



Tourism Benchmark Study for Inverness and Victoria Counties

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November 2002

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Executive Summary

The ultimate goal of this study was to provide a benchmark for the tourism industry in Inverness and Victoria Counties from existing data sources. The benchmark will provide a snapshot of the industry and when included with internal, county specific data provide such valuable information as:

- Tourism Revenue
- Number of visitors
- Economic Impact
- Visitor Origin

In addition to providing the aforementioned information, this study sought to create a methodology that would allow the benchmark to be replicated on an annual basis by municipal staff of each respective county.

In addition, recommendations will be made where efforts should be expended to acquire better information or data to meet these objectives. Including:

- Options available from Statistics Canada
- Options available from Dept of Transportation regarding traffic counts
- Forms for festival & events operators to collect information for statistical purposes.

In the pages that follow, the detailed tourism benchmark information is presented for each county followed by explanation of calculations and rationalization for the chosen methodology.

The benchmark information for each county is classified into three broad categories, namely: 1) Tourism Indicators, 2) Estimated Visitors and 3) Tourism Revenue Estimates.

The Tourism Indicators are essentially statistics that are available from a variety of sources that provide an indication or snapshot of the tourism season. Tourism indicators include: Nova Scotia visitor traffic, room sales and occupancy rates for fixed roof and campground accommodations, visitor origin data and municipal tax base information. The last item, municipal tax base information will prove valuable in future years once trend information becomes more readily available.

The Estimated Visitors section provides an estimate of visitors to the respective counties using two distinct methodologies. The first method is that adopted by Cape Breton Island, where the Statistics Canada visitor benchmark is adjusted annually based on trends and changes evident through the tourism indicators. The second method is an estimate of visitors based on Nova Scotia Department of Transportation traffic counts from various points in each county.

This section also provides an estimate for traffic and visitation on the Cabot Trail and data for ferries in Victoria County.

The Tourism Revenue Estimates uses information in the two previously identified categories to arrive at an estimate for Tourism Revenues within each county.

Each line item is explained in detail later in this report along with an annual checklist to ensure that all relevant data has been acquired from year to year.

The festivals and event impact calculation sheet is also included in this report as a tool for festival organizers to use to calculate the financial impact of their event on their local community. If used consistently by festival operators, it can become a strong information source about festivals and events within the counties.

Inverness County Benchmark

Inverness County				
Tourism Indicators	2002	2001	2000	1999
NS Visitor Traffic	1,771,000	2,046,000	2,175,000	2,202,000
Change from previous year	-13.4%	-5.9%	-1.2%	
Change from 1999	-19.6%			
Total Rooms Sold	95,480	109,514	118,862	123,469
Change from previous year	-12.8%	-7.9%	-3.7%	
Occupancy Rate (%)	49.8	45.9	48.6	53
Change from previous year	8.5%	-5.6%	-8.3%	
Total Available Room Nights	189,104	239,408	244,354	233,236
Change from previous year	-21.0%	-2.0%	4.8%	
Total Available Rooms	6,210	7,845	8,008	7,642
Change from previous year	-20.8%	-2.0%	4.8%	
Person Visits to CB Highlands NP	374,203	366,617	361,809	433,975
Change from previous year	2.1%	1.3%	-16.6%	
Visitors to CBHNP	0	202,289	252,567	273,786
Change from previous year	-100.0%	-19.9%	-7.8%	
Campsites Sold at CBHNP	27,710	27,269	27,636	33,049
Change from previous year	1.6%	-1.3%	-16.4%	
Visitor Origin - CBHighlands NP				
Cape Breton Island		8.7%	8.1%	9.0%
Nova Scotia - Mainland		9.0%	6.9%	8.0%
Other Atlantic Provinces		3.7%	3.2%	3.6%
Ontario		18.1%	19.8%	19.5%
Quebec		10.6%	9.2%	9.0%
Western Provinces & Territories		6.9%	7.7%	7.4%
North Eastern United States		16.4%	16.9%	16.2%
Remaining USA		17.7%	17.9%	17.9%
European & other		6.7%	7.0%	6.8%
Unknown/Not Recorded		2.2%	3.4%	2.8%
		100.0%	100.1%	100.2%
Average of "Change from previous year"	-8.1%	-4.2%	-7.2%	
Tax Assessment Data				
Tourism Assessments		\$21,354,600.00	38.6%	
Non-Tourism related Assessments		\$34,010,500.00	61.4%	
All Commercial Assessments		\$55,365,100.00	100.0%	
Number of Building Permits Issued		100		
Value of Building Permits Issued		\$10,000,000.00		
Number of Tourism Related Permits		21	21.0%	
Value of Tourism Related Permits		\$2,900,500.00	29.0%	

