



Economic Impact Assessment

Final Report – Touchdown Atlantic – Halifax, NS

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WHAT IS EI?

Economic Impact Assessment (EIA) studies measure the positive change in economic activity resulting from hosting an event in a specific city/town. There are three factors:

1. The spending of out-of-town visitors while they attend the event(s);
2. The expenditures of the event organizers in producing the event(s);
3. Capital construction costs that are directly attributed to hosting the event(s).

An EI study calculates the amount of new money being spent in the host community as a direct result of hosting the event(s), and then the impact these new monies have on the regional, provincial and national economies as a whole.



HOW DO WE MEASURE EI?

Sport Tourism Canada (formerly the Canadian Sport Tourism Alliance) has developed three tools called **STEAM^{2.0}**, **STEAMPRO^{2.0}** and **FESTPRO** to predict, collect, measure and analyze event data across the three primary channels.

STEAM^{2.0} is designed specifically as a predictive model to determine the expected economic impact of hosting a sport event, while **STEAMPRO^{2.0}** is utilized to generate the economic impact from actual spending data during the sport event itself.

STC's latest tool, called **FESTPRO**, is the sister model to **STEAMPRO^{2.0}**. It measures the economic impact of non-sport events like festivals, exhibitions and fairs using actual spending data collected during the event.

Our economic impact services empower event organizers and host cities to accurately assess economic impact resulting from hosting a specific event in a specific location.

RELIABILITY OF THE MODEL

In order to produce economic contribution assessments that are robust and reliable, STC has partnered with the **Canadian Tourism Research Institute (CTRI)** at **The Conference Board of Canada**. The CTRI serves the travel and tourism industry in providing sound economic forecasts and models with timely and insightful interpretation of data specifically relevant to travel.

The findings in this report make use of the most current and detailed input-output tables and multipliers available from Statistics Canada and leverages the credibility and robustness of sector specific tax data available from Statistics Canada's Government Revenues Attributable to Tourism (GRAT) report.



The Conference Board
of Canada



Statistics
Canada



Government Revenues
Attributable to Tourism

MODEL OUTPUTS

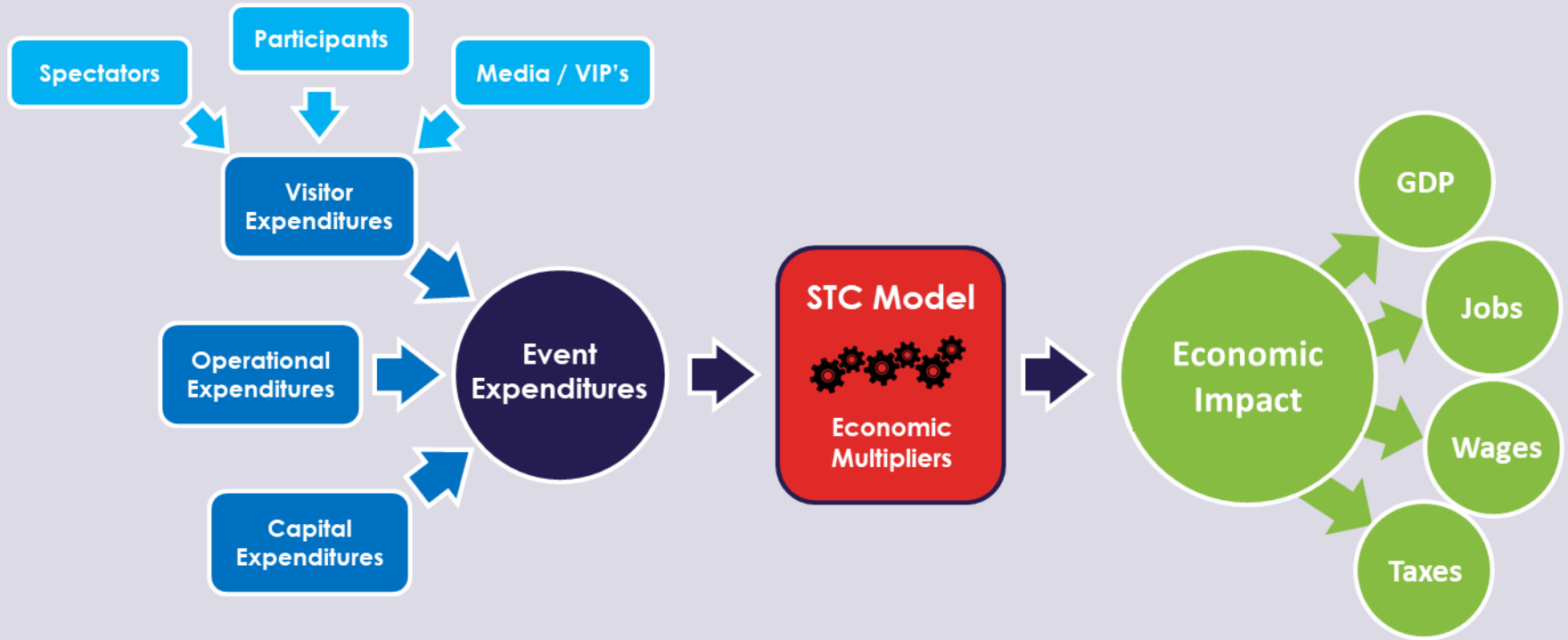
The elements (outputs of the model) used to measure the economic impacts are:

