</u> purchase Tall Ships tickets.	(specify)				
4.	Did you come to the Tall Ships alone or with other people?	<input type="radio"/> Alone <input type="radio"/> With other people - <b>specify total # in group:</b> _____ (Describe this group below) <input type="radio"/> Immediate family (spouse and/or children) <input type="radio"/> Other relatives (parents, nieces/nephews, etc.) <input type="radio"/> Friends <input type="radio"/> Tour group <input type="radio"/> Other (specify) _____				
5.	Where is your usual place of residence?	<input type="radio"/> <b>HRM</b> ...[GO TO SECTION B, Q6] <input type="radio"/> If <b>Non HRM</b> (Select place of residence) <input type="radio"/> In Nova Scotia but outside HRM <input type="radio"/> Other Atlantic Province (PEI, NFLD, NB) <input type="radio"/> Other Canadian Province <input type="radio"/> The United States <input type="radio"/> Countries other than Canada or USA (specify) _____ ...[NON HRM - GO TO SECTION C, Q8]				

## Tall Ships 2007 - Economic Impact Assessment

### SECTION B: HRM RESIDENTS ONLY

6.	How much do you estimate you will <b>spend today</b> in relation to your visit to Tall Ships?	Spending on Tall Ships <b>Today (\$ CDN):</b> _____
7.	Did you come to <b>the waterfront today specifically</b> to attend the Tall Ships event?  <b>[ALL HRM - GO TO SECTION D, Q15]</b>	<input type="radio"/> Yes <input type="radio"/> If No... (Check main reason below) <input type="radio"/> Work/business meetings in the area <input type="radio"/> Shopping <input type="radio"/> Restaurant visit/meal <input type="radio"/> General sightseeing <input type="radio"/> Other (specify): _____

### SECTION C: THOSE THAT DO NOT LIVE IN HRM

8.	<b>How important was the Tall Ships in your decision to travel in Nova Scotia?</b> 0 indicates "no influence" and 10 indicates that "Tall Ships is the reason for your travel in Nova Scotia".	<b>[CIRCLE #]</b> <table style="margin-left: auto; margin-right: auto;"> <tr> <td>No Influence</td> <td colspan="10"></td> <td>The Reason</td> <td>Don't Know</td> </tr> <tr> <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;">6</td> <td style="text-align: center;">7</td> <td style="text-align: center;">8</td> <td style="text-align: center;">9</td> <td style="text-align: center;">10</td> <td style="text-align: center;">X</td> </tr> </table>	No Influence											The Reason	Don't Know	0	1	2	3	4	5	6	7	8	9	10	X
No Influence											The Reason	Don't Know															
0	1	2	3	4	5	6	7	8	9	10	X																
9.	How many nights of your current trip will you spend in Nova Scotia away from your home?	Total number of <b>Nights:</b> _____																									
	How many of these nights in NS are because of the Tall Ships event?	Total number of <b>Tall Ships Nights:</b> _____																									
10.	Did you extend your travel in Nova Scotia because of Tall Ships event?	<input type="radio"/> Yes - <b>specify # of nights:</b> _____ <input type="radio"/> No																									
11.	In total, <b>how much do you estimate you will spend in Nova Scotia during this trip [IN CANADIAN CURRENCY]?</b>	Total Spending in <b>NS</b> _____																									
12.	During your travel in Nova Scotia on this trip, how much have you spent or will you spend in Nova Scotia in the following categories? <b>[CANADIAN DOLLARS]</b>																										
	Air fares (in and out of Nova Scotia)	\$ _____																									
	Ferries (e.g., US/NB/PEI/NFLD)	\$ _____																									
	Car rental	\$ _____																									
	Taxis, Limousine Services	\$ _____																									
	Fuel	\$ _____																									
	Auto repairs	\$ _____																									
	Fixed roof Accommodation (e.g., hotel)	\$ _____																									
	Campgrounds	\$ _____																									
	Meals and beverages in restaurants (Food/drink)	\$ _____																									
	Groceries/liquor	\$ _____																									
	Visual arts	\$ _____																									
	Handicrafts	\$ _____																									
	Jewellery	\$ _____																									
	NS Music or NS Books	\$ _____																									
	Clothing	\$ _____																									
	Textiles (bags, fabric)	\$ _____																									
	Entertainment (e.g., live performances)	\$ _____																									
	Museums, art galleries, etc.	\$ _____																									
	Casino, VLTs, etc.	\$ _____																									
	Recreational activities (e.g., green fees)	\$ _____																									
	Personal Care (hair, salons, spas, etc.)	\$ _____																									
	Other item	\$ _____																									

## *Tall Ships 2007 - Economic Impact Assessment*

### **SECTION D: ALL RESPONDENTS**

13.	Overall, how satisfied are you with the Tall Ships event?	<input type="radio"/> Not Satisfied <input type="radio"/> Satisfied <input type="radio"/> Very Satisfied										
14.	Are you planning to visit any other ports in Nova Scotia to see the Tall Ships?	<table style="width: 100%; border: none;"> <tr> <td style="width: 65%; border: none;"><input type="radio"/> Louisbourg</td> <td style="width: 35%; border: none;"><input type="radio"/> Sydney</td> </tr> <tr> <td style="border: none;"><input type="radio"/> Lunenburg</td> <td style="border: none;"><input type="radio"/> Yarmouth</td> </tr> <tr> <td style="border: none;"><input type="radio"/> Pictou</td> <td style="border: none;"></td> </tr> <tr> <td style="border: none;"><input type="radio"/> Port Hawkesbury</td> <td style="border: none;"><input type="radio"/> <b>No, None of the above</b></td> </tr> <tr> <td style="border: none;"><input type="radio"/> Shelburne</td> <td style="border: none;"><input type="radio"/> <b>Not Sure</b></td> </tr> </table>	<input type="radio"/> Louisbourg	<input type="radio"/> Sydney	<input type="radio"/> Lunenburg	<input type="radio"/> Yarmouth	<input type="radio"/> Pictou		<input type="radio"/> Port Hawkesbury	<input type="radio"/> <b>No, None of the above</b>	<input type="radio"/> Shelburne	<input type="radio"/> <b>Not Sure</b>
<input type="radio"/> Louisbourg	<input type="radio"/> Sydney											
<input type="radio"/> Lunenburg	<input type="radio"/> Yarmouth											
<input type="radio"/> Pictou												
<input type="radio"/> Port Hawkesbury	<input type="radio"/> <b>No, None of the above</b>											
<input type="radio"/> Shelburne	<input type="radio"/> <b>Not Sure</b>											
15.	Can you name three sponsors supporting Tall Ships 2007?	1 _____ 2 _____ 3 _____										
16.	In general, having noticed their sponsorship, are you more likely to buy their products?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Sure/Don't know										
17.	Would you be willing to participate in a follow-up survey? (All respondents will be entered in a draw for Tall Ships souvenirs – e.g., Jackets and T-Shirts). <div style="text-align: right; margin-top: 10px;"> <input type="radio"/> YES      <input type="radio"/> NO         </div>											
18.	<b>[IF YES]</b> Name: _____  e-mail: _____  Phone: _____  Do you prefer to be contacted by: E-mail _____ or phone _____? <b>[CHECK]</b>	<b>[CHECK PREFERRED CALL TIME]</b>  <input type="radio"/> Weekday AM <input type="radio"/> Weekday PM  <input type="radio"/> Weekend AM <input type="radio"/> Weekend PM										
19.	<b>[RECORD GENDER WITHOUT ASKING]</b>	<input type="radio"/> Male <input type="radio"/> Female										
20.	Do you have any additional comments on this Tall Ships event? _____ _____ _____ _____ _____ _____											