Estimated Visitors				
	2002	2001	2000	1999
Based on Stats Can 1999 benchmark	250,646	272,625	284,446	306,500
Visitor Traffic Counts (# of visitor vehicles)				
Canso Causeway	596,143			633,942
Port Hastings	518,774			518,774
Route 19 - Troy	159,874			244,917
Route 19 - Broad Cove	59,802			119,455
Cabot Trail - St. Joseph Du Moine	132,177			288,449
Cabot Trail - North	137,860			312,545
Cabot Trail - Margaree	138,627			100,050
Average Visitor Vehicles	249,037			316,876
Change from 1999	-21.4%			
Average Party Size	2.2			2.2
Number of Visitors	547,881			697,127
Number of Parties	249,037			316,876
Estimated Visitors Around Cabot Trail				
Cabot Trail - St. Joseph Du Moine	132,177			288,449
Cabot Trail - Skir Dhu	167,351			167,351
Cabot Trail - North	137,860			312,545
Cabot Trail - Margaree/Middle River	138,627			100,050
Average Visitor Vehicles	144,004			217,099
Change from 1999	-33.7%			
Average Party Size	2.2			2.2
Number of Visitors	316,809			477,617
Number of Parties	144,004			217,099
Tourism Revenue Estimates				
Average Expenditure per visitor	\$145.00			
Average Expenditure per party	\$319.00			
Estimated Total Tourism Revenues (A)	\$79,442,723.25			
Estimated Total Tourism Revenues (B)	\$36,343,656.51			
Average Total Estimated Tourism Rev.	\$57,893,189.88			
Est. multiplier/impact on local income	\$17,153,752.16			

Victoria County Benchmark

Victoria County				
Tourism Indicators	2002	2001	2000	1999
NS Visitor Traffic	1,771,000	2,046,000	2,175,000	2,202,000
Change from previous year	-13.4%	-5.9%	-1.2%	
Change from 1999	-19.6%			
Total Rooms Sold	108,150	115,733	117,369	118,181
Change from previous year	-6.6%	-1.4%	-0.7%	
Occupancy Rate (%)	58.1	51.7	53.9	59.6
Change from previous year	12.4%	-4.1%	-9.6%	
Total Available Room Nights	186,186	223,895	218,138	198,195
Change from previous year	-16.8%	2.6%	10.1%	
Total Available Rooms	6,106	7,326	7,145	6,485
Change from previous year	-16.7%	2.5%	10.2%	
Person Visits to CB Highlands NP	374,203	366,617	361,809	433,975
Change from previous year	2.1%	1.3%	-16.6%	
Visitors to CBHNP	0	202,289	252,567	273,786
Change from previous year	-100.0%	-19.9%	-7.8%	
Campsites Sold at CBHNP	27,710	27,269	27,636	33,049
Change from previous year	1.6%	-1.3%	-16.4%	
Private/Municipal Campsites Sold	38,818	32,935	34,445	35,443
Change from previous year	17.9%	-4.4%	-2.8%	
Campsite Occupancy Rate (%)	40.2%	37.9%	39.9%	42.3%
Change from previous year	6.1%	-5.2%	-5.6%	
Total Available Campsite Nights	96,607	86,937	86,229	83,759
Change from previous year	11.1%	0.8%	2.9%	
Total Available Sites	3,157	2,843	2,819	2,738
Change from previous year	11.1%	0.8%	3.0%	
Visitor Origin - CBHighlands NP				
Cape Breton Island		8.7%	8.1%	9.0%
Nova Scotia - Mainland		9.0%	6.9%	8.0%
Other Atlantic Provinces		3.7%	3.2%	3.6%
Ontario		18.1%	19.8%	19.5%
Quebec		10.6%	9.2%	9.0%
Western Provinces & Territories		6.9%	7.7%	7.4%
North Eastern United States		16.4%	16.9%	16.2%
Remaining USA		17.7%	17.9%	17.9%
European & other		6.7%	7.0%	6.8%
Unknown/Not Recorded		2.2%	3.4%	2.8%
		100.0%	100.1%	100.2%
Average of "Change from previous year"	0.0%	-2.6%	-5.3%	

Tax Assessment Data				
Tourism Assessments		\$34,052,900.00	59.2%	
Non-Tourism related Assessments		\$23,442,000.00	40.8%	
All Commercial Assessments		\$57,494,900.00	100.0%	
Number of Building Permits Issued		100		
Value of Building Permits Issued		\$10,000,000.00		
Number of Tourism Related Permits		21	21.0%	
Value of Tourism Related Permits		\$2,900,500.00	29.0%	
Estimated Visitors				
	2002	2001	2000	1999
Based on Stats Can 1999 benchmark	210,838	210,871	216,489	228,700
Visitor Traffic Counts (# of visitor vehicles)				
Hwy 105 - Bucklaw (at Cty Line)	361,533			559,088
Hwy 105 - Inlet Baddeck (Exits 7 & 8)	491,313			796,899
Hwy 105 - South Haven	714,197			714,197
Hwy 105 - Ross Ferry (at Cty Line)	480,780			245,770
Hwy 223 - Estemere/Grand Narrows	50,537			50,537
Cabot Trail - Skir Dhu	167,351			167,351
Cabot Trail - North	137,860			312,545
Cabot Trail - Margaree/Middle River	138,627			100,050
Average Visitor Vehicles	317,775			368,305
Change from 1999	-13.7%			
Average Party Size	2.2			2.2
Number of Visitors	699,104			810,270
Number of Parties	317,775			368,305
Ferry Traffic				
Englishtown - Visitors (paying 1.75/3.00)	51,913	75,156	74,452	109,730
Little Narrows - Visitors (paying 1.75/3.00)	17,902	31,321	33,066	50,097
Estimated Visitors Around Cabot Trail				
Cabot Trail - St. Joseph Du Moine	132,177			288,449
Cabot Trail - Skir Dhu	167,351			167,351
Cabot Trail - North	137,860			312,545
Cabot Trail - Margaree/Middle River	138,627			100,050
Average Visitor Vehicles	144,004			217,099
Change from 1999	-33.7%			
Average Party Size	2.2			2.2
Number of Visitors	316,809			477,617
Number of Parties	144,004			217,099
Tourism Revenue Estimates				
Average Expenditure per visitor	\$145.00			
Average Expenditure per party	\$319.00			
Estimated Total Tourism Revenues (A)	\$101,370,124.55			
Estimated Total Tourism Revenues (B)	\$30,571,562.45			
Average Total Estimated Tourism Rev.	\$65,970,843.50			
Est. multiplier/impact on local income	\$19,540,563.84			

Fixed Roof Occupancy Worksheet

Inverness County

Month	Days	2002				2001				2000				1999			
		Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms
Jan	31	24.1%	2,469	10,245	330	27.1%	2,574	9,498	306	31.6%	3,070	9,715	313	31.4%	2,870	9,140	295
Feb	28	29.1%	2,638	9,065	324	32.3%	2,765	8,560	306	37.5%	3,433	9,155	327	38.4%	3,174	8,266	295
Mar	31	35.4%	3,644	10,294	332	31.6%	3,043	9,630	311	40.6%	4,191	10,323	333	38.3%	3,499	9,136	295
Apr	30	31.4%	3,635	11,576	386	33.8%	3,645	10,784	359	33.2%	3,717	11,196	373	29.8%	3,270	10,973	366
May	31	25.4%	5,155	20,295	655	23.7%	4,996	21,080	680	31.7%	6,274	19,792	638	34.4%	6,576	19,116	617
Jun	30	37.3%	11,504	30,842	1,028	34.4%	10,656	30,977	1,033	37.0%	11,463	30,981	1,033	40.5%	12,150	30,000	1,000
Jul	31	74.2%	24,427	32,920	1,062	72.1%	23,874	33,112	1,068	75.1%	25,496	33,949	1,095	79.9%	26,114	32,683	1,054
Aug	31	76.8%	25,228	32,849	1,060	71.9%	24,013	33,398	1,077	72.0%	24,479	33,999	1,097	78.8%	25,867	32,826	1,059
Sep	30	54.1%	16,780	31,017	1,034	49.2%	15,404	31,309	1,044	55.8%	18,191	32,600	1,087	59.1%	18,321	31,000	1,033
Oct	31	0.0%	0	No Data	No Data	42.5%	11,482	27,016	871	40.3%	11,828	29,350	947	48.7%	13,476	27,671	893
Nov	30	0.0%	0	No Data	No Data	36.7%	4,652	12,676	423	33.7%	4,356	12,926	431	40.0%	4,722	11,805	394
Dec	31	0.0%	0	No Data	No Data	21.2%	2,410	11,368	367	22.8%	2,364	10,368	334	32.3%	3,430	10,619	343
Total	365	49.8%	95,480	189,104	6,210	45.9%	109,514	239,408	7,845	48.6%	118,862	244,354	8,008	53.0%	123,469	233,236	7,642

Victoria County

Month	Days	2002				2001				2000				1999			
		Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms	Occupancy Rate	Rooms Sold	Available Room Nights	Total Available Rooms
Jan	31	15.5%	864	5,574	180	8.5%	387	4,553	147	8.7%	370	4,253	137	7.5%	281	3,747	121
Feb	28	14.2%	823	5,796	207	11.6%	676	5,828	208	12.4%	770	6,210	222	10.3%	463	4,495	161
Mar	31	12.8%	801	6,258	202	14.2%	985	6,937	224	14.3%	979	6,846	221	12.6%	526	4,175	135
Apr	30	13.9%	954	6,863	229	11.4%	789	6,921	231	11.5%	949	8,252	275	9.6%	417	4,344	145
May	31	23.6%	4,842	20,517	662	24.1%	4,648	19,286	622	25.4%	5,552	21,858	705	22.7%	4,480	19,736	637
Jun	30	44.9%	14,814	32,993	1,100	44.7%	14,335	32,069	1,069	48.2%	14,917	30,948	1,032	53.0%	15,795	29,802	993
Jul	31	79.4%	28,989	36,510	1,178	80.5%	28,277	35,127	1,133	82.9%	28,053	33,840	1,092	87.0%	28,337	32,571	1,051
Aug	31	86.3%	31,923	36,991	1,193	86.2%	29,923	34,713	1,120	84.1%	28,542	33,938	1,095	89.2%	29,270	32,814	1,059
Sep	30	69.6%	24,140	34,684	1,156	63.6%	20,889	32,844	1,095	72.1%	23,397	32,451	1,082	74.7%	23,514	31,478	1,049
Oct	31	0.0%	0	No Data	No Data	50.1%	13,571	27,088	874	48.3%	12,557	25,998	839	55.2%	14,070	25,489	822
Nov	30	0.0%	0	No Data	No Data	12.3%	740	6,016	201	10.1%	891	8,822	294	12.4%	599	4,831	161
Dec	31	0.0%	0	No Data	No Data	4.1%	513	12,512	404	8.3%	392	4,723	152	9.1%	429	4,714	152
Total	365	58.1%	108,150	186,186	6,106	51.7%	115,733	223,895	7,326	53.9%	117,369	218,138	7,145	59.6%	118,181	198,195	6,485

Campsite Occupancy Worksheet

Victoria County

Month	Days	2002				2001				2000				1999			
		Occupancy Rate	Sites Sold	Available Site Nights	Total Available Sites	Occupancy Rate	Sites Sold	Available Site Nights	Total Available Sites	Occupancy Rate	Sites Sold	Available Site Nights	Total Available Sites	Occupancy Rate	Sites Sold	Available Site Nights	Total Available Sites
Jan	31	0.0%	864	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
Feb	28	0.0%	823	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
Mar	31	0.0%	801	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
Apr	30	0.0%	954	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
May	31	10.0%	1,834	18,340	592	16.0%	1,065	6,656	215	22.0%	1,454	6,609	213	21.0%	1,389	6,614	213
Jun	30	24.0%	4,597	19,154	638	24.0%	4,337	18,071	602	22.0%	4,151	18,868	629	27.0%	4,797	17,767	592
Jul	31	56.0%	11,401	20,359	657	59.0%	11,401	19,324	623	62.0%	11,946	19,268	622	66.0%	12,578	19,058	615
Aug	31	59.0%	11,653	19,751	637	54.0%	10,304	19,081	616	54.0%	10,438	19,330	624	55.0%	10,695	19,445	627
Sep	30	31.0%	5,891	19,003	633	29.0%	5,069	17,479	583	34.0%	5,499	16,174	539	33.0%	5,230	15,848	528
Oct	31	0.0%	0	No Data	No Data	12.0%	759	6,325	204	16.0%	957	5,981	193	15.0%	754	5,027	162
Nov	30	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
Dec	31	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data	0.0%	0	No Data	No Data
Total	365	40.2%	38,818	96,607	3,157	37.9%	32,935	86,937	2,843	39.9%	34,445	86,229	2,819	42.3%	35,443	83,759	2,738

Discussion and Rationale

Tourism Indicators

- NS Visitor Traffic:** This is the visitor traffic as reported by Nova Scotia Tourism in their *Tourism Insights* publication. This figure represents visitor traffic from all modes of travel. It is intended to provide an overview of what has occurred globally in tourism. Change from previous year is simply the percentage increase or decrease from the previously reported result.
- Total Rooms Sold:** This is the total number of fixed roof accommodation rooms sold within the respective county as reported by Nova Scotia Tourism. Details may be found on the Fixed Roof Accommodations Worksheet.
- Occupancy Rate:** This rate is that reported for fixed roof accommodations within the respective county as reported by Nova Scotia Tourism. Details may be found on the Fixed Roof Accommodations Worksheet.
- Total Available Room Nights:** This is a calculated field. On a monthly basis this figure represents the total available rooms nights for sale in each respective county. The calculation is rooms sold divided by occupancy rate. Total available room nights is the sum of all monthly totals from the Fixed Roof Accommodation Worksheet.
- Total Available Rooms:** This is a calculated field that provides the number of rooms or units available. It is calculated by dividing Total Available Room Nights by the number of days in each respective month. Total available rooms is the sum of all monthly totals from the Fixed Roof Accommodation Worksheet.
- Person Visits to CB Highlands National Park:** This is a statistic drawn from CBHNP annual stakeholder report and reflects visitors and their length of stay at the CBHNP.
- Visitors to CBHNP:** This is the actual number of visitors to the CBHNP. This statistic is provided by CBHNP.
- Campsites sold at CBHNP:** This reflects the number of person nights camped at CBHNP and is provided by them.
- Private/ Municipal Campsites Sold:** This is the total number of campsites sold within the respective county by privately or municipally owned campgrounds as reported by Nova Scotia Tourism. Data is only released when more than 6 operators are within a county. Details may be found on the Campsite Accommodations Worksheet.

Campsite Occupancy Rate: Same as Occupancy Rate above only for private/ municipal campsites. Reported by Nova Scotia Tourism.

Total Available Campsite Nights: See Total Available Room Nights above.

Total Available Sites: See Total Available Rooms above.

Visitor Origin - CBHNP: Visitor Origin statistics as collected and reported by CBHNP in their Annual Stakeholder Report. While not exhaustive it is a very good indicator of where visitors to the two counties are originating.

Average "Change from Previous Year": A calculated field that takes a selected average of the "Change from previous year" fields. This average was modeled after the Cape Breton Island Benchmark that was established by Gardner Pinfold in their March 2001 study "A Study for Estimating Cape Breton Island Tourist Visitation". To remain consistent with the Cape Breton Island Benchmark the measure includes the average change for NS Visitor Traffic, Total Rooms Sold and Person Visits to CBHNP. For Victoria County the change in municipal campsites sold is also included. This field is used later in deriving one of the two visitation estimates.

Estimated Visitors

Visitors based on Statistics

Canada 1999 Benchmark: Using the actual number reported by Statistics Canada in 1999 as a base, this number is adjusted annually based on the “Average Change from Previous Year” to provide the first visitation estimate.

Visitor Traffic Count: The Nova Scotia Department of Highways continually does traffic counts on Nova Scotia’s roadways. In certain locations they have permanent counters installed, others are counted on a rotating basis every three years. Department of Highways provides two estimates when it does counts: ADT or Average Daily Traffic and AADT or Annual Average Daily Traffic. ADT is the real result of the traffic count that is conducted by the department. Each road in the province is given a grade (ranging from AA to G) as to consistency or lack of seasonal variation to traffic. For example the Bedford Highway has very little seasonal variation so it would be graded AA while parts of the Cabot Trail are highly seasonal and are graded F. Since the majority of counts are only conducted for a short duration, they apply a formula based on the seasonal variation of traffic to determine the AADT. To arrive at an estimate of local traffic one divides the AADT by the ADT. Assuming the all other traffic is non-local, or visitor traffic we can estimate the amount of visitor vehicles that travel a given road in a typical year by taking the visiting traffic (100% minus local traffic %) and multiplying it by AADT and the number of days in a year. See the Traffic Worksheet for detailed calculations.

Average Visitor Vehicles: Examining all routes and traffic levels within each county led to the selection of a key entry/ exit routes in each county. Visitor traffic for each route is calculated and averaged to determine the Average Visitor Vehicles.

Average Party Size: As reported in the most recent Nova Scotia Visitor Exit Study, across all vehicles. This is a necessary statistic to extrapolate the number of visitors that would traveling in the visitor vehicles.

Number of Visitors: A calculated field, determined by multiplying the Average Visitor Vehicles and Average Party Size.

Number of Parties: The number of visiting parties is equal to the number of visitor vehicles.

Estimated Visitors Around Cabot Trail: Appropriate routes around the Cabot Trail are examined to derive an estimated number of visitors to the Trail. The methodology is the same as for calculating Average Visitor Vehicles.

Tourism Revenue Estimates

Average Expenditure per visitor: This figure is combined from Statistics Canada Canadian Travel Survey and International Travel Surveys for 1999. The figure represents expenditures across the entire Island to ensure that it will be possible to update in future editions of the benchmark.

Average Expenditure per party: This field is calculated by multiplying Average Expenditure per visitor with Average Party Size.

Estimated Total Tourism Revenues (A): This first revenue estimated is based on Traffic Count data. The specific calculation is Average Expenditure Per Party multiplied by Number of Parties. This estimate will likely overstate tourism revenue on a consistent basis.

Estimated Total Tourism Revenue (B): This second revenue estimate is based on the Stats Canada annually adjusted benchmark. The specific calculation is the Average Expenditure Per Visitor multiplied by Visitors Based on Stats Can 1999 benchmark. This is the same revenue estimate that is reported by Statistics Canada. This estimate will likely understate tourism revenue on a consistent basis.

Average Total Estimated Tourism Revenue: The average of both revenue estimates to provide a realistic estimate of tourism revenue in each respective county.

Estimated multiplier/ Impact on local income: Canmac Economics Ltd. constructed a tourism impact multiplier for both Inverness and Victoria Counties. In Inverness, every \$1 spent on tourism, the local economy generates total household income of \$0.2963. In Victoria County, for every \$1 spent, the local economy generates total household income of \$0.2962. Nova Scotia Tourism prepares annual Economic Impact Stats and reports on Taxes (\$), Employment (jobs), and Payroll (\$). This multiplier would be comparable with the Province's Total Payroll estimate.

Annual Check List

To update this information on an annual basis will require sourcing material from a variety of organizations and people. This section outlines where the information comes from and when it is available.

Tourism Indicators

NS Visitor Traffic: This is the visitor traffic as reported by Nova Scotia Tourism in their *Tourism Insights* publication. It is available at the year end, online at the Nova Scotia Tourism website (www.gov.ns.ca/dtc/pubs/insights). Questions may be addressed to Karen McNutt, tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Total Rooms Sold: Information at a county level is only available by special request to Karen McNutt, NS Tourism & Culture, Tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Occupancy Rate: Information at a county level is only available by special request to Karen McNutt, NS Tourism & Culture, Tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Total Available Room Nights: This is a calculated field.

Total Available Rooms: This is a calculated field.

Person Visits to CB Highlands National Park: This is a statistic drawn from CBHNP annual stakeholder report. At year end, it may be obtained from Heather Dixon at CBHNP, Ingonish Beach, NS Tel: 902-285-2273.

Visitors to CBHNP: This is the actual number of visitors to the CBHNP. This statistic is provided by CBHNP. At year end, it may be obtained from Heather Dixon at CBHNP, Ingonish Beach, NS Tel: 902-285-2273.

Campsites sold at CBHNP: This is a statistic drawn from CBHNP annual stakeholder report. At year end, it may be obtained from Heather Dixon at CBHNP, Ingonish Beach, NS Tel: 902-285-2273.

Private/ Municipal Campsites Sold: Information at a county level is only available by special request to Karen McNutt, NS Tourism & Culture, Tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Campsite Occupancy Rate: Information at a county level is only available by special request to Karen McNutt, NS Tourism & Culture, Tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Total Available Campsite Nights: Calculated

Total Available Sites: Calculated.

Visitor Origin - CBHNP: This is a statistic drawn from CBHNP annual stakeholder report. At year end, it may be obtained from Heather Dixon at CBHNP, Ingonish Beach, NS Tel: 902-285-2273.

Average "Change from Previous Year": Calculated field.

Estimated Visitors

Visitors based on Statistics

Canada 1999 Benchmark: Calculated field.

Visitor Traffic Count: Traffic count data is available from The Nova Scotia Department of Transportation. Mr. Lester Hanley is Supervisor of Traffic Analysis, located at Purdy's Wharf in Halifax. Tel: 902-424-7909 Fax: 902-424-0571 E-mail: hanleyle@gov.ns.ca. They are able to place temporary counters on any road in Nova Scotia to provide traffic counts on an annual basis. The cost is \$200 per road. For an additional \$50 they can provide breakdown by vehicle type. It is recommended that all of those areas not served by permanent counters be formulated into an annual counting program. Cost for such a program would be \$800 for Victoria County and \$600 for Inverness County.

Average Visitor Vehicles: Calculated field

Ferry Traffic Data: Available from Linda Sleep, Department of Transportation, Financial Branch, Halifax. Tel: 902-424-4259 Fax: 902-425-3994.

Average Party Size: As reported in the most recent Nova Scotia Visitor Exit Study, across all vehicles. Contact Karen McNutt, at Nova Scotia Tourism & Culture, Tel: 902-424-6355, e-mail: mcnuttk@gov.ns.ca.