- Gross Domestic Product (GDP)
- Wages & Salaries
- Employment
- Taxes
- Industry Output

STC's **STEAMPRO^{2.0}** measures the direct, indirect & induced effects for each of these elements.



HOW IT WORKS



METHODOLOGY

The visitor statistics cited in this report were derived from an on-site survey that was conducted the day of the event as well as an online version sent to ticket holders and others involved with the event. The survey was developed by STC specifically for this event and was administered through the use of a QR code promoted during the event to allow respondents to complete at their leisure and by an online survey sent to all ticket holders post-event.

A total of **1,513** valid attendee responses were collected during this process along with team spending data obtained.

The survey included a variety of questions for the spectators with regards to their age, place of residence, days attended, event experience, etc., while respondents from out-of-town were asked about their length of stay in the local area, and the amount of money spent in various categories while in the area. Additionally, respondents were asked about their experience while in Halifax for the event along with travel preferences and likelihood of returning to the area in the future.



RELIABILITY OF THE DATA

For this study, The Canadian Football League (CFL) utilized event staff and/or volunteers to promote the QR Code during the event. Surveys were also deployed post-event via email to collect additional spending data from attendees. Sport Tourism Canada was available to provide remote support but was not required.

As a result of not having a member of the STC Economic Impact Team on the ground during the event, STC is not able to validate the data records generated that underpins this analysis.

Based on the overall survey sample of **1,513** valid responses, the margin of error for results contained in this report is calculated at **+/-2.5%** at the 95% confidence level.



THE EVENT

The east coast's biggest celebration of football – Touchdown Atlantic – returned to the region on Saturday, July 29, 2023 as the Toronto Argonauts beat the Saskatchewan Roughriders 31-13.

The 2023 edition of the game was held in Halifax, where Saint Mary's University's Huskies Stadium was expanded to welcome over 10,000 fans in Nova Scotia's second-ever CFL regular-season game.

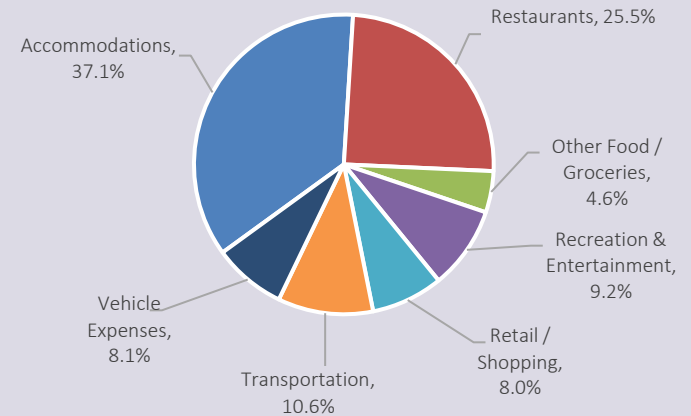
A fun-filled youth football clinic, a special Riderville at TDA experience, and a pre-game tailgate party – complete with live East Coast music and family-friendly fun for all ages – helped to build excitement and anticipation for the big game.



SPECTATOR SPENDING

| | Per Party | Overall |
|----------------------------|-------------------|--------------------|
| Accommodations | \$594.33 | \$1,145,379 |
| Restaurants | \$408.36 | \$923,703 |
| Other Food / