

Canadian Sport Tourism Alliance



Alliance canadienne du tourisme sportif

2009 Antigonish Highland Games

Economic Impact Assessment

September 2009

The following analysis provides the economic impact of the 2009 Antigonish Highland Games, hosted in Antigonish, Nova Scotia from July 16-18 2009, as generated by the Sport Tourism Economic Assessment Model, Professional version.

Economic Impact Assessment Funding Partners

The Canadian Sport Tourism Alliance wishes to acknowledge the financial support of:

Antigonish Regional Development Authority



Antigonish Highland Society,



Nova Scotia Economic and Rural Development



Economic and Rural Development

Nova Scotia Health Promotion and Protection



**Health Promotion
and Protection**

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1.0 Background

2009 marked the 146th anniversary of the Antigonish Highland Games, the oldest continuously held Highland Games in North America. The event has grown considerably from its beginnings to an event that spans more than one week with an event calendar that features more than 50 activities. Visitors come to the region from all corners and while many are local or from Halifax, visitors come from across Canada (from Victoria to the Territories), across the U.S. (from Maine to Florida to California to Washington) and from around the world (China, Japan, Germany, France, England and Scotland).

The event was a huge success from a spectators stand point, attracting 2,000 unique out of town spectators over the course of the event. Many visitors make annual trips to the Antigonish Highland Games, with attendees often citing the games as being an important factor in determining the timing of a trip to the region. The combined expenditures of these visitors, along with those of the event host society, generated substantial economic benefits in Antigonish and for the Province of Nova Scotia as a whole. This report details the measurement of the economic impact of the 2009 Antigonish Highland Games (AHG), with the next section of the report providing details of the intercept survey that was conducted in order to ascertain both the number of visitors and the expenditures that visitors made while in Antigonish for the event. Section 3 provides details of operational expenditures and revenues that further contributed to the impact of the event, while Section 4 presents the STEAM-PRO¹ results from the combined expenditures of the spectators and the host society's operational expenditures. Section 5 concludes the document with a summary of the findings. The appendices include additional information regarding the economic impact model, a glossary of the terms used and a copy of the survey.

¹The Canadian Sport Tourism Alliance's (CSTA's) **Sport Tourism Economic Assessment Model**, Professional version (STEAM PRO) was used to generate the economic impact estimates detailed in this report. STEAM PRO, which was developed in 2006, is a model that has been designed to incorporate the results of primary data collected from event visitors and the budget / capital expenditures of event organizers and others to prepare economic impact assessments. The model is based on the Canadian Tourism Research Institute's (CTRI - a branch of The Conference Board of Canada) TEAM model, which is the most widely used tourism economic impact model in Canada. The results of STEAM PRO are fully consistent with the CSTA's STEAM model. A more detailed description of STEAM PRO is contained within Appendix 1.

2.0 Methodology / Survey Results

Information regarding the composition and spending of spectators and participants at the 2009 Antigonish Highland Games was collected through the administration of a face-to-face intercept survey. The survey captured essential information to determine the origin of spectators attending the event and the expenditures of out-of-town visitors to Antigonish County. The survey was conducted using Palm PDAs running Techneos Entryware software². A copy of the survey instrument used can be found in Appendix 3³.

Survey Results

A total of 554 visitor parties were approached at various events over the course of the games, with 443 parties agreeing to participate (a rejection rate of 20%). Of this group, 17 parties had been previously surveyed (3.8%), yielding a total of 426 valid surveys. The number of intercepts completed at each of the events during the games is shown in Figure 2.1. The proportion of visitors to each of the events varied considerably, with some events, especially those that ran earlier in the week of the games, being predominantly attended by locals, whereas visitors came out on the Saturday and Sunday of the games (Figure 2.2). The overall sample of valid surveys was split nearly evenly between visitors and locals, with visitors accounting for 52%, or 223 of the overall number of responses.⁴ Local residents were asked whether they came from the town or county of Antigonish and the sample found 41% came from the town of Antigonish while 59% came from Antigonish County. For the visitors attending the games, just over one-third came from Nova Scotia, with another third coming from other parts of Canada, with respondents coming from as far away as Victoria, Whitehorse, and Yellowknife. Residents of the U.S. accounted for just over one-quarter of visitors intercepted, with Massachusetts being the most common state of origin. Other U.S. visitors came from all over the country, with the majority being from Eastern Seaboard states such as Maine, New York, Connecticut and Pennsylvania (Figure 2.3).

²For more information please visit www.techneos.com.

³The survey and methodology were prepared in consultation with the “Guidelines for Measuring Tourism Economic Impact At Gated Festivals and Events”, available at:

<http://www.tourism.gov.on.ca/english/tourdiv/research/resources.htm>

⁴This sample size of 223 out of town responses representing 684 out of town spectators yields statistically significant confidence intervals of +/- 3.0 % for statistics reporting all visitors, 5.7% for sameday visitors, 5.4% for overnight visitors using commercial accommodation and 4.7% for overnight visitors without commercial accommodation.

Figure 2.1 Intercepts by Event

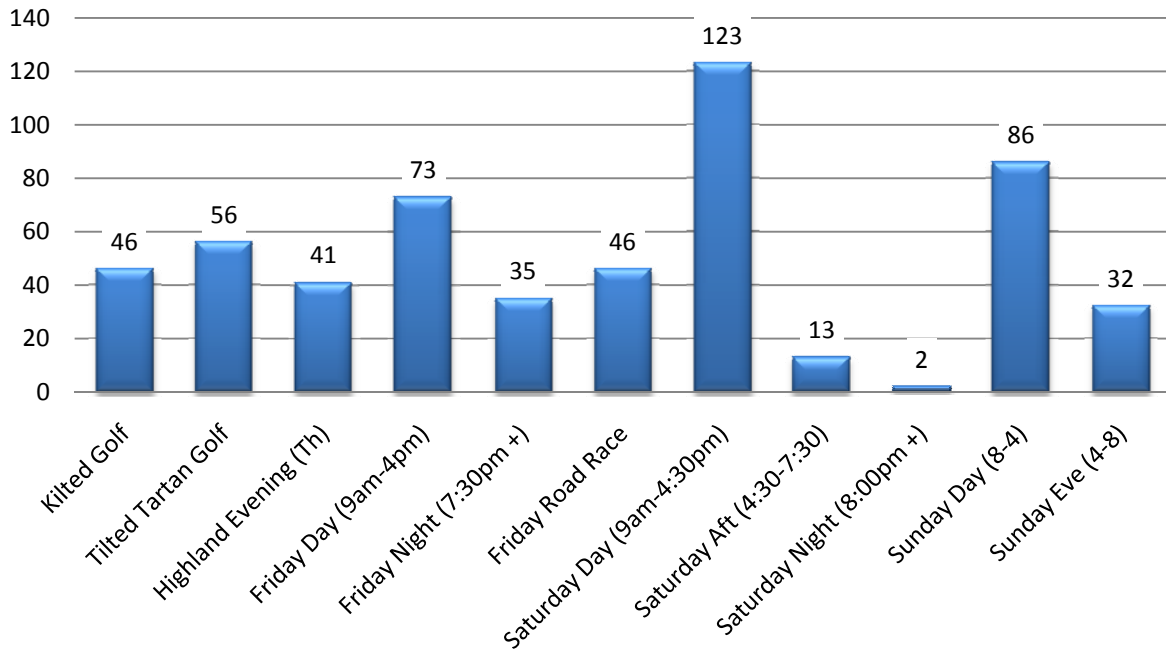


Figure 2.2 Visitor Attendance by Event

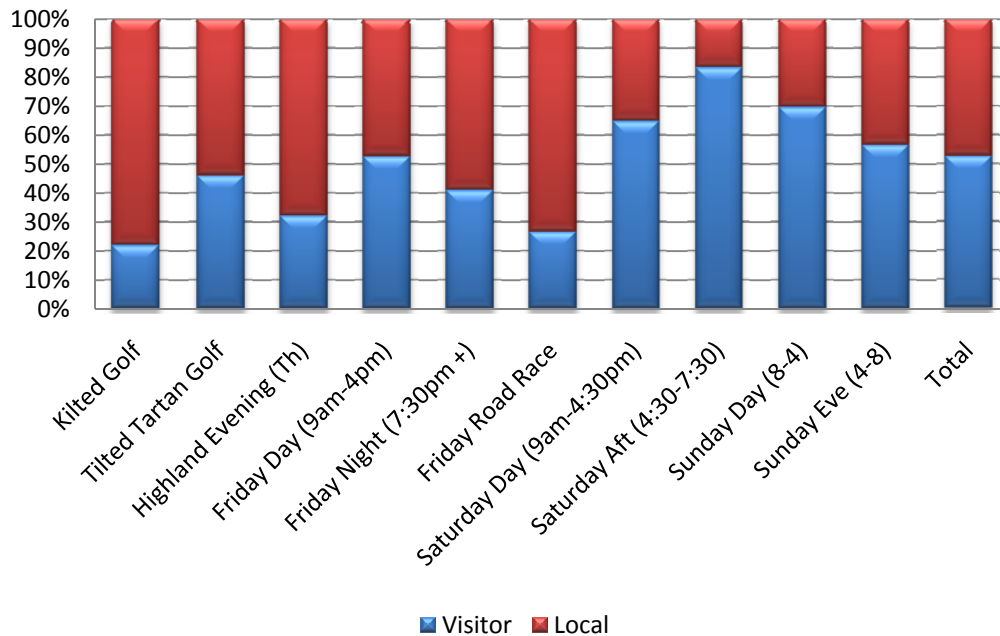
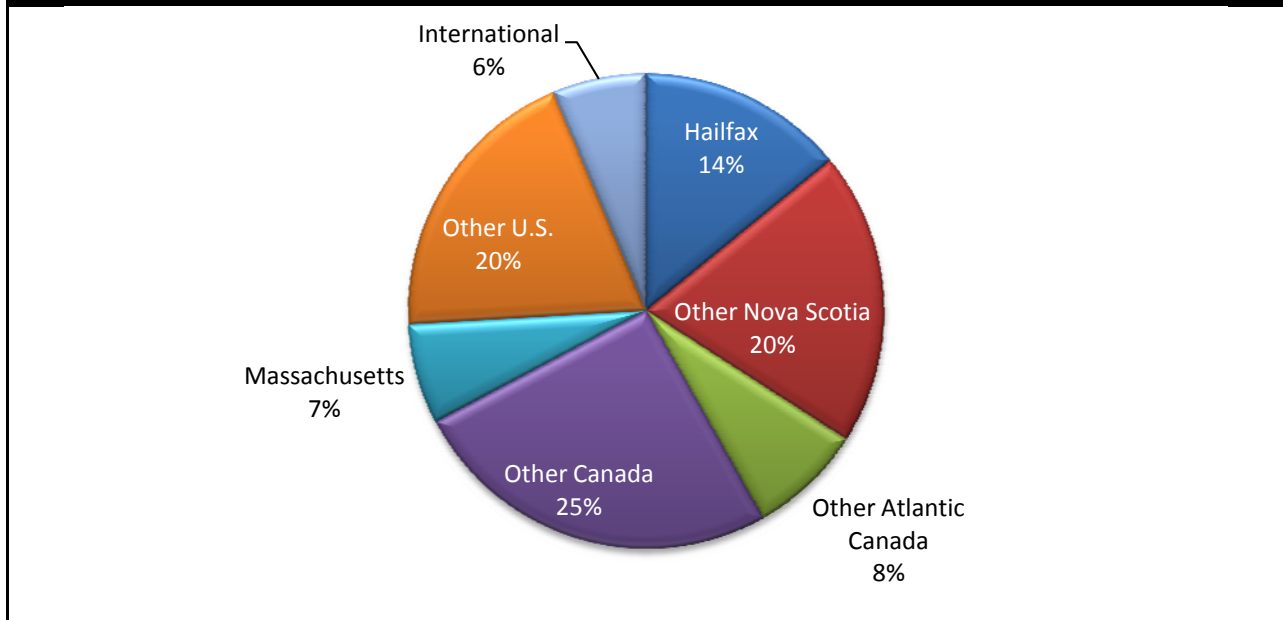


Figure 2.3 Visitor Origin

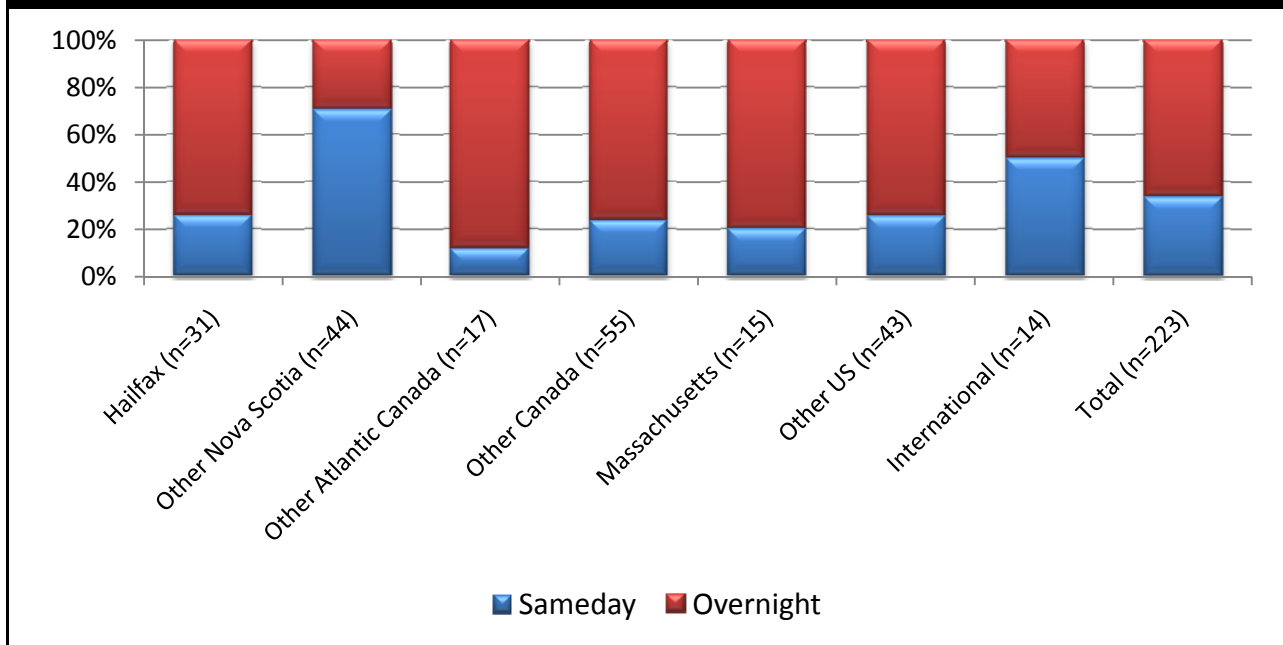
(Where are you from?)



One of the key findings is that a considerable number of visitors to the region only made day trips to the Antigonish Highland Games, as illustrated in Table 2.4. As shown in the visitor expenditure section below, overnight visitors to the region, and particularly those staying in commercial accommodation, have a much larger impact on the region as their spending is considerably higher.

Figure 2.4 Same day vs. Overnight in Antigonish by Visitor Origin

(How many nights will be spent in Antigonish?)



Visitor Expenditures

Spectators

Out-of-town visitors were asked about their expenditures while in Antigonish, with the results broken out for sameday and overnight visitors. A considerable number of overnight visitors to the region did not make use of commercial accommodation; they stayed with friends and relatives or rented / owned a cottage in the region, and as a result, their expenditures are considerably lower. The survey found that those who stayed in commercial accommodation had twice the expenditures (per person) as compared to those staying in non-commercial accommodations. The difference becomes larger on a per-person per night basis as the average trip length is much longer (6.2 nights vs. 3.7 nights) for those who are not using commercial accommodation.

The typical same-day visitor to the Antigonish Highland Games spent \$65 per person, or almost \$180 per visitor party. Visitors who made use of commercial accommodation spent \$386 per person per trip, or just over \$1,000 per visitor party. For those who did not use commercial accommodation, the average spending per party per trip was \$720, however their average party size was larger (4.0 vs. 2.7), thus spending per person was just over \$180 (Table 2.2).

Table 2.3, and Figure 2.5, below, illustrate the total expenditures made by visitors to Antigonish. The largest component of visitor expenditures was on accommodation, accounting for over one quarter of visitor expenditures in the Antigonish region, followed by food and beverage expenditures both on and off site (26%), personal vehicle expenses (13%), and event tickets (12%). In total, visitors to Antigonish who came as spectators for the 2009 Antigonish Highland Games spent \$521,000.

Participants

In addition to the expenditures made by event spectators, those participating in the event also added significantly to the economic impact of the event. In total there were 1,160 performers, competitors, judges, and officials at the AHG, of which 690 were from outside of Antigonish County. This group accounted for 547 room nights at hotels and at St. Francis Xavier University, with an additional 162 room nights occupied in campgrounds and private homes.

Table 2.2: Visitor Expenditures (Per visitor party per trip)

| | Sameday | Overnight - with Commercial Accommodation | Overnight – no Commercial Accommodation |
|-----------------------------|-----------------|---|---|
| <i>Nights in Antigonish</i> | 0.00 | 3.71 | 6.20 |
| <i>Party Size</i> | 2.76 | 2.70 | 3.96 |
| Accommodation | \$0.00 | \$464.45 | \$41.35 |
| On-Site Food & Beverage | \$32.72 | \$73.52 | \$87.08 |
| Event Tickets* | \$43.16 | \$81.28 | \$79.63 |
| Off-Site Food & Beverage | \$26.35 | \$155.20 | \$113.43 |
| Grocery / Other Food & Bev | \$11.96 | \$51.22 | \$112.84 |
| Recreation & Entertainment | \$0.54 | \$20.18 | \$30.20 |
| Clothing | \$2.77 | \$33.54 | \$35.00 |
| Shopping | \$8.42 | \$34.44 | \$59.16 |
| Car Rental | \$2.97 | \$46.28 | \$62.10 |
| Vehicle Exp | \$49.42 | \$80.94 | \$91.96 |
| Taxi | \$0.41 | \$1.57 | \$6.29 |
| Total | \$178.72 | \$1,042.62 | \$719.04 |
| <i>Per Person</i> | <i>\$64.83</i> | <i>\$386.86</i> | <i>\$181.54</i> |
| <i>Per Person per Night</i> | - | <i>\$104.35</i> | <i>\$29.30</i> |

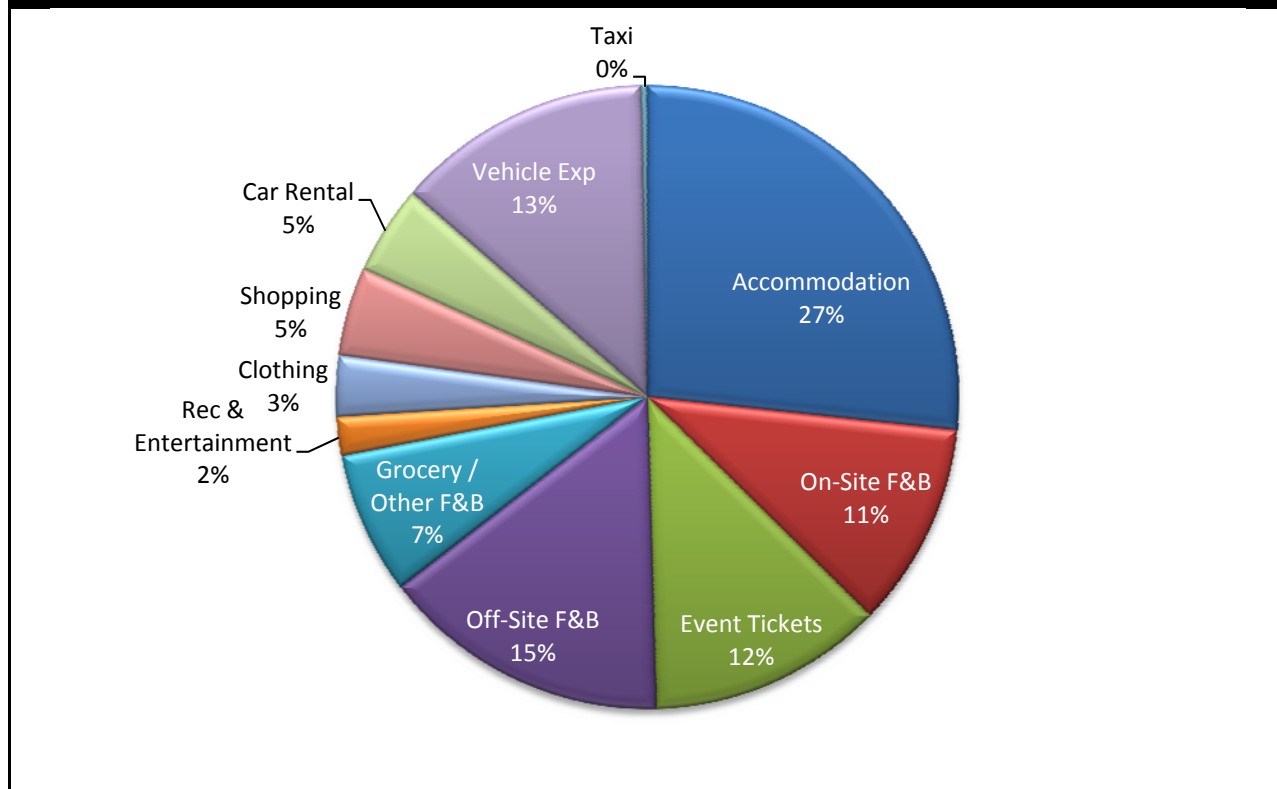
* While event tickets are reported above, they are not included in the aggregate visitor expenditures that are entered into the economic impact model total to avoid double counting; these are included as revenues in the host society's operations budget

Table 2.3 Total Visitor Expenditures

| | Sameday | Overnight - with Commercial Accommodation | Overnight – no Commercial Accommodation | Total |
|----------------------------|------------------|---|---|------------------|
| Total Visitors | 675 | 774 | 558 | 2,006 |
| Accommodation | \$0 | \$133,336 | \$5,824 | \$139,160 |
| On-Site Food & Beverage | \$22,083 | \$21,108 | \$12,263 | \$55,454 |
| Event Tickets* | \$29,134 | \$23,334 | \$11,214 | \$63,683 |
| Off-Site Food & Beverage | \$17,787 | \$44,554 | \$15,975 | \$78,316 |
| Grocery / Other Food & Bev | \$8,073 | \$14,704 | \$15,892 | \$38,669 |
| Recreation & Entertainment | \$365 | \$5,794 | \$4,253 | \$10,412 |
| Clothing | \$1,870 | \$9,628 | \$4,929 | \$16,427 |
| Shopping | \$5,683 | \$9,887 | \$8,331 | \$23,901 |
| Car Rental | \$2,007 | \$13,286 | \$8,745 | \$24,038 |
| Vehicle Exp | \$33,358 | \$23,236 | \$12,951 | \$69,545 |
| Taxi | \$274 | \$452 | \$886 | \$1,612 |
| Total | \$120,633 | \$299,319 | \$101,263 | \$521,215 |

Figure 2.5 Total Spectator Expenditure by Expense Category

(How much will you and your party spend in Antigonish over the duration of your trip?)



3.0 Operations Expenditures

The 2009 Antigonish Highland Games host society invested significantly in producing a high-caliber event, with expenditures covering the costs of organizing and producing the games. The spending of the host society in 2009 totaled \$288,000, covering a variety of items such as the costs of hosting the Highland evening fundraiser, office expenditures, as well as the expenditures pertaining to the event weekend itself.⁵

⁵ Value in-kind donations, as well as the contributed time of over 3,500 hours made by the 220 volunteers, were of vital importance to the success of the event. However, as both of these are non-traditional economic transactions, and in order to maintain consistency with other studies, they have been excluded from the economic impact.

4.0 Economic Impact Results

The combined spending of the more than 2,600 out of town spectators and participants to Antigonish plus the revenues and expenditures of the host society as a result of hosting the 2009 Antigonish Highland Games exceeded \$1.0 million, generating an estimated \$2.6 million in economic activity for the Province of Nova Scotia, of which \$1.6 million occurred in Antigonish. These expenditures supported \$877,000 in wages and salaries in the Province through the support of 30 jobs, of which an estimated 21 were in Antigonish⁶. The total net economic activity (GDP) generated by the event was \$1.2 million through the Province, with \$638,000 occurring in Antigonish.

Considerable tax revenues were also produced by the event, totaling \$536,000. The event supported federal government tax revenues of \$249,000, and an additional \$226,000 in taxes accrued to the Province of Nova Scotia. Moreover, \$61,000 in taxes was supported in Nova Scotia municipalities, of which \$43,000 accrued in Antigonish.

⁶ Jobs reported in this study refer to the number of jobs, vs. full time equivalent (FTE: two people working half time would represent two jobs or one FTE).

Table 4.1 Total Economic Impact

| | | Total Nova Scotia | | Total Antigonish | | Rest of Nova Scotia |
|------------------------------------|--|------------------------------|--|-----------------------------|--|--------------------------------|
| Initial Expenditure | | \$1,049,776 | | \$1,049,776 | | \$0 |
| Gross Domestic Product | | | | | | |
| Direct Impact | | \$330,039 | | \$330,039 | | \$0 |
| Indirect Impact | | \$474,008 | | \$120,162 | | \$353,846 |
| Induced Impact | | \$397,624 | | \$187,472 | | \$210,152 |
| Total Impact | | \$1,201,671 | | \$637,674 | | \$563,998 |
| Industry Output | | | | | | |
| Direct & Indirect | | \$1,739,321 | | \$1,228,423 | | \$510,898 |
| Induced Impact | | \$823,157 | | \$386,389 | | \$436,768 |
| Total Impact | | \$2,562,478 | | \$1,614,812 | | \$947,665 |
| Wages & Salaries | | | | | | |
| Direct Impact | | \$252,086 | | \$252,086 | | \$0 |
| Indirect Impact | | \$339,687 | | \$128,706 | | \$210,981 |
| Induced Impact | | \$285,520 | | \$139,596 | | \$145,925 |
| Total Impact | | \$877,294 | | \$520,380 | | \$356,906 |
| Employment (Full-year jobs) | | | | | | |
| Direct Impact ⁷ | | 12.7 | | 12.7 | | 0.0 |
| Indirect Impact | | 9.0 | | 3.4 | | 5.6 |
| Induced Impact | | 7.8 | | 4.5 | | 3.3 |
| Total Impact | | 29.5 | | 20.7 | | 8.9 |
| Taxes (Total) | | | | | | |
| Federal | | \$249,305 | | \$148,628 | | \$100,677 |
| Provincial | | \$225,919 | | \$143,655 | | \$82,264 |
| Municipal | | \$61,429 | | \$42,913 | | \$18,515 |
| Total | | \$536,653 | | \$335,197 | | \$201,456 |

⁷ Direct employment impact is generally extra shifts or overtime for existing workers rather than new employment.