Number of Visitors: Calculated field.

Number of Parties: Calculated field

Estimated Visitors Around Cabot Trail: Extrapolated from Traffic Data.

Tourism Revenue Estimates

Average Expenditure per visitor: This figure is combined from Statistics Canada Canadian Travel Survey and International Travel Surveys for 1999. The figure represents expenditures across the entire Island to ensure that it will be possible to update in future editions of the benchmark. Update information available from Marc Melanson, Account Executive, Statistics Canada,

Halifax Regional Office, Tel: 902-426-6278, Fax: 902-426-9538 e-mail: marc.melanson@statcan.ca

Average Expenditure per party: Calculated Field

Estimated Total Tourism Revenues (A): Calculated Field.

Estimated Total Tourism Revenue (B): Calculated Field.

Average Total Estimated Tourism Revenue: Calculated Field.

Estimated multiplier/ Impact
on local income: Calculated Field.

Information Checklist			
✓	Contact	Information	Timing
	Karen McNutt, NS Tourism Tel: 902-424-6355 Fax: 902-424-0629 mcnuttk@gov.ns.ca	Fixed Room Occupancy	Monthly/ Annually
		Campground Occupancy	Monthly/ Annually
		NS Visitor Traffic	Annually
		Average Party Size	Bi-annually
	Heather Dixon CBHNP Tel: 902-285-2273	CBHNP Stakeholder Report	Annually
		Actual Visitor Numbers	Annually
	Marc Melanson Stats Can Tel: 902-426-6278	Cape Breton Island Visitor Expenditure	Bi-annually
	Lester Hanley Dept of Transportation Tel: 902-424-7909	Traffic Data	Annually
	Linda Sleep Dept. of Transportation Tel: 902-424-4259	Ferry Traffic Data	Annually
	Tom Wilson/ John Cotton	Municipal Tax Information	Annually

Festival/Event Evaluation

This worksheet requires some key pieces of information. Please use this guide to fill in the blanks and complete the evaluation.

- ❶ How many overnight stays did visitors to this event have? _____
- ❷ How many visitors were present (include delegates, family and travelling companions)? _____
- ❸ Number of attendees from outside the local community (at least 89 kms)? _____
- ❹ & ❺ Identify the number of visitors who are from out of town and require overnight accommodation and the number who are local.
- ❻ Identify the proportion of guests that stayed in hotels as compared to those who stayed in homes. _____% in hotels, _____% in homes. Note: Typical visitors to Cape Breton Island breakout as follows: 63% in hotels, 37% in homes.
- ❼ Estimate the number of local host homes. Average is 2.5 - 3.2 per host home.
- ❽ Estimate the average expenditure per person on the local event per day. Some examples are as follows:
\$11 Apple Blossom, \$14 Atlantic Winter Fair, \$20 Moosehead Grand Prix, \$31 Centre Bras d'Or Festival, \$39 Halifax Buskers Festival, \$40 Wooden Boat Festival, \$41 Antigonish Highland Games

Festival/Event:		Dates:	
Contact:		❶ Number visitor nights festival runs:	
Phone:	Fax:	❷ Total visitors/attendance:	
Weather conditions during festival		❸ Number from outside the community (at least 80 kms)	
Was the weather a positive, neutral or negative factor this year?		Did festival revenues increase or decrease this year?	
		What was the % increase or decrease?	
Comments:			
Over night Visitors:			
❹ Total off-Island attendees:		Avg. Expenditure	
❻ _____% in Hotel X ❹ = _____	X ❶ = _____ →	X \$230	\$
❻ _____% in Homes X ❹ = _____	X ❶ = _____ →	X \$207	\$
❼ Number of Host Homes = _____	→	X \$216	\$
Day Visitors: Local Visitors/Delegates			
❺ Total Local attendees:		X ❽ _____	\$
→			
Total			\$