**Thank you very much for your help and patience!**

## APPENDIX C - STATISTICAL APPENDIX

<b>Table 23 – Summary of Nights Stayed, by Visitor Origin and Survey Set n=40</b>				
<b>Origin</b>	<b>Data</b>	<b>Halifax Port</b>	<b>Out-Ports</b>	<b>All NS</b>
In Nova Scotia but outside LOCAL AREA	Tall Ships Nights	84	107	191
	Nova Scotia Nights	64	28	92
	Nights Extended because of Tall Ships	1	5	6
Other Atlantic Province (PEI, NFLD, NB)	Tall Ships Nights	166	30	196
	Nova Scotia Nights	72	14	86
	Nights Extended because of Tall Ships	15	1	16
Other Canadian Province	Tall Ships Nights	1070	259	1329
	Nova Scotia Nights	326	51	377
	Nights Extended because of Tall Ships	30	14	44
The United States	Tall Ships Nights	387	94	481
	Nova Scotia Nights	86	7	93
	Nights Extended because of Tall Ships	18		18
International	Tall Ships Nights	156	38	194
	Nova Scotia Nights	26	3	29
	Nights Extended because of Tall Ships	3	1	4
Unknown Origin	Tall Ships Nights	54	17	71
	Nova Scotia Nights	11	3	14
	Nights Extended because of Tall Ships	8		8
<b>Tall Ships Nights</b>		<b>1917</b>	<b>545</b>	<b>2462</b>
<b>Nova Scotia Nights</b>		<b>585</b>	<b>106</b>	<b>691</b>
<b>Nights Extended because of Tall Ships</b>		<b>75</b>	<b>21</b>	<b>96</b>

<b>Table 24 – Total Trip Expenditure – Summary of all Categories, by Residence</b>				
<b>Place of Residence</b>	<b>Data</b>	<b>Survey Set</b>		
		<b>Halifax Port</b>	<b>Out-Ports</b>	<b>All NS</b>
In Nova Scotia but outside LOCAL AREA	Count	96.00	15.00	111.00
	<b>Average Total Spending</b>	<b>\$320.46</b>	<b>\$527.27</b>	<b>\$348.41</b>
Other Atlantic Province (PEI, NFLD, NB)	Count	60.00	8.00	68.00
	<b>Average Total Spending</b>	<b>\$774.97</b>	<b>\$534.50</b>	<b>\$746.68</b>
Other Canadian Province	Count	160.00	25.00	185.00
	<b>Average Total Spending</b>	<b>\$2,313.40</b>	<b>\$2,553.98</b>	<b>\$2,345.91</b>

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The United States	Count	66.00	9.00	75.00
	<b>Average Total Spending</b>	<b>\$2,048.83</b>	<b>\$1,282.78</b>	<b>\$1,956.91</b>
International	Count	21.00	3.00	24.00
	<b>Average Total Spending</b>	<b>\$2,900.48</b>	<b>\$2,791.67</b>	<b>\$2,886.88</b>
<b>Count</b>		<b>403.00</b>	<b>60.00</b>	<b>463.00</b>
<b>Average Total Spending</b>		<b>\$1,596.87</b>	<b>\$1,599.24</b>	<b>\$1,597.18</b>

<b>Table 25 – Tall Ships Motivation to Travel in NS, by Ports and Visitor Origin</b>				
<b>Origin</b>	<b>Importance</b>	<b>Halifax Port</b>	<b>Out Ports</b>	<b>All NS</b>
In Nova Scotia but outside LOCAL AREA	0 - Not Important	7.69%	8.11%	7.80%
	1	0.00%	2.70%	0.71%
	2	0.00%	10.81%	2.84%
	3	0.96%	5.41%	2.13%
	4	0.00%	0.00%	0.00%
	5	3.85%	8.11%	4.96%
	6	3.85%	5.41%	4.26%
	7	0.96%	2.70%	1.42%
	8	5.77%	8.11%	6.38%
	9	6.73%	8.11%	7.09%
	10 - The Reason We are Here	70.19%	40.54%	62.41%
Other Atlantic Province (PEI, NFLD, NB)	0 - Not Important	25.81%	11.11%	23.94%
	1	1.61%	11.11%	2.82%
	2	1.61%	0.00%	1.41%
	3	0.00%	0.00%	0.00%
	4	0.00%	0.00%	0.00%
	5	1.61%	11.11%	2.82%
	6	1.61%	11.11%	2.82%
	7	4.84%	11.11%	5.63%
	8	9.68%	22.22%	11.27%
	9	6.45%	11.11%	7.04%
	10 - The Reason We are Here	46.77%	11.11%	42.25%
Other Canadian Province	0 - Not Important	38.32%	42.11%	39.02%
	1	4.79%	0.00%	3.90%
	2	2.99%	2.63%	2.93%
	3	2.99%	7.89%	3.90%
	4	2.40%	2.63%	2.44%
	5	4.79%	15.79%	6.83%
	6	2.99%	5.26%	3.41%
	7	1.20%	5.26%	1.95%
	8	7.19%	5.26%	6.83%
	9	1.80%	2.63%	1.95%
	10 - The Reason We are Here	30.54%	10.53%	26.83%
The United States	0 - Not Important	65.22%	76.92%	67.07%
	1	0.00%	0.00%	0.00%
	2	0.00%	0.00%	0.00%
	3	2.90%	0.00%	2.44%

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	4	0.00%	0.00%	0.00%
	5	1.45%	0.00%	1.22%
	6	10.14%	7.69%	9.76%
	7	1.45%	0.00%	1.22%
	8	8.70%	0.00%	7.32%
	9	1.45%	0.00%	1.22%
	10 - The Reason We are Here	8.70%	15.38%	9.76%
International	0 - Not Important	52.38%	83.33%	59.26%
	1	0.00%	0.00%	0.00%
	2	4.76%	0.00%	3.70%
	3	4.76%	0.00%	3.70%
	4	4.76%	0.00%	3.70%
	5	4.76%	0.00%	3.70%
	6	4.76%	0.00%	3.70%
	7	4.76%	16.67%	7.41%
	8	4.76%	0.00%	3.70%
	9	0.00%	0.00%	0.00%
	10 - The Reason We are Here	14.29%	0.00%	11.11%

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## **APPENDIX D – ECONOMIC IMPACT**

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**ECONOMIC IMPACT  
OF  
TALL SHIPS 2007  
ON  
NOVA SCOTIA**

**prepared  
for  
T.M. McGuire Ltd.**

**by  
Economics and Statistics Division  
Nova Scotia Department of Finance  
November 2007**

**Introduction**

T. M. McGuire Ltd. (McGuire), the consultant on contract to study the economic impact of the Tall Ships 2007 event in Nova Scotia, has asked the Economics and Statistics Division of the Department of Finance to perform an economic impact assessment on incremental visitor expenditures related to Tall Ships 2007.

The event was held July 12 - 25, 2007 and included all Nova Scotian locations visited by the Tall Ships. However, the main spectacle was at the Halifax waterfront. This analysis contains all Nova Scotia locations visited by the Tall Ships. The expenditures related to visitors are subjected to analysis in order to obtain an estimate of the economic impact of these expenditures on the Nova Scotia economy in terms of employment, household income and taxation revenue generated for the provincial government.

### **Cautionary Note on the Economic Impact Analysis of Tall Ships 2007**

#### *1. The "constant returns to scale" methodology of the Nova Scotia IO Model*

The IO Model uses a "constant returns to scale" methodology to measure economic impacts. This in effect says that for every dollar of expenditure there will be created X employment and \$Y of household income from which tax revenue is generated to the province. But the "constant returns to scale" methodology inherent in the IO Model is a serious drawback for the purposes of this report which is particularly evident in attempting to measure expenditures in the Retail Trade industry. An example will highlight this deficiency.

Ratios underlying the IO Model assume that a certain level of expenditure generates a certain level of employment. For a hypothetical example, assume every \$1,000 of expenditure is related to a person-day of employment in retail. However, it is possible for a retail clerk to have a busier day or sell more relatively higher priced goods and generate \$2,000 in sales but still only work a person-day. But, the IO Model will indicate that 2 person-days are worked and the facts are that much of the "extra" employment generated is accommodated by current employees being busier or working more hours, rather than having more hires for a relatively short time period. The reality is that visitors expenditures will sustain employment in the retail and other sectors and will create short-term duration part-time jobs mostly down on the Halifax Waterfront.

It is not realistic to report that 475 direct jobs (see Table 2) will be created on a person-year basis because of the estimated \$27.5 million of incremental expenditures from Tall Ships 2007 from approximately two weeks of activity in the economy. Extreme caution is advised when reporting the economic impacts related to citing increased employment and household income as well as tax revenue (which is generated according to a tax template based on a PY of employment and on a PY of annual wage and salary).

It is best to relate the level of incremental expenditures circulating in the economy for the duration of visitors' stay in the Province and that some additional part-time employment will be

created during this time period but with most of the impact "sustaining" jobs in the economy.

The cautionary caveat of "constant returns to scale" is particularly noteworthy in this study since there are large proportions of expenditures in Retail, Traveller Accommodations and in Food Services and Drinking Places (48.5% of total expenditures ) that create economic impacts.

In summary, this cautionary note indicates that the numbers stated in Table 2 regarding direct and spinoff employment, household income and provincial tax revenues are overstated and more likely represent the maintenance and sustainability of results reported. The only new or additional activity that can be reported with a certain degree of accuracy is that the \$27.5 million of incremental expenditures in the economy will generate direct HST and fuel tax revenue to the Province of \$2.1 million.

### **Methodology and Data**

McGuire has supplied information on incremental Tall Ships motivated spending by visitors to Nova Scotia to see the event.

**Table 1: Incremental Spending in Nova Scotia by Non Nova Scotian Visitors for the Tall Ships Event - by Spending Type**

Spending Type	Tall Ships Motivated Spending by Non Nova Scotians (\$ millions)
Transportation	10.3
Accommodations	6.9
Meals and Beverages	6.6
Arts, Crafts and Souvenirs	1.4
Clothing	0.9
Entertainment	1.2
Other	0.2
Total	27.5

The above spending was further broken down by McGuire to conform to Nova Scotia Input Output (IO) Model industry sector formatting.

The NSIO Model is used for economic impact analysis of visitor expenditures that have been transformed into input-output industry and commodity sectors. Economic impacts are divided

into three components: direct; spinoff; and total impacts. Direct impacts are those that result directly from the individual's expenditures on, or purchases of, goods and services in Nova Scotia. Spinoff impacts are the sum of indirect impacts (due to inter-industry transactions) and induced impacts (from the repercussive effects caused by household spending and re-spending). Total impacts are the sum of direct and spinoff impacts.

Taxes paid to the government of Nova Scotia will come from three sources: from the direct sales tax paid by visitors on their purchases of goods and services in Nova Scotia; from gasoline taxes on motor fuel purchases; and from personal income and spending taxes on the labour income earned by employees of the businesses being impacted by visitor expenditures.

On the direct sales tax paid by visitors, the provincial portion of the HST is 8 per cent and there is no refund paid on visitor expenditures. However, ferries are exempt and air transportation is assumed to be "zero" under the assumption that the tickets are purchased outside Nova Scotia.

Provincial gasoline taxes are 15.5 cents/litre. This rate is applied to \$2,470,060 of visitor gasoline purchases at an average price/litre of \$1.11 which was the average price in Zone 1 (HRM) over the period June 29 to July 27, 2007. The estimated provincial gasoline tax is \$345,000.

The direct impact on provincial government revenue, comprised of personal income and sales taxes, is estimated from wages and salaries, net of benefits and from a personal income and consumption tax template developed by the Department of Finance. Spinoff provincial government revenues are also estimated from spinoff wages and salaries using the tax pro forma developed by the Department of Finance. The provincial personal income tax rate is based on a single wage earner with three dependants (one partner, two children). Tax revenue impacts do not include provision for provincial taxes paid on corporate profits. The business produces a taxable supply and thus will not pay HST on business inputs.

However, there remains an inherent difficulty with determining the personal income and spending tax returns to the Provincial Government because of the Tall Ships event. Given that the event occurs over a two week period, one assumes that employees associated with the event would not be earning enough wages over this time period to hit the threshold for taxable income.