5.0 Conclusion

The 2009 Antigonish Highland Games was a tremendous success by all measures, showcasing the heavy events, highland dancing, piping and drumming, concerts, ceilidhs, and more. The event was enjoyed by thousands of spectators, and supported through the efforts of hundreds of volunteers. Moreover, more than 2,600 spectators and participants attended the event in Antigonish County, with the resultant visitor expenditures totaling \$781,000. These expenditures, in combination with the operational expenditures and revenues of the host society totaled \$1.0 million, resulting in a net increase in economic activity of \$1.2 million throughout the Province, of which \$638,000 occurred in Antigonish. The total industry output (or gross economic activity) supported by the event was \$2.6 million, supporting \$877,000 in wages and salaries throughout the Province. In Antigonish, a total of \$520,000 in wages and salaries and 21 jobs were supported by the event.

Appendix 1: Economic Impact Methodology – Sport Tourism Economic Assessment Model

Background

Briefly, the purpose of STEAM is to calculate both the provincial and regional economic impacts of sport tourism. The economic impacts are calculated on the basis of capital and operating expenditures on goods, services and employee salaries, and on the basis of tourist spending within a designated tourism sector. The elements used to measure the economic impacts are Gross Domestic Product (GDP), Employment, Taxes, Industry Output and Imports. STEAM measures the direct, indirect & induced effects for each of these elements.

Technical Description of the Impact Methodology used by STEAM

STEAM and many other impact studies are based on input-output techniques. Input-output models involve the use of coefficients that are based on economic or business linkages. These linkages trace how tourist expenditures or business operations filter through the economy. In turn, the coefficients applied are then used to quantify how tourism related activity in a particular region generates employment, taxes, income, etc. The input-output approach indicates not only the direct and indirect impact of tourism, but can also indicate the induced effect resulting from the re-spending of wages and salaries generated.

All impacts generated by the model are given at the direct impact stage (i.e. the "front line" businesses impacted by tourism expenditures), indirect impact stage (i.e. those industries which supply commodities and/or services to the "front line" businesses) and the induced impact stage (induced consumption attributable to the wages and salaries generated from both the direct and indirect impact). In this sense, the model is closed with respect to wages. Imports are also determined within the model, so the model is closed with respect to imports. Exports are not endogenized (i.e. additional exports are not assumed with the induced impact) which consequently generates more conservative impacts. Another assumption of the model, which leads to more conservative impacts, is that not all commodities and/or services purchased are assumed to have at least one stage of production within the province. This assumption is crucial for souvenirs, gasoline and other commodities.

Taxes and employment are key economic considerations. However, as these concepts fall outside of the System of National Account Provincial input/output tables, their impacts must be calculated separately. Current tax and employment data for each region is used to econometrically estimate a series of coefficients and rates. These coefficients and/or rates are then applied to measures determined within the input-output framework of the model, yielding the final tax and employment figures.

Regional (Sub-Provincial) Impact Methodology

The method used to simulate intraprovincial commodity flows and ultimately regional impacts follows directly from regional economic principles. The principle is referred to as the "gravity model". Basically the "gravity model" states that the required commodity (& service) inputs will be "recruited" in a manner that takes into consideration economies of scale (i.e. production costs), transportation costs and the availability of specific industries. Economies of scale (i.e. lower production costs) are positively correlated with input demand while greater transportation costs are negatively correlated with input demand. Fulfilling that demand from other provincial regions is contingent on the fact that the specific industry does actually exist. An advantage of using the "gravity model" to simulate intraprovincial commodity flows is that as the industrial composition of the labour force changes, or as new industries appear for the first time in specific regions, the share of production between the various sub-provincial regions also changes.

By following this principle of the gravity model, all sub-provincial regions of a province are assigned a coefficient for their relative economies of scale in each industry (using the latest industry labour force measures) as well as a coefficient to represent the transportation cost involved to get each industry's output to the designated market. One variation on the "gravity model" principle involves the estimation of "relative trade distances" by incorporating different "weights" for different modes of transport. Once these coefficients are generated for all regions and over all industries, a measure of sensitivity (mostly relative to price, but in the case of service industries also to a "local preference criteria") is then applied to all commodities. Another variation on the strict "gravity model" approach is that the measure of sensitivity is adjusted by varying the distance exponent (which in the basic "gravity model" is 2) based on the commodity or service required. The variation in distance exponents revolve, principally, around two research hypotheses: (1) the greater the proportion of total shipments from the largest producer (or shipper), the lower the exponent, and (2) the greater the proportion of total flow which is local (intraregional), the higher the exponent.

Appendix 2: Glossary of Terms Used by STEAM

Initial Expenditure - This figure indicates the amount of initial expenditures or revenue used in the analysis. This heading indicates not only the total magnitude of the spending but also the region in which it was spent (thus establishing the "impact" region).

Direct Impact - Relates ONLY to the impact on "front-line" businesses. These are businesses that initially receive the operating revenue or tourist expenditures for the project under analysis. From a business perspective, this impact is limited only to that particular business or group of businesses involved. From a tourist spending perspective, this can include all businesses such as hotels, restaurants, retail stores, transportation carriers, attraction facilities and so forth.

Indirect Impact - Refers to the impacts resulting from all intermediate rounds of production in the supply of goods and services to industry sectors identified in the direct impact phase. An example of this would be the supply and production of bed sheets to a hotel.

Induced Impact - These impacts are generated as a result of spending by employees (in the form of consumer spending) and businesses (in the form of investment) that benefited either directly or indirectly from the initial expenditures under analysis. An example of induced consumer spending would be the impacts generated by hotel employees on typical consumer items such as groceries, shoes, cameras, etc. An example of induced business investment would be the impacts generated by the spending of retained earnings, attributable to the expenditures under analysis, on machinery and equipment.

Gross Domestic Product (GDP) - This figure represents the total value of production of goods and services in the economy resulting from the initial expenditure under analysis (valued at market prices).

NOTE: The multiplier (A), Total/Initial, represents the total (direct, indirect and induced) impact on GDP for every dollar of direct GDP. This is a measure of the level of spin-off activity generated as a result of a particular project. For instance if this multiplier is 1.5 then this implies that for every dollar of GDP directly generated by "front-line" tourism businesses an additional \$0.50 of GDP is generated in spin-off activity (e.g. suppliers).

The multiplier (B), Total/\$ Expenditure, represent the total (direct, indirect and induced) impact on GDP for every dollar of expenditure (or revenue from a business perspective). This is a measure of how effective project related expenditures translate into GDP for the province (or region). Depending upon the level of expenditures, this multiplier ultimately determines the overall level of net economic activity associated with the project. To take an example, if this multiplier is 1.0, this means that for every dollar of expenditure, one dollar of total GDP is generated. The magnitude of this multiplier is influenced by the level of withdrawals, or imports, necessary to sustain both production and final demand requirements. The less capable a region or province is at fulfilling all necessary production and final demand requirements, all things being equal, the lower the eventual economic impact will be.

GDP (at factor cost) - This figure represents the total value of production of goods and services produced by industries resulting from the factors of production. The distinction to GDP (at market prices) is that GDP (at factor cost) is less by the amount of indirect taxes plus subsidies.

Wages & Salaries - This figure represents the amount of wages and salaries generated by the initial expenditure. This information is broken down by the direct, indirect and induced impacts.

Employment - Depending upon the selection of employment units (person-years or equivalent full-year jobs) these figures represent the employment generated by the initial expenditure. These figures distinguish between the direct, indirect and induced impact. “Equivalent Full-Year Jobs”, if selected, include both part-time and full-time work in ratios consistent with the specific industries.

NOTE: The multiplier (B) is analogous to Multiplier (B) described earlier with the exception being that employment values are represented per \$1,000,000 of spending rather than per dollar of spending. This is done to alleviate the problem of comparing very small numbers that would be generated using the traditional notion of a multiplier (i.e. employment per dollar of initial expenditure).

Industry Output - These figures represent the direct & indirect and total impact (including induced impacts) on industry output generated by the initial tourism expenditure. It should be noted that the industry output measure represents the **sum** total of all economic activity that has taken place and consequently involve double counting on the part of the intermediate production phase. Since the Gross Domestic Product (GDP) figure includes only the **net** total of all economic activity (i.e. considers only the value added), the industry output measure will always exceed or at least equal the value of GDP.

Taxes - These figures represent the amount of taxes contributed to municipal, provincial and federal levels of government relating to the project under analysis. This information is broken down by the direct, indirect and induced impacts.

Imports - These figures indicate the direct, indirect and induced final demand and intermediate production requirements for imports both outside the province and internationally.

Appendix 3: 2009 Antigonish Highland Games Survey

Antigonish v1

Event

1 Event Surveyed

- Kilted Golf
- Tilted Tartan Golf
- Wed July 15
- Thurs July 16
- Highland Evening (Th)
- Friday Day (9am-4pm)
- Friday Night (7:30pm +)
- Friday Road Race
- Saturday Day (9am-4:30pm)
- Saturday Aft (4:30-7:30)
- Saturday Night (8:00pm +)
- Sunday Day (9-4)
- Sunday Eve (4-8)

Intro

- 2 Hello, my name is _____, and I am conducting a survey as to the economic impact on the behalf of the Antigonish Highland Society. Can I please speak to someone in your travel party who is knowledgeable with your trip planning and expenditures?

- Yes
- No

Previous

- 3 Have you or anyone in party previously been surveyed at this event by a surveyor using a PDA?

- Yes
- No

Ptysize

4 Including yourself, how many people are in your immediate travel party?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 or more _____
- Define Travel Party

Run

5 How many members of your party have participated / will participate in the 5-mile road race?

Answer: _____

Ticktype

6 What kind of ticket did you use to enter the event today?

- Games, Field & Entertainment Passport
- Nightly Ceilidh Passport
- Friday Games
- Concert Under Stars
- Friday Night Ceilidh
- Saturday Games & Afternoon Ceilidh
- Tattoo
- Saturday Night Ceilidh
- Sunday Games & Closing Ceilidh
- Closing Ceilidh

Totalix

7 (Respondent Only) Over the entire duration of the Antigonish Highland Games, please indicate which tickets you have / will purchase

- Games, Field & Entertainment Passport
- Nightly Ceilidh Passport
- Friday Games
- Concert Under Stars
- Friday Night Ceilidh
- Saturday Games & Afternoon Ceilidh
- Tattoo
- Saturday Night Ceilidh
- Sunday Games & Closing Ceilidh
- Closing Ceilidh

Local

8 Did you travel from outside of Antigonish County to attend the Highland Games?

- Yes, out of town
- No, from Antigonish
- Define out of town

Local2

9 Are you from the town of Antigonish or from Antigonish County?

- Town of Antigonish
- Antigonish County

Origin

10 Where are you from?

- Canada
- U.S.
- Overseas _____

FSA

11 Can I have the first three digit of your postal code?

State

12 Which state?

- | | |
|---|--|
| <input type="checkbox"/> Alabama | <input type="checkbox"/> South Dakota |
| <input type="checkbox"/> Alaska | <input type="checkbox"/> Tennessee |
| <input type="checkbox"/> Arizona | <input type="checkbox"/> Texas |
| <input type="checkbox"/> Arkansas | <input type="checkbox"/> Utah |
| <input type="checkbox"/> California | <input type="checkbox"/> Vermont |
| <input type="checkbox"/> Colorado | <input type="checkbox"/> Virginia |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Washington |
| <input type="checkbox"/> Delaware | <input type="checkbox"/> West Virginia |
| <input type="checkbox"/> District of Columbia | <input type="checkbox"/> Wisconsin |
| <input type="checkbox"/> Florida | <input type="checkbox"/> Wyoming |
| <input type="checkbox"/> Georgia | |
| <input type="checkbox"/> Hawaii | |
| <input type="checkbox"/> Idaho | |
| <input type="checkbox"/> Illinois | |
| <input type="checkbox"/> Indiana | |
| <input type="checkbox"/> Iowa | |
| <input type="checkbox"/> Kansas | |
| <input type="checkbox"/> Kentucky | |
| <input type="checkbox"/> Louisiana | |
| <input type="checkbox"/> Maine | |
| <input type="checkbox"/> Maryland | |
| <input type="checkbox"/> Massachusetts | |
| <input type="checkbox"/> Michigan | |
| <input type="checkbox"/> Minnesota | |
| <input type="checkbox"/> Mississippi | |
| <input type="checkbox"/> Missouri | |
| <input type="checkbox"/> Montana | |
| <input type="checkbox"/> Nebraska | |
| <input type="checkbox"/> Nevada | |
| <input type="checkbox"/> New Hampshire | |
| <input type="checkbox"/> New Jersey | |
| <input type="checkbox"/> New Mexico | |
| <input type="checkbox"/> New York | |
| <input type="checkbox"/> North Carolina | |
| <input type="checkbox"/> North Dakota | |
| <input type="checkbox"/> Ohio | |
| <input type="checkbox"/> Oklahoma | |
| <input type="checkbox"/> Oregon | |
| <input type="checkbox"/> Pennsylvania | |
| <input type="checkbox"/> Rhode Island | |
| <input type="checkbox"/> South Carolina | |

Sameday

13 Are you making day trips or staying overnight away from home?

- Sameday
- Overnight

NumDT

14 How many same-day trips have you / will you be making?

Answer: _____

Nights1

15 In total, how many nights have you / will you spend away from home?

Answer: _____

Nights2

16 Will all of these nights be spent in Antigonish County (excluding New Glasgow and Port Hawkesbury)

- Yes
- No

NightsNS

17 How many nights have you / will you spend in Nova Scotia?

Answer: _____

NightsAN

18 How many nights have you / will you spend in Antigonish County?

Answer: _____

NightsComm

19 How many nights have you / will you spend in commercial accommodation (hotel, motel, B&B)?

Answer: _____

Ptyverify

20 Are you able to report the spending for all [@Pysize] members of your party for the duration of your stay in Antigonish, or would a different party size be more appropriate?

- Yes, I can report spending for all [@Pysize] members
- No, a different size would be better

Pysize2

21 Please enter a more appropriate party size:

Answer: _____

Spendintro

22 Now think about the money that you and your travel party have spent in Antigonish County on this trip. How much will your party spend on each of the following items? If your trip is not yet over, please provide your best estimate as to what you and your entire travel party will spend for your entire stay in Antigonish County. How much was spent on the following:

Spendcat

23 Spending per party per trip:

- Accommodation _____
- On-site food / bev/ other _____
- Event Tickets _____
- Off-site restaurant / pub _____
- Grocery / Other F&B _____
- Other Recreation & Entertainment _____
- Retail Clothing _____
- Other Shopping _____
- Car Rental _____
- Personal Vehicle Expenses (gas, repairs) _____
- Taxi _____

Importance

24 On a scale of 0 to 10, with 10 indicating that the 2009 Antigonish Highland Games were the only reason you came, how important were the Games in your decision to come to Antigonish

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Timing

25 Did you base the timing of a trip you would normally take to Antigonish County based on when the games were being held?

- Yes
- No

Lengthen

26 Did you lengthen the duration of a trip to Antigonish County in order to attend the Games?

- Yes
- No

Lengthdays

27 By how many days?

Answer: _____

Media

28 In what media have you seen the highland games advertised or mentioned? (select all that apply)

- Radio
- TV
- Newspaper
- Internet
- Porter
- Other _____

Thank you

29 Surveyor Comments:
