



March 2006

ECONOMIC IMPACT ANALYSIS OF
ENTERPRISE CAPE BRETON CORPORATION
FESTIVAL AND EVENTS PROGRAM



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EXECUTIVE SUMMARY

Enterprise Cape Breton Corporation (ECBC) launched its Festival and Events Program in fiscal year 2002/2003 to assist incorporated, non-profit organizations in Cape Breton interested in hosting festivals and events. Since that time ECBC has provided approximately \$729,000 in funding assistance to two hundred and fourteen festivals and events throughout Cape Breton and Mulgrave area.

These festivals and events were attended by over 1.12 million people, of which 27% were off-Island visitors. These approximately 300,000 off-Island visitors generated a positive economic impact of \$76.2 million on the Gross Domestic Product (GDP) of Cape Breton, created 2,621 person years of employment for the area, and added approximately \$19.6 million to provincial and federal tax revenues during the four years of program funding.

Forty percent (40%) of festival organizers indicated they would not have been able to hold the festival or event without the support of the ECBC Festival and Events Program and ninety-four percent (94%) indicated that the event would not have been of the same quality without the support of the funding program.

Based on the net economic impact or Gross Domestic Product the total contribution to the Cape Breton economy from every \$1 in Festival and Events Program funding is \$104. Obviously the Festival and Events Program has made a very significant contribution to the Cape Breton economy over the past four years.

1.0 INTRODUCTION

1.1 STUDY OBJECTIVE

The objective of this study is to determine the economic impact of the ECBC Festival and Events Program on the Cape Breton Island economy over the past four years. Specifically the objective was to measure:

1. An estimation of incremental spending due to the funding of the festivals and events over the past four years and as a result of either:
 - Increased length of stay due to special event attendance;
 - Increased daily expenditure due to special event attendance; and
 - Increased number of visitors to the Cape Breton region due to the special event draw.
2. Direct, indirect and induced economic impacts on Cape Breton Island in terms of jobs, household income and Gross Domestic Product (at market prices)
3. Fiscal impacts on the Federal, Provincial and Cape Breton Municipal governments.

1.2 PROGRAM OVERVIEW

Enterprise Cape Breton Corporation (ECBC) launched its Festival and Events Program in fiscal year 2002/2003 to assist incorporated, non-profit organizations in Cape Breton interested in hosting festivals and events. The assistance was targeted to applicants with the potential to:

- Generate new visitation or serve visitors to the Island;
- Extend the length of stay and spending of the visitors;
- Improve the quality of the customer's experience and guest satisfaction;
- Create new and/or maintain jobs; and
- Serve new markets while not impacting local competition.

On an annual basis ECBC issued an RFP seeking project proposals from within Inverness County, Richmond County, Victoria County, Cape Breton County, the Town of Port Hawkesbury and the Mulgrave area, interested in hosting festivals and events in their community. Under this program ECBC provided grants up to \$7,500 to applicants who met the criteria of the program. Assistance for an event was required to be incremental to previous assistance and could not be provided for more than three consecutive years. Eligible costs for the program consisted of marketing (off-island) and capital.

Marketing included such things as:

- Design, typeset, print brochures and posters;
- Newspaper advertising;
- Radio advertising;
- Design, create and paint for signs;
- Design, create web pages and host on servers;
- On-Island marketing to target visitors currently in the region; and
- Other methods determined to be an integral part of the overall strategy.

Capital costs to help an organization/facility make improvements in order to host an event and/or meet a standard, and includes such items as:

- Lumber and materials for frames for tents, signs, booths, fences, etc.;
- Stages;
- Tents;
- Sound equipment;
- Lighting;
- Signs and booth;
- Fencing;
- Seating;
- Security equipment;
- Lumber, materials and labour for site enhancement;
- Parking;
- Permanent washroom facilities;
- Chairs and tables for halls;
- Kitchen appliances for suppers and meals; and
- Rentals, security, St. John's Ambulance

1.3 METHODOLOGY

An Excel based listing of all approved applications under the ECBC Festival & Events Program was received for the 2002/03, 2003/04, 2004/05 and 2005/06 fiscal years from ECBC. An in-house file review of the listed ECBC files was conducted at the ECBC office to capture information on attendance, festival length, budget and actual revenue and expenditures associated with the festival, ECBC contribution amount and applicant contact information. This information was entered into an Excel database. During our visit to Sydney we were able to complete a file review of 192 files. The original list of 222 provided included 8 cancelled or duplicate file entries, 3 where the file could not be located, 3 where the festival had not yet occurred and a further 16 where the final claim had not yet been submitted.

An economic impact assessment survey was designed (see Appendix E) to capture information from the festival and events organizers in addition to that contained in the ECBC files. A draft copy of the survey was submitted to the ECBC steering committee for approval. We attempted to contact by telephone in February 2006, the organizers of 202 festivals (we excluded festivals where a final claim was not yet submitted and no grant was received in previous years) and successfully contacted the organizers of 161 festivals, a response rate of 80%. Festival organizers were contacted by telephone to ask for their cooperation in completing the survey. Surveys were faxed or emailed to the organizers for review as some of the festivals dated back four years and the information requested would require organizers to retrieve festival records to respond. During the first telephone call a time was scheduled with the organizer to complete the survey by phone. A minimum of three attempts was made to contact each of the organizers by telephone.

Due to the lack of information available from festival organizers with regards to the spending of visitors attending their events an alternative source of information on spending was required. The Nova Scotia Tourism, Culture and Heritage Department was contacted and requested to provide a special run on the data collected as part of the 2004 Nova Scotia Tourism Visitor Exit Study. This special run refined the data to include only the findings for visitors who included Cape Breton in their trip to Nova Scotia.

Information gathered from the file review, surveys, and Nova Scotia Tourism Visitor Exit Study, special run was provided to our sub-contracted expert in input-output models, EcoTec Consultants, who developed an input-output model customized for tourism expenditures in Cape Breton.

2.0 IMPACT ANALYSIS OF FESTIVALS AND EVENTS

2.1 FESTIVAL AND EVENTS ASSISTED

ECBC provided assistance to two hundred and fourteen (214) festivals and events during the period April 1, 2002 to March 31, 2006. This represented approximately one hundred and fifty (150) individual festivals and events as funding could be received for up to three consecutive years. The number of festivals receiving funding by area of Cape Breton is shown in Table 1 below. A full listing of festivals funded over the period from April 1, 2002 to March 31, 2006 is provided in Appendix A.

AREA	2003	2004	2005	2006	TOTAL
Cape Breton County	22	21	36	25	104
Inverness County	5	4	9	9	27
Mulgrave Area	2	2	1	1	6
Port Hawksbury	3	3	2	0	8
Richmond County	5	7	11	15	38
Victoria County	<u>5</u>	<u>10</u>	<u>6</u>	<u>10</u>	31
TOTAL	<u>42</u>	<u>47</u>	<u>65</u>	<u>60</u>	<u>214</u>

The average ECBC funding amount is \$3,400. Sixty percent (60%) of the survey respondents indicated that the ECBC funding was very beneficial in leveraging additional funding from sponsors and other funding partners. The percentage of total expenditures covered by ECBC funding on average for all four years combined was fifteen percent (15%). A listing of the top 10 festivals and events ranked by ECBC funding as a percentage of total expenditures for each of the four years is shown in Appendix B. The lower the percentage, the higher the ranking as this shows that the festival organizers were able to leverage other funding and generate other sources of revenue to host the festival. Although sixty percent (60%) of festival organizers indicated they may have been able to hold the festival or event without the support of the ECBC Festival and Events Program, ninety-four percent (94%) indicated that the event would not have been of the same quality without the support of the funding program.