Therefore, Tall Ships direct household income generates "zero" income tax returns to the government. However, the person spends that household income and will generate spending taxes for the provincial government. In this case, the analysis assumes that the Department of Finance's tax template is only applicable to direct household income's spending tax rate.

The tax problem continues with the "Spinoffs" that are calculated with the use of the IO Model. An assumption is made that the spinoff tax rate applies to only Model 1 (indirect or inter-industry) spinoffs of the IO Model. Model 1 strips out all spending and re-spending of household income and calculates only inter-industry spinoffs. This in effect, eliminates all household income taxes and concentrates only on taxes earned on inter-industry transactions. This eliminates over estimation and provides a minimum estimate of "Spinoff" Provincial

Government Revenue.

## **Economic Impact Assumptions**

The following assumptions are used in the determination of the economic impact of incremental visitor expenditures for Tall Ships 2007 on Nova Scotia.

### General Assumptions:

- Visitor expenditures, originating from outside Nova Scotia, are incremental activity in the Nova Scotia economy. McGuire conducted a survey of selected visitors at the event and tabulated from survey results the expenditures that are incremental activity due to the Tall Ships Event.
- All values are reported in constant 2007 dollar terms. No provision is made for inflationary factors.
- Direct labour is derived by the IO Model from expenditure data inputted into IO industry and commodity sectors.
- Direct and Spinoff labour is reported in the IO Model on a person-year (PY) basis. Staff at Finance and McGuire believe that a two week event does not create employment measured on a PY basis. However, the use of the IO Model for analysis dictates that measurement of expenditure impact activity is on PY terms. NOTE: see the ***Cautionary Note on the Economic Impact Analysis of Tall Ships 2007***
- Labour fringe benefit rates are Nova Scotia average rates as taken from *Statistics Canada, Estimates of Labour Income, Cat. No. 13F0016-XPB*.
- Retail and Wholesale Trade industry margins for Nova Scotia are sourced from Industry Canada: <http://strategis.ic.gc.ca>.

### Assumptions used to format expenditure data into IO industry and commodity sectors:

- Expenditures of \$5.4 million for airfare (in and out of Nova Scotia) were allocated 50/50 between Imports and the "Air Transportation" industry sector of the IO Model.
- Expenditures of \$0.7 million for ferries were allocated 50/50 between Imports and the "Water Transportation" industry sector of the IO Model.
- Expenditures of \$1.5 million for car rental were placed in the "Automotive Rental and Leasing" industry sector of the IO Model.
- Expenditures of \$107,089 related to taxis, limousine service placed in the "Taxi and Limousine Service" industry sector of the IO Model.
- Expenditures \$2.5 million for fuel were placed in the "Motor Gasoline" commodity sector of the IO Model.
- Expenditures of \$81,158 related to auto repairs were placed in the "Automotive Repair and Maintenance" industry sector of the IO Model.
- Expenditures of \$6.4 million related to fixed roof accommodation were placed in the "Traveller Accommodation" industry sector of the IO Model.
- Expenditures of \$461,997 related to campgrounds were placed in the "RV Parks, Recreational Camps, and Rooming and Board Houses" industry sector of the IO Model.