FISCAL YEAR	ECBC CONTRIBUTION EVENT REVENUE		OTHER REVENUE TOTAL REVENUE		TOTAL EVENT EXPENSES
2003	\$ 204,800	\$ 563,632	\$ 689,000	\$ 1,457,432	\$ 1,440,000
2004	182,400	712,779	609,700	1,504,879	1,525,600
2005	165,600	612,947	580,700	1,359,247	1,338,500
2006	176,600	342,848	124,500	643,948	509,500
TOTAL	\$ 729,400	\$ 2,232,206	\$ 2,003,900	\$ 4,965,506	\$ 4,813,600

Many of the festivals and events were held throughout the year assisting in building the tourism market outside of the main tourism months of July and August. As can be seen from the following bar graphs the number of festivals being held in the shoulder season (June, September, and October) has increased in the 2005 and 2006 fiscal years. A breakdown of the festivals and events commencing in a particular month in each of the four fiscal years is shown in the graphs below.

FIGURE 1 - NUMBER OF FESTIVALS AND EVENTS HELD APRIL TO JUNE

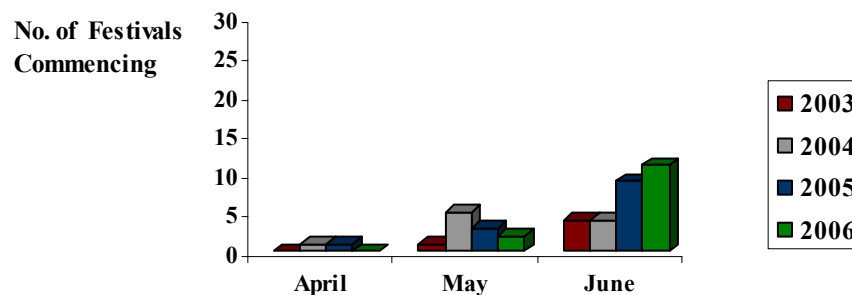


FIGURE 2 - NUMBER OF FESTIVALS AND EVENTS HELD JULY TO SEPTEMBER

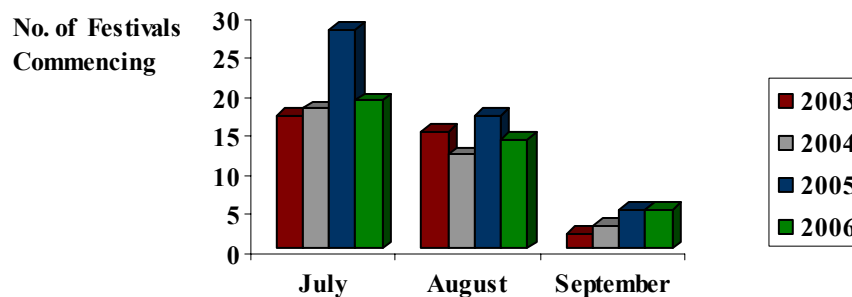


FIGURE 3 - NUMBER OF FESTIVALS AND EVENTS HELD OCTOBER TO DECEMBER

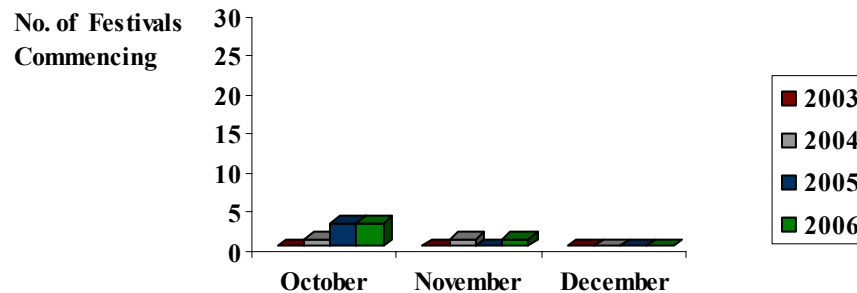
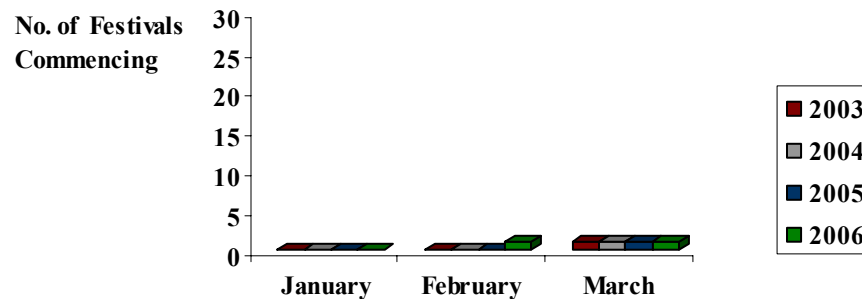
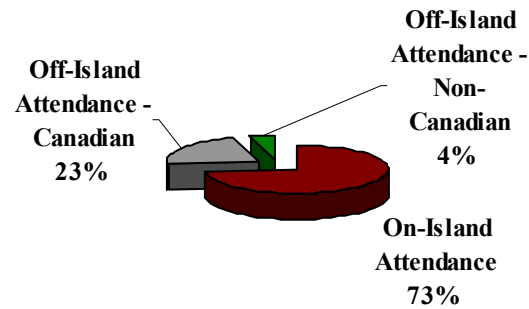


FIGURE 4 - NUMBER OF FESTIVALS AND EVENTS HELD JANUARY TO MARCH



2.2 VISITOR PROFILE

The two hundred and fourteen (214) festivals and events were attended by over 1.12 million individuals. This number is based on attendance records provided by festival organizers for one-hundred and eighty-nine (189) festivals and events and budgeted attendance for twenty-two (22) festivals and events where an actual attendance estimate was not available. There were three (3) events where neither, a budget or actual attendance figures were available. The average attendance for all events was extrapolated to include these events.

FIGURE 5 - FESTIVALS AND EVENTS ATTENDANCE BREAKDOWN

Twenty-seven percent (27%) of those in attendance were visitors from outside Cape Breton with eighty-four percent (84%) of off-Island visitors from within other areas of Canada including mainland Nova Scotia.

It is important to note the following in interpreting the attendance results:

- Only forty-eight percent (48%) of the festivals and events were gated events where accurate attendance figures could be captured.
- There are some festivals that included a number of different events, therefore attendance figures could include the same individual counted multiple times.
- In many cases festival and events organizers although able to provide reasonably accurate attendance figures were not able to provide a breakdown of attendance by origin with the same level of accuracy.
- For some events where participant registration was required, event organizers provided attendance figures based on participants but were not able to provide attendance figures for spectators.
- At some un-gated festivals and events attendance figures were based on guestbook recordings and therefore may be understated as no assurance that 100% of attendees signed the guestbook.

The festivals and events that received funding from ECBC varied with regards to the attendance they attracted with a low of 33, to events attracting as many as 45,000 individuals. Average attendance at the festival and events was 5,200 individuals. The top ten festivals each year by attendance is shown in Appendix C.

The 2005/2006 Louisbourg Summer of Festivals attracted the highest off-island attendance of any individual festival at 24,000. Appendix D contains the top ten festivals by off-Island attendance.

2.3 ESTIMATED EXPENDITURES

2.3.1 Festivals and Events

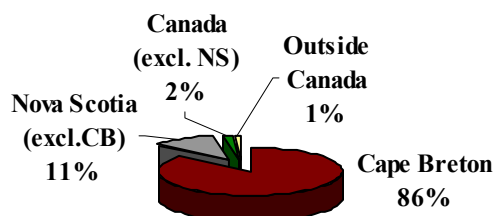
Information was gathered from the ECBC files on the expenditures of the festival and events organizers. The information on actual expenditures was available from ninety percent (90%) of the files. For the other files an estimate was made based on budgeted information and extrapolation of the actual results.

DESCRIPTION	2003	2004	2005	2006	TOTAL EXPENDITURE
Marketing Expenditures	\$ 219,700	\$ 174,200	\$ 145,200	\$ 170,200	\$ 709,300
Salaries, including local entertainers	388,100	494,500	448,000	123,100	1,453,700
Capital Expenditures	163,600	220,400	231,400	241,100	856,500
Other Expenditures	668,500	685,900	513,900	684,200	2,552,500
Total Expenditures	\$ 1,439,900	\$ 1,575,000	\$ 1,338,500	\$ 1,218,600	\$ 5,572,000

2.3.1.1 Marketing Expenditures

Festival organizers were asked in the survey administered by MRSB to provide a breakdown of their marketing expenditures occurring in Cape Breton, Nova Scotia (outside of Cape Breton), Canada (excluding Nova Scotia), and outside Canada. The largest majority of expenditures, eighty-six percent (86%) for marketing occurred in Cape Breton.

FIGURE 6 - BREAKDOWN OF WHERE MARKETING EXPENDITURES OCCURRED



2.3.1.2 Employment

Festivals and events held in Cape Breton tend to include a large volunteer effort on behalf of community residents and organization members, however the job creation as a result of these events should not be overlooked. On average, three full-time positions, fifty-two seasonal positions and one-hundred and thirty seven short-term positions for festival duration are created each year.

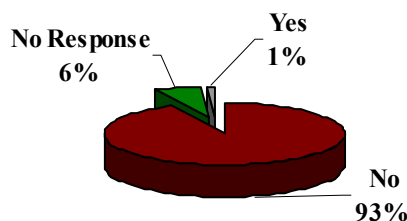
TABLE 4 JOB CREATION					
DESCRIPTION	2003	2004	2005	2006	AVERAGE
Number of Permanent Paid Full Time Employees	3	4	4	1	3
Number of Paid Seasonal Employees	60	40	81	26	52
Average Number of Weeks Worked per Seasonal Employee	8	10	7	8	8
Number of Paid Employees on Site for Festival	167	110	193	76	137
Average Number of Hours Worked per Employee During Festival	40	28	31	29	32

2.3.2 Attendees

The telephone survey completed with festival and event organizers included the question “Were attendees surveyed to determine their spending in Cape Breton during their vacation?”

One percent (1%) of the respondents indicated that they had surveyed attendees with regards to spending, however they were not able to provide the results of the survey as the festivals were held in 2003/2004 and they were no longer able to find the information.

FIGURE 7 - PERCENTAGE OF ORGANIZERS SURVEYING ATTENDEES ON SPENDING



It was noted by a number of festival and events organizers that the events are quite often largely dependent on volunteers and they do not have the resources to survey attendees to capture information. In lieu of the availability of actual spending information gathered directly at the events, visitor expenditure patterns were derived from the 2004 Nova Scotia Tourism Visitor Exit Study. Nova Scotia Tourism, Culture and Heritage were able to produce a special run to refine the Visitor Exit Study data to include only the findings for visitors who included Cape Breton in their trip to Nova Scotia.

TABLE 5	
AVERAGE EXPENDITURE AMONG ALL PARTIES VISITING CAPE BRETON IN 2004	
DESCRIPTION	EXPENDITURE
Fixed Roof Accommodations	\$ 391
Campgrounds	30
Meals and Beverages in Restaurants	335
Ferry and/or Airfare to /from Cape Breton	381
Auto Repair/Gas/Oil	150
Other Transportation Fares (Taxis, Car Rentals, etc.)	105
Groceries/Liquor	88
Nova Scotia Cultural Products (handmade crafts, original artwork, NS music, NS books)	72
Clothing Purchases	45
Other Shopping Purchases	19
Recreation and Entertainment (includes entry fees for attractions, tours, museums, casinos, theatres, festivals, green fees, etc.)	71
Other	7
Total Expenditure	\$ 1,696
Total Expenditure (excluding air/ferry)	\$ 1,315
 Average party size for Cape Breton is 2.4 persons per party.	
 <i>2004 Nova Scotia Visitor Exit Study -Cape Breton Special Run (Visitors who included Cape Breton in their trip to Nova Scotia.)</i>	

The information provided from the 2004 Nova Scotia Visitor Exit Study – Cape Breton Special Run was further refined by EcoTec Consultants to eliminate the categories of Nova Scotia cultural products and recreation and entertainment to avoid double counting with organizers revenue on souvenir sales and festival admissions in the input-output economic model.

3.0 ECONOMIC IMPACT ANALYSIS

3.1 METHODOLOGY

There are various means for measuring the economic impact of an activity. The fundamental theory behind economic impact analysis is that expenditures are multiplied through the economy; an increase in spending on goods and services generates a need for additional goods and services. Using **input-output** analysis, we are able to estimate this cascading effect through the economy. The input-output table is a financial model of an economy's production system. It shows the interconnections that exist between the various sectors of the economy when goods and services are produced.

The revenues and expenditures of a particular sector are used to drive an input-output model to derive economic impact. The model generates impact estimates for employment and gross domestic product (GDP) at the direct, indirect and induced levels.

- **Direct Impacts** arise from the expenditures made in carrying out the activity in question: e.g., payments made to festival employees or suppliers of goods or services.
- **Indirect Impacts** arise from the linkages into the broader economy. For example, if equipment is purchased from a local equipment manufacturer, the local manufacturer would have to increase its output to meet the demand. An increase in raw materials and human resources required leads to a further increase in activity in industries supplying the goods and services needed to produce these items, and so on.
- **Induced Impacts** also arise from linkages into the broader economy. They result from the spending and re-spending of incomes earned in the sectors that meet direct and indirect demand. For example, the festival employees and the equipment manufacturer's employees spend their incomes on clothing and food. These expenditures help to support retail businesses that in turn pay wages that are spent and re-spent, and so on.

Expenditures for wages and salaries tend to have a high local impact. Expenditures for equipment tend to be more diffused, especially if the equipment and materials are purchased from outside the region. Typically, the economic leakage associated with capital expenditures is quite high, which means that local impacts are low.

Undoubtedly, Cape Breton Island is the source for many of the goods and services consumed by the festivals and events, but it is also true that a portion of their requirements were satisfied by importing goods from outside the region.

A festival employee who received wages would spend a certain amount on goods and services produced in Cape Breton and an amount on goods and services imported from off-island. Using this assumption, we can estimate what proportion of each dollar spent

stays in the region, and how much leaks out in the form of imports and taxes - assuming that income tax and GST, are leakages on the local economy.

Capital asset purchases have much different indirect and induced impact on employment and GDP than direct payments for wages and operating expenditures. This is partly due to the fact that Cape Breton has a relatively small manufacturing sector and as such, there is more leakage of economic benefits to other regions or provinces.

Following is the primary data gathered underlying the economic impact calculations. The data was obtained from multiple sources including the Festival and Event Organizers, Enterprise Cape Breton Corporation files, and the Nova Scotia Tourism, Culture and Heritage Department.

TABLE 6 VISITOR SPENDING	
Total spending per party	\$ 1,170
Average party size	<u>2.4</u>
Total spending per person	<u>\$ 487.50</u>

This amount was then applied to the total visitation for the Cape Breton festivals and Events to derive the total visitors spending.

TABLE 7 NUMBER OF VISITORS FROM OUTSIDE CAPE BRETON				
DESCRIPTION	2003	2004	2005	2006
Visitors				
Total visitors	97,674	75,601	79,371	33,326
Total amount of visitors' spending	<u>\$ 47,616,179</u>	<u>\$ 36,855,678</u>	<u>\$ 38,693,579</u>	<u>\$ 16,246,601</u>
Residents and Organizers				
Total Expenditures (excluding marketing)	1,230,902	1,382,334	1,260,567	629,870
Marketing	<u>213,070</u>	<u>174,192</u>	<u>150,151</u>	<u>91,467</u>
	1,443,972	1,556,526	1,410,718	721,337
GRAND TOTAL	<u>\$ 49,060,151</u>	<u>\$ 38,412,204</u>	<u>\$ 40,104,297</u>	<u>\$ 16,967,938</u>

3.2 QUANTITATIVE ECONOMIC IMPACT

3.2.1 Gross Economic Impact

Cape Breton's many festivals and events contribute significantly to the local economy. They provide employment for residents and economic opportunity for both urban and rural communities in Cape Breton. These benefits result from an injection of off-island

revenues by visitors, the spending by the individual event organizers, as well as the re-spending of this income injection throughout the region.

The gross economic impact of the festivals and events sponsored by Enterprise Cape Breton Corporation for the fiscal years ended March 31, 2003 through March 31, 2006, as listed in the appendix, is as follows:

	2003	2004	2005	2006
Direct	\$ 49.06	\$ 38.41	\$ 40.10	\$ 16.97
Indirect	7.36	5.68	5.94	2.45
Induced	<u>17.60</u>	<u>13.90</u>	<u>14.48</u>	<u>6.03</u>
GRAND TOTAL	<u>\$ 74.02</u>	<u>\$ 57.99</u>	<u>\$ 60.52</u>	<u>\$ 25.45</u>

Note – For the fiscal year ended March 31, 2006, many of the festivals and events had already received the maximum of three years of funding or in some instances, the event had not yet occurred as of the date of the analysis. In addition, the events held in the three years prior to 2006 were larger events, with more people attending as is evident in Appendix C. As a result, the economic impacts and the impacts on employment appear lower for 2006 than for the three previous periods.

3.2.2 Gross Domestic Product

Gross Domestic Product (GDP) refers to the "value added" or profit generated by the initial expenditures. It represents the value of consumption of goods and services in the economy resulting from the factors of production net of the cost of purchased inputs. The GDP is considered the "Net Economic Impact".

The total estimated impact of the ECBC funded festivals and events on the gross domestic product of Cape Breton ranges from a high of \$26 million in 2003 to a low of \$9 million in 2006.

TABLE 9
GROSS DOMESTIC PRODUCT

		<i>In Millions of Dollars</i>			
		2003	2004	2005	2006
Direct	\$	17.96	\$ 14.16	\$ 14.70	\$ 6.22
Indirect		2.77	2.17	2.26	0.93
Induced		<u>5.07</u>	<u>4.04</u>	<u>4.18</u>	<u>1.74</u>
GRAND TOTAL	\$	<u>25.80</u>	<u>\$ 20.37</u>	<u>\$ 21.14</u>	<u>\$ 8.89</u>

3.2.3 Tax Assessment

The input-output model also allows us to estimate income taxes levied on economic activity, primarily taxes on salaries and taxes on profits. Data from Provincial and Federal tax legislation are used to obtain an estimate of these taxes. This calculation is in the form of an average tax rate multiplied by the salaries, in the case of individual income tax. Indirect taxes are estimated for the various transactions that take place in the economy between industries. Taken together, these calculations provide an estimate of total income taxes associated with the sector, and of the taxes collected by the various levels of government.

The total tax revenues generated by the festivals and events funded by ECBC averaged \$2.25 million in provincial tax revenues and \$2.7 million in federal tax revenues per year over the four years reviewed.

TABLE 10
PROVINCIAL GOVERNMENT TOTAL TAX REVENUES

		<i>In Millions of Dollars</i>			
		2003	2004	2005	2006
Direct	\$	1.67	\$ 1.29	\$ 1.35	\$ 0.57
Indirect		0.31	0.24	0.24	0.10
Induced		<u>1.06</u>	<u>0.83</u>	<u>0.86</u>	<u>0.36</u>
GRAND TOTAL	\$	<u>3.04</u>	<u>\$ 2.36</u>	<u>\$ 2.45</u>	<u>\$ 1.03</u>

TABLE 11				
FEDERAL GOVERNMENT TOTAL TAX REVENUES				
<i>In Millions of Dollars</i>				
	2003	2004	2005	2006
Direct	\$ 2.21	\$ 1.72	\$ 1.78	\$ 0.76
Indirect	0.37	0.29	0.30	0.12
Induced	<u>1.09</u>	<u>0.86</u>	<u>0.88</u>	<u>0.37</u>
GRAND TOTAL	<u>\$ 3.67</u>	<u>\$ 2.87</u>	<u>\$ 2.96</u>	<u>\$ 1.25</u>

3.2.4 Employment

The total employment generated by the festivals and events funded by Enterprise Cape Breton Corporation, for the four-year review period totalled 2,621 person years, broken down by year in the following table.

TABLE 12				
EMPLOYMENT				
<i>In Person-Years</i>				
	2003	2004	2005	2006
Direct	796.2	612.5	636.4	263.4
Indirect	48.6	37.2	38.3	15.9
Induced	<u>59.5</u>	<u>46.3</u>	<u>47.4</u>	<u>19.6</u>
GRAND TOTAL	<u>904.3</u>	<u>696.0</u>	<u>722.0</u>	<u>298.9</u>

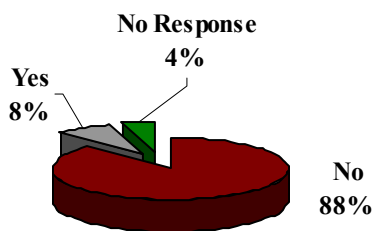
A person-year is defined as someone who works about 2,000 hours per year (equivalent to 40 hours over a 50 week period). So for example if 100 workers are employed on average 500 hours per year, then this is equivalent to 25 person-years of employment. Similarly, one worker, employed for 500 hours per year would be ¼ person years.

3.3 QUALITATIVE IMPACT

Festival organizers were asked during the survey whether or not attendees of their events were surveyed on areas that would provide beneficial information to the organizers for supporting funding requests. On average only six percent (6%) of the festivals conducted surveys. A frequent comment received by our survey team was that they did not have the resources to carry out a survey during the event and would have required additional funding to do so. The following responses should be interpreted with caution due to the low response rate from festival organizers.

3.3.1 Factor in Decision to Visit Cape Breton

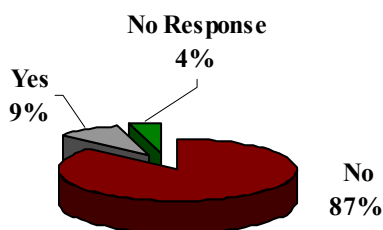
FIGURE 8 - PERCENTAGE OF ORGANIZERS SURVEYING ATTENDEES ON IMPACT OF FESTIVAL OR EVENT ON THEIR DECISION TO VISIT CAPE BRETON



The eight percent (8%) of festivals that surveyed attendees as to whether the festival was a factor in their decision to visit Cape Breton found that for sixty-two percent (62%) of their off-Island attendees the festival was the main reason for their decision to visit Cape Breton. Nineteen percent (19%) indicated that the festival was a factor in their decision.

3.3.2 Factor in Lengthening Stay in Cape Breton

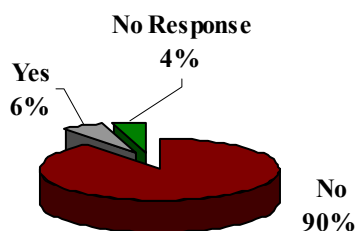
FIGURE 9 - PERCENTAGE OF ORGANIZERS SURVEYING ATTENDEES ON IMPACT OF FESTIVAL OR EVENT ON LENGTHENING THEIR STAY IN CAPE BRETON



The nine percent (9%) of festivals that surveyed their attendees on whether or not the festival was a factor in lengthening their stay in Cape Breton found that fifty-seven percent (57%) of their off-Island visitors indicated that their length of stay was lengthened on average by two and one-half days.

3.3.3 First Visit to Cape Breton

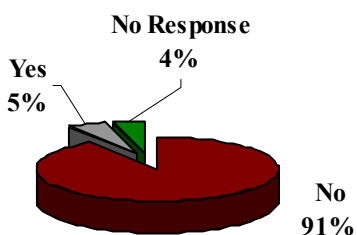
FIGURE 10 - PERCENTAGE OF ORGANIZERS SURVEYING ATTENDEES ON WHETHER OR NOT IT WAS THEIR FIRST VISIT TO CAPE BRETON



The six percent (6%) of festivals who surveyed their attendees as to whether it was their first visit to Cape Breton found that for twelve percent (12%) of their off-Island visitors it was their first visit to Cape Breton.

3.3.4 Improved Quality of their Vacation Experience

FIGURE 11 - PERCENTAGE OF ORGANIZERS SURVEYING ATTENDEES ON WHETHER OR NOT THE FESTIVAL OR EVENT IMPROVED THE QUALITY OF THEIR VACATION



The five percent (5%) of festivals who surveyed their attendees as to whether the festival improved the quality of their vacation experience in Cape Breton found that for one hundred percent (100%) of their off-Island visitors the festival did improve the quality of their vacation experience.

3.4 CONCLUSION

Off-Island visitors generated a positive economic impact of \$76.2 million on the Gross Domestic Product (GDP) of Cape Breton, created 2,621 person years of employment for the area, and added approximately \$19.6 million to provincial and federal tax revenues during the four years of ECBC Festival and Events Program funding. Based on the net economic impact or Gross Domestic Product the total contribution to the Cape Breton economy from every \$1 in Festival and Events Program funding is \$104. Obviously the Festival and Events Program has made a very significant contribution to the Cape Breton economy over the past four years.

APPENDIX A

LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
CAPE BRETON COUNTY FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2006	2005 JCI National Convention	Sydney
2005	25th Anniversary Car Show	Sydney
2005	25th Anniversary Car Show	Sydney
2006	40th Anniversary IBS Festival	Sydney
2004	Action Week 2003	Sydney
2006	Annual Dance Competition & Workshops	Sydney Mines
2005	Antique Car Festival	Whitney Pier
2005	Atlantic Canadian Highland Dancing Championships	Sydney
2003	Barraman's Fest	Iona/Christmas Island
2006	Ben Eoin Grand Prix	Ben Eoin
2004	Big Pond Festival	Big Pond
2005	Big Pond Festival	Big Pond
2003	Big Pond Summer Festival	Big Pond
2006	Canada Day Celebrations	Sydney Mines
2005	Canada Day Festival	Whitney Pier
2003	Canada Day on the Waterfront Festival	North Sydney Waterfront
2004	Canada Day on the Waterfront Festival	North Sydney
2005	Canada Day on the Waterfront Festival	North Sydney
2003	Canada Day Parade & Picnic	Sydney
2005	Cape Breton Bluegrass Festival	Marion Bridge
2006	Cape Breton Bluegrass Festival	Two Rivers
2006	Cape Breton Drag Racing Events	Sydney Airport
2005	Cape Breton Drag Racing-Airport	Sydney
2006	Cape Breton Fiddlers Run	Sydney
2004	Cape Breton International Drumfest Festival	Glace Bay
2005	Cape Breton International Drumfest Festival	Glace Bay
2006	Cape Breton Kennel Club Shows & Trials	Glace Bay
2004	Celebration of the Arts Concert Series	North Sydney
2005	Come Home Festival	Bateston
2003	Comunn Feis An Eilein	Christmas Island
2005	County Days	Westmount
2006	County Days & Winterfest	Sydney River
2003	Dockside Ceilidhs	North Sydney
2004	Feis an Eilein & Bu Deonach Leam Tileadh	Christmas Island
2005	Festival on the Bay	Glace Bay
2006	Festival on the Bay	Glace Bay/Port Hawkesbury
2004	Fort Petrie History Day	New Victoria
2005	Fort Petrie History Day	New Victoria
2006	Fort Petrie History Day	Fort Petrie
2005	Gaelic Summer Events Program-Feis en Eilein	Christmas Island
2003	Glace Bay Summerfest	Glace Bay
2004	Glace Bay Summerfest	Glace Bay
2005	Glace Bay Summerfest	Glace Bay
2003	Highland Gathering	North Sydney
2005	Historic Ghost Walks	Sydney
2006	Historic Ghost Walks 2005	Sydney
2004	Irish Variety Concert	Sydney
2003	John Hall Memorial Fishing Boat Races	Main-A-Dieu
2004	John Hall Memorial Fishing Boat Races	Main-a-Dieu
2005	John Hall Memorial Fishing Boat Races	Main-a-Dieu
2005	Johnny Miles Festival	Sydney Mines
2006	Johnny Miles Festival	Sydney Mines

LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA

CAPE BRETON COUNTY FESTIVALS AND EVENTS

ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2003	Lambert Todd Days Festival	Reserve Mines
2004	Lambert Todd Days Festival	Reserve Mines
2005	Lambert Todd Days Festival	Sydney
2003	Louisbourg Crabfest	Louisbourg
2004	Louisbourg Crabfest	Louisbourg
2005	Louisbourg Crabfest	Louisbourg
2004	Louisbourg Playhouse Events	Louisbourg
2005	Louisbourg Race Through Time	Louisbourg
2006	Louisbourg Summer of Festivals	Louisbourg
2006	Main-A-Dieu Lobsterfest	Main-a-dieu
2004	Maritime Horseshoe Pitching Championship	New Waterford
2005	Maritime Horseshoe Pitching Championships	New Waterford
2003	MingleFest 2002	Sydney
2006	Mira Bay Festival	Bateston
2003	Mira Gala Festival	Marion Bridge
2003	N.S. Celebration of the Arts Concert Series	North Sydney
2004	N.S. Highland Dance Championships	Sydney Mines
2006	National Under 18 JVC Cup Championships	Sydney
2006	New Waterford Coal Bowl Classic	New Waterford
2003	New Waterford Coal Dust Days	New Waterford
2004	New Waterford Coal Dust Days	New Waterford
2005	New Waterford Coal Dust Days	New Waterford
2003	North Sydney Bartown Festival	North Sydney
2004	North Sydney Bartown Festival	North Sydney
2005	North Sydney Bartown Festival	North Sydney
2005	North Sydney Music Concert Series	North Sydney
2003	Pierscape Community Arts Festival	Whitney Pier,Sydney
2005	Pow Wow & Music Festival	Membertou
2004	Regatta/Centennial Celebrations	Sydney
2005	Rock the Dock	Glace Bay
2005	Route Halifax Saint Pierre Ocean Race	Louisbourg
2006	Royal C.B. Yacht Club Annual Regatta	Sydney
2005	Royal C.B. Yacht Club Regatta	Sydney
2004	Saus e International Choral Federation	Sydney
2006	Scotchtown School Renuion	Scotchtown
2003	Seaside Daze	Dominion
2004	Seaside Daze	Dominion
2005	Seaside Daze	Dominion
2006	Soundscapes Series	Louisbourg
2003	St. Pierre Ocean Race 2002	Louisbourg
2006	Summer Music Festival	North Sydney
2005	Summer People Festival	Port Morien
2006	Summer People Festival/Morien Memories	Port Morien
2005	Syd-Acadie	Sydney
2003	Sydney Action Week Festival	Sydney
2005	Sydney Mines Homecoming	Sydney Mines
2006	Sydney-Toronto Reunion 2005	Whitney Pier
2005	Treaty Days	Membertou
2003	Vince Ryan Memorial Oldtimers Hockey Tournament	Sydney
2003	Waterfront Gala Concert (Lobster Palooza)	Sydney
2004	Whitney Pier Festival of Visual Arts & PierScape	Sydney
2005	Whitney Pier Festival of Visual Arts & PierScape	Sydney

TOTAL FESTIVALS IN CAPE BRETON COUNTY

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
INVERNESS COUNTY FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2006	100 Years of Photo/Angus L. MacDonald Military Tribute	Inverness
2006	35th Celebration of Valley Mills Fire Department	River Denys
2005	Bay of Whales Festival	Pleasant Bay
2006	Bay of Whales Festival	Pleasant Bay
2005	Broad Cove Concert	Broad Cove
2003	Broad Cove Scottish Concert	Broad Cove
2003	Chestico Days	Port Hood
2005	Chestico Days Summer Festival	Chestico
2004	Chestico Summer Days Festival	Chestico
2004	Festival de l'Escaouette	Cheticamp
2006	Festival de l'Escaouette	Cheticamp
2004	Festival of Rural Development	Orangedale
2006	Highland Connection	Belle Cote
2005	Houston We Have a Ceilidh	Judique
2005	Inverness Centennial Celebrations	Inverness
2004	Inverness Gathering	Inverness
2003	Kintyre Farm Scottish Concert	Judique
2005	L'Accueil 2004	Sainte-Joseph du Moine
2006	Le Grand Cercle 2005	Cheticamp
2005	Les Journee de Moine	LeMoine
2003	Mabou Ceilidh Days	Mabou
2006	Mabou Ceilidh Festival	Mabou
2005	Margaree Summer Festival	Margaree
2005	Route 19 Wednesday Night Ceilidh	Judique
2006	St. Joseph du Moine Scottish Concert	St. Joseph du Moine
2003	Whycocomagh Summer Festival	Whycocomagh
2006	Whycocomagh Summer Festival	Whycocomagh
TOTAL FESTIVALS IN INVERNESS COUNTY		27

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
MULGRAVE AREA FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2003	Concert in the Cove Festival	Town of Mulgrave
2004	Concert in the Cove Festival	Town of Mulgrave
2006	Mulgrave Haunted House of Horrors	Town of Mulgrave
2003	Scotia Days Festival	Town of Mulgrave
2004	Scotia Days Festival	Town of Mulgrave
2005	Scotia Days Festival	Town of Mulgrave
TOTAL FESTIVALS IN MULGRAVE AREA		6

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
PORT HAWKESBURY FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2005	Ceilidh Concert Series	Port Hawkesbury
2004	Granville Green Concert Series	Port Hawkesbury
2005	Granville Green Concert Series	Port Hawkesbury
2003	Granville Greens Events	Port Hawkesbury
2003	Ship Harbour Days	Port Hawkesbury
2004	Ship Harbour Days	Port Hawkesbury
2004	Strait Area Festival	Port Hawkesbury
2003	Strait Area Waterfront Events	Port Hawkesbury
TOTAL FESTIVALS IN PORT HAWKESBURY		8

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
VICTORIA COUNTY FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2006	Baddeck Handcraft Festival	Baddeck
2003	Bay St. Lawrence Folk Festival	St.Margaret's Village
2004	Bay St. Lawrence Folk Festival	Bay St. Lawrence
2006	C.B. Pipe Band Championship	St. Anns
2004	Cabot Trail Relay	Baddeck
2005	Cabot Trail Relay Race	Baddeck
2006	Cabot Trail Relay Race	Cabot Trail
2005	Cabot Trail(Heart of the Highlands)Triathlon	Cabet Trail
2006	Central Cape Breton Community Days	Iona
2006	Englishtown Mussel Festival	Englishtown
2003	Events 2002	St.Anns
2003	Festival of Caoe Breton Fiddling	Dominion
2004	Festival of Cape Breton Fiddling	St. Ann's
2005	Festival of Cape Breton Fiddling	St. Ann's
2004	Gaelic College 2003 Event Series	St. Ann's
2006	Heart of the Highlands Triathlon	N.E. Highlands
2005	Highland Clans Days & Community Days in Iona	Iona
2004	Highland Clans Festival	Iona
2003	Highland Village	Iona
2004	Highland Village Event Series	Iona
2006	Hike the Highlands Festival	N.E. Highlands
2004	Quilt Retreat Workshops	St. Ann's
2005	Ross Ferry Cup	Ross Ferry
2004	South Haven Old School House Festival	South Haven
2005	South Haven Old School House Festival	South Haven
2006	South Haven Old School House Festival	South haven
2003	The Margaret Festival	Baddeck and Loiusburg
2004	The Margaret Play	St. Ann's
2006	Theatre on the Hill Summer Festival	St. Peters
2006	Up North Folk Festival	Cape North
2004	Wagmatcook Pow Wow	Wagmatcook
TOTAL FESTIVALS IN VICTORIA COUNTY		31

**LISTING OF FESTIVALS AND EVENTS BY COUNTY AND AREA
RICHMOND COUNTY FESTIVALS AND EVENTS**

FISCAL YEAR ENDING	FESTIVAL OR EVENT NAME	LOCATION OF EVENT
2006	32 anniversaire due Festival acadien de Petit-de-Grat	Petit-de-Grat
2005	Arichat Oceanview Festival	Arichat
2006	Atlantic Canada Storytelling Festival	Richmond
2006	Baraco Days Festival	St. Louis
2005	Baracos Days Festival	Louisdale
2006	Chapel Island Fishing Derby	Chapel Island
2004	Festival of Trees	St. Peters
2006	Festival of Trees	St. Peters
2006	Festival on the Lake	Samsonville
2004	Festival on the Rocks	Rocky Bay
2005	Festival on the Rocks	Rocky Bay
2005	Grand River Festival	Grand River
2004	Happy Days on River Inhabitants Festival	Lower River Inhabitants
2005	Happy Days on River Inhabitants Festival	Lower River Inhabitants
2006	Happy Days on River Inhabitants Festival	Lower River Inhabitants
2003	Harbourfest	D'Escousse
2003	Johnstown Milling Frolic	St.Peter's (Johnstown)
2005	Johnstown Milling Frolic	Johnstown
2006	Johnstown Milling Frolic	Johnstown
2005	July Festival Weekend	St. George's Channel
2005	Lakeside Community Festival	Lakeside
2003	L'Ardoise Acadian Festival	L'Ardoise
2004	L'Ardoise Acadian Festival	Lower L'Ardoise
2006	L'Ardoise Acadian Festival	L'Ardoise
2005	le Festival Acadien	Petit-de-Grat
2006	Loch Lomond Charity Fun Run	Loch Lomand
2004	Marble Mountain 2nd Annual Poker Run	Marble Mountain
2005	Marble Mountain 3rd Annual Poker Run/Family Day	Marble Mountain
2006	Nicolas Denys Days	St. Peters
2003	Rendez Vous 2002	Arichat
2006	Richmond County Seniors Expo	River Bourgeois
2003	River Bourgeois Festival	River Bourgeois
2004	River Bourgeois Festival	River Bourgeois
2005	River Bourgeois Festival	River Bourgeois
2004	Stone Mountain Music Festival	Lynches River
2006	Stora Enso Minor Hockey Tournament	Port Hawkesbury
2006	Summer Festival Weekend	St. Georges Channel
2006	W.M.Y.C./ MacDonell/Dundee Regattas	St. Peters

TOTAL FESTIVALS IN RICHMOND COUNTY

APPENDIX B

**TOP TEN RANKED FESTIVALS BY ECBC FUNDING
AS A PERCENTAGE OF TOTAL EXPENDITURES**

**TOP 10 RANKED BY ECBC FUNDING AS A PERCENTAGE OF TOTAL
EXPENDITURES -2002/2003**

FESTIVAL/EVENT NAME	ECBC FUNDING AS % OF TOTAL EXPENDITURES
Waterfront Gala Concert (Lobster Palooza)	4.2%
Halifax-St. Pierre Ocean Race 2002	5.8%
Vince Ryan Memorial Oldtimers Hockey Tournament	6.3%
Gaelic College Foundation Events 2002	7.5%
Harbourfest	8.7%
N.S. Celebration of the Arts Concert Series	9.8%
Scotia Days Festival	10.1%
Big Pond Summer Festival	10.9%
Highland Village	11.4%
Seaside Daze	11.4%

**TOP 10 RANKED BY ECBC FUNDING AS A PERCENTAGE OF TOTAL
EXPENDITURES -2003/2004**

FESTIVAL/EVENT NAME	ECBC FUNDING AS % OF TOTAL EXPENDITURES
Louisbourg Playhouse Events	2.5%
International Choral Federation	3.8%
Inverness Gathering	4.3%
Quilt Retreat Workshops	4.5%
Action Week	5.1%
Granville Green Concert Series	7.9%
Cabot Trail Relay	8.0%
Cape Breton International Drumfest Festival	8.9%
Regatta/Centennial Celebrations	9.0%
River Bourgeois Festival	9.3%

**TOP 10 RANKED BY ECBC FUNDING AS A PERCENTAGE OF TOTAL
EXPENDITURES -2004/2005**

FESTIVAL/EVENT NAME	ECBC FUNDING AS % OF TOTAL EXPENDITURES
Rock the Dock	2.6%
Cabot Trail Relay Race	3.2%
North Sydney Bartown Festival	3.9%
Pow Wow & Music Festival	4.4%
Inverness Centennial Celebrations	5.9%
Granville Green Concert Series	6.0%
Seaside Daze	6.7%
New Waterford Coal Dust Days	6.7%
Canada Day on the Waterfront	7.5%
Happy Days on River Inhabitants	7.9%

**TOP 10 RANKED BY ECBC FUNDING AS A PERCENTAGE OF TOTAL
EXPENDITURES -2005/2006**

FESTIVAL/EVENT NAME	ECBC FUNDING AS % OF TOTAL EXPENDITURES
Cabot Trail Relay Race	4.5%
Le Grand Cercle 2005	9.1%
Main-A-Dieu Lobsterfest	9.2%
Cape Breton Kennel Club Shows & Trials	10.7%
Richmond County Seniors Expo	12.3%
Mabou Ceilidh Festival	12.3%
2nd Annual C.B. Bluegrass Festival	13.2%
Baraco Days Festival	13.9%
Festival on the Lake	15.2%
Up North Folk Festival	17.2%

APPENDIX C

TOP TEN FESTIVALS RANKED BY TOTAL ATTENDANCE

TOP 10 RANKED BY TOTAL ATTENDANCE - 2002/2003

FESTIVAL/EVENT NAME	TOTAL ATTENDANCE
Granville Green	42,000
Glace Bay Summerfest	40,000
Coal Dust Days	38,019
North Sydney Bartown Festival	35,210
2002 Sydney Action Week Festival	34,000
Seaside Daze	33,319
Dockside Ceilidhs	22,400
Chestico Days	9,400
Ship Harbour Days	8,400
Concert in the Cove Series	7,500

TOP 10 RANKED BY TOTAL ATTENDANCE - 2003/2004

FESTIVAL/EVENT NAME	TOTAL ATTENDANCE
Action Week 2003	41,500
North Sydney Bartown Festival	40,000
New Waterford Coal Dust Days	35,016
Granville Green Concert Series	33,500
Glace Bay Summerfest	32,500
Seaside Daze	30,607
Louisbourg Playhouse Events	12,892
Chestico Summer Days Festival	11,000
Scotia Days Festival	8,000
Canada Day on the Waterfront Festival	7,000

TOP 10 RANKED BY TOTAL ATTENDANCE - 2004/2005

FESTIVAL/EVENT NAME	TOTAL ATTENDANCE
North Sydney Bartown Festival	45,000
Glace Bay Summerfest	35,000
Granville Green Concert Series	32,000
Seaside Daze	29,015
New Waterford Coal Dust Days	21,359
Chestico Days Summer Festival	11,274
Scotia Days Festival	10,000
Sydney Mines Homecoming	9,480
Johnny Miles Festival	7,500
Canada Day on the Waterfront	7,000

TOP 10 RANKED BY TOTAL ATTENDANCE - 2005/2006

FESTIVAL/EVENT NAME	TOTAL ATTENDANCE
Louisbourg Summer of Festivals	40,000
Summer Music Festival	9,450
Festival Acadien	8,000
Johnny Miles Festival	7,500
100 Years of Photo/Angus L. MacDonald Military Tribute	7,056
Cape Breton Drag Racing Events	6,360
Canada Day Celebrations	5,500
Nicolas Denys Days	5,000
Festival de l'Escaouette	4,569
Mabou Ceilidh Festival	4,500

APPENDIX D

TOP TEN RANKED FESTIVALS BY OFF-ISLAND ATTENDANCE

TOP 10 RANKED BY OFF-ISLAND ATTENDANCE - 2002/2003

FESTIVAL/EVENT NAME	TOTAL OFF-ISLAND ATTENDANCE
Dockside Ceilidhs	21,952
2002 Granville Green	16,800
North Sydney Bartown Festival	5,986
Concert in the Cove Series	5,500
Coal Dust Days	5,277
Seaside Daze	4,472
Chestico Days	4,324
Strait Area Waterfront Events	4,128
Glace Bay Summerfest	4,000
Sydney Action Week Festival	1,975

TOP 10 RANKED BY OFF-ISLAND ATTENDANCE - 2003/2004

FESTIVAL/EVENT NAME	TOTAL OFF-ISLAND ATTENDANCE
Granville Green Concert Series	13,400
North Sydney Bartown Festival	11,200
New Waterford Coal Dust Days	6,545
Chestico Summer Days Festival	4,950
Scotia Days Festival	4,750
Action Week 2003	4,425
Strait Area Festival	3,249
Glace Bay Summerfest	3,225
Canada Day on the Waterfront Festival	2,450
Seaside Daze	2,308

TOP 10 RANKED BY OFF-ISLAND ATTENDANCE - 2004/2005

FESTIVAL/EVENT NAME	TOTAL OFF-ISLAND ATTENDANCE
Granville Green Concert Series	12,800
North Sydney Bartown Festival	12,600
Scotia Days Festival	6,750
Chestico Days Summer Festival	6,426
New Waterford Coal Dust Days	5,941
Seaside Daze	3,629
Ceilidh Concert Series	3,151
Rock the Dock	2,800
Canada Day on the Waterfront	2,450
Cape Breton Drag Racing-Airport	2,415