- Expenditures of \$5.2 million related to meals and beverages in restaurants were placed in the "Food Services and Drinking Places" industry sector of the IO Model.
- Allocation of expenditures of \$1.4 million related to "Groceries, Liquor" follow the following methodology:
  - A retail margin (20% supermarket and other groceries stores) was placed in the Retail Trade sector of the IO Model.
  - A wholesale margin (22.8%) was placed in the Wholesale Trade industry sector of the IO Model.
  - The remainder was allocated 68.6% Imports, 10.4% Bread and Bakery products (Bread and Bakery Products industry of the IO Model), 10.4% Seafood (Seafood Products industry sector of the IO Model) and 10.4% dairy products (Dairy Products industry sector of the IO Model).
- Expenditures of \$153,485 related to visual arts were given a retail margin of 60.3% (placed in the Retail Trade industry sector of the IO Model) and the remainder (39.7%) was placed in the "Households" sector of the IO Model.
- Expenditures of \$739,953 related to handicrafts were given a retail margin of 45.4% (placed in the Retail Trade industry sector of the IO Model) and the remainder (54.6%) was placed in the "Households" industry sector of the IO Model.
- Expenditures of \$364,159 related to Jewellery were given a retail margin of 51.2% (placed in the Retail Trade industry sector of the IO Model) and the remainder (48.8%) was placed in the "Jewelry and Silverware Manufacturing" industry sector of the IO Model.
- Expenditures of \$151,943 related to NS music and NS books were allocated 50/50 between music and books. The music portion was given a retail margin of 47.7% with the remainder (52.3%) placed in the "Sound Recording Industries" industry sector of the IO Model. The book portion was given a retail margin of 36.4 % with the remainder (63.6%) placed in the "Newspaper, Periodical, Book, and Database Publishers" industry sector of the IO Model.
- Expenditures of \$878,580 related to "Clothing purchases" have a retail margin of 40.1%, from family clothing stores, and were placed in the Retail Trade industry sector of the IO Model. The remainder (59.9%) was considered to be Imports.
- Expenditures of \$38,827 related to textiles (bags and fabrics) were split 50/50 between textile, bags and canvass mills and fabric mills. The textiles (bags and fabrics) portion were given a retail margin of 31% and the remainder (69%) placed in the "Textile Bag and Canvass Mills" industry sector of the IO Model. The fabric mills portion was given a retail trade margin of 31% and the remainder (69%) placed in the "Fabric Mills" industry sector of the IO Model.
- Expenditures of \$307,391 related to entertainment were placed in the "Performing Arts, Spectator Sports and Related Industries " industry sector of the IO Model.
- Expenditures of \$269,685 related to museums, art galleries were placed in the "Heritage Institutions " industry sector of the IO Model.
- Expenditures of \$350,563 related to casinos, VLT's were placed in the "Gambling Industries " industry sector of the IO Model.

- Expenditures of \$270,386 related to recreational activities were placed in the "Amusement and Recreation Industries " sector of the IO Model.
- Expenditures of \$70,785 related to personal care were placed in the "Personal Care Services and Other Personal Services " industry sector of the IO Model.
- Expenditures of \$162,736 related to "Other" were placed in the Personal Care industry sector of the IO Model.

### Economic Impact

The economic impact of Tall Ships 2007 incremental visitor expenditures (from both Canada and non-residents of Canada) of \$27.5 million on the Nova Scotia economy are presented in Table 2.

**Table 2: Economic Impact of Tall Ships 2007 Incremental Visitor Expenditures of \$27.5 million on the Nova Scotia Economy**

	Direct	Spinoff	Total
Employment (PYs)	475	Induced 74 Indirect <u>56</u> Total 130	605
Household Income (\$'000):	7,560	Induced 2,820 Indirect <u>2,230</u> Total 5,050	12,610
Provincial Gov't Revenue (\$'000):			
Direct HST	1,712	-----	1,712
Gas Tax	345	-----	345
Income and Spending Tax	<u>524*</u>	<u>254**</u>	<u>778</u>
Total Revenue	2,581	254**	2,835

Notes:

\* Spending tax only.

\*\* The spinoff provincial income and spending tax attributable to indirect household income.

The results reported in Table 2 are considered sustained activity in the Nova Scotia economy and are not to be confused with total additional or new activity in the province. The only new or additional activity that can be reported with a certain degree of accuracy is that the \$27.5 million of incremental visitor expenditures in the economy will generate direct HST and gas tax to the province of \$2.1 million.

As discussed, the direct employment is model-generated and is overstated because of the

interaction of “constant returns to scale” and the level of expenditures in the Retail, Traveller Accommodations and Food Services and Drinking Places industries. Spinoff employment has been reported as indirect (inter-industry) and induced (effects of household spending and re-spending). Indirect employment would be the minimal spinoff employment.

These considerations reinforce the caution in using IO Model generated numbers to measure the impacts of a “short time period” event such as Tall Ships.