TOP 10 RANKED BY OFF-ISLAND ATTENDANCE - 2005/2006

FESTIVAL/EVENT NAME	TOTAL OFF-ISLAND ATTENDANCE
Louisbourg Summer of Festivals	24,000
100 Years of Photo/Angus L. MacDonald Military Tribute	4,872
Festival Acadien	2,800
Soundscapes Series	2,550
Cape Breton Drag Racing Events	2,226
Festival de l'Escaouette	1,737
Sydney-Toronto Reunion 2005	1,650
Nicolas Denys Days	1,500
Le Grand Cercle 2005	1,356
Mulgrave Haunted House of Horrors	1,208

APPENDIX E

ECONOMIC IMPACT ASSESSMENT SURVEY

**ECBC FESTIVAL AND EVENTS PROGRAM
ECONOMIC IMPACT ASSESSMENT SURVEY**

Festival Name: _____	Indicated Fiscal YR funding received in: <input type="checkbox"/> 2002/03 Ref. No. _____ <input type="checkbox"/> 2003/04 Ref. No. _____ <input type="checkbox"/> 2004/05 Ref. No. _____ <input type="checkbox"/> 2005/06 Ref. No. _____
Applicant: _____	Amount of Funding Received: <input type="checkbox"/> 2002/03 _____ <input type="checkbox"/> 2003/04 _____ <input type="checkbox"/> 2004/05 _____ <input type="checkbox"/> 2005/06 _____
Primary Contact: _____	
Telephone No.: _____	
Interview Date and Time: _____	
Email/Fax: _____	

PLEASE NOTE THAT THROUGHOUT THE SURVEY THE YEAR REFERS TO THE ECBC FISCAL YEAR COMMENCING IN APRIL AND ENDING IN MARCH.

1. Would your association have been able to hold the festival or event without the support of the ECBC Festival and Events Program?

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

2. Would the festival or event have been of the same quality without the support of the ECBC Festival and Events Program?

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

3. Did the ECBC Festival and Events Program funding assist in the leveraging of other funding sources, sponsorships or donations?

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

4. Was the event gated? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

5. Please provide attendance figures if captured? *(Fill in any information we have available from file review prior to conducting survey.)*

Attendance	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Cape Breton Residents				
Off-Island Canadian Residents				
Off-Island Non-residents of Canada				
Total Attendance				
Off-Island No breakdown – Need to breakdown by Canadian and Non-resident Canadian				
Out of Town – Need to breakdown by Cape Breton Resident, Off-Island Canadian and Off-Island Non-resident Canadian				
Estimated % of off-island (only if no attendance figures available)				
Please provide explanation of how you estimated percentage:				

6. Please provide the following detail on revenue and expenditures for the festival? *(If the festival was not held in a particular year please "X" that year out prior to asking this question. Fill in any information we have available from file review.)*

NOT REQUIRED - SUFFICIENT INFORMATION WAS OBTAINED DURING FILE REVIEW.

7. Please provide a percentage breakdown of your marketing expenditures spent in the following locations:

Percentage of Marketing Expenditures				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Cape Breton				
Nova Scotia (excluding Cape Breton)				
Canada (excluding NS)				
Outside of Canada				

8. Please provide the following detail for the festival? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

Job Creation				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Number of full-time permanent paid employees				
Number of seasonal employees				
Average length of time worked by seasonal employees (months, weeks)				
Number of employees on site for festival				
Average length of time worked by on site employees (excluding permanent and seasonal indicated above (weeks, days, hours)				

- 9.

- a. Were attendees surveyed to determine if the festival was a factor in their decision to visit Cape Breton? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

- b. If tracking occurred please provide the following information:

Percentage of Off-Island Attendees				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Factor in decision for visiting Cape Breton				
Main reason for visiting Cape Breton				

10.

- a. Were attendees surveyed to determine if the festival was a factor in lengthening their stay in Cape Breton? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

- b. If tracking occurred please provide the following information:

Length of Stay				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Percentage of attendees indicating that stay in Cape Breton was lengthened as a result of festival.				
Average number of days that stay in Cape Breton was lengthened by.				

11.

- a. Were attendees surveyed to determine if this was their first visit to Cape Breton? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

- b. If tracking occurred please provide the following information:

First Time Visitor				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Percentage of off-Island residents in Canada for which it was a first time visit.				
Percentage of off-Island non-residents of Canada for which it was a first time visit.				

12.

- a. Were attendees surveyed to determine if the festival improved the quality of their vacation experience in Cape Breton? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

- b. If tracking occurred please provide the following information:

Improved Quality of Vacation Experience				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Percentage of off-Island residents in Canada who experienced improved quality.				
Percentage of off-Island non-residents of Canada who experienced improved quality.				

13.

- a. Were attendees surveyed to determine their spending in Cape Breton during their vacation? *(If the festival was not held in a particular year please "X" that year out prior to asking this question.)*

<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No

- b. If tracking occurred please provide the following information:

Visitor Spending in Cape Breton				
	<u>2002/03</u>	<u>2003/04</u>	<u>2004/05</u>	<u>2005/06</u>
Fixed roof accommodations				
Campgrounds				
Meals at restaurants, snacks, etc.				
Groceries/liquor				
Entertainment, including outdoor plays (theatre), bowling, etc.				
Shopping - Souvenirs				
Shopping - Clothing				
Transportation – Air				
Transportation – Ferry				
Transportation – Car rental				
Transportation – taxis, etc.				
Transportation – Gasoline				
Transportation – Car Repairs				
Other (Specify: _____)				

APPENDIX F

ECONOMIC IMPACT TERMINOLOGY

Economic Impact Terminology

Initial Expenditure - refers to the sum total of all expenditures made by residents and visitors. It indicates the total magnitude of spending as a result of the events.

Gross Domestic Product (GDP) - refers to the "value added" or profit generated by the initial expenditure. It represents the value of production of goods and services in the economy resulting from the factors of production net of the cost of purchased inputs. The GDP is considered the "Net Economic Impact".

Direct Impact - the direct impact refers to the impact on the *front line* businesses or the impact at the *point of sale* by the initial spending in the region.

Indirect Impact - refers to the impact on the suppliers of the *front line* businesses by the initial spending in the region.

Induced Impact - is the long-term impact resulting from employees spending their wages and salaries earned as a result of the direct and indirect impacts on other goods and services.

Industry Output - also referred to as the total economic activity, is the total of all direct, indirect and induced impacts on all goods and services produced within the region. The industry output is considered the "Gross Economic Impact."

Federal Taxes – include corporate income tax, personal income tax, and goods and services taxes.

Provincial Taxes – include corporate income tax, personal income tax, and sales tax.

Local/Municipal Taxes – include business and personal property taxes. Local taxes should be considered as the proportion of the local tax base that is supported by expenditures as a whole or for a specific event or sector.

Employment - refers to the number of person-years of employment supported by the expenditures. This figure is a combination of both full and part-time jobs.

Multiplier - refers to incremental dollars generated for every dollar initially spent in the region. The multiplier for jobs refers to the number of jobs that are supported by every million dollars of initial spending in the region. Multipliers are a measure of the spin-off effect. For example, if the multiplier for GDP is 1.5, then this implies that, for every dollar of GDP directly generated by front-line businesses and their direct providers, an additional \$0.50 of GDP is generated in spin-off activity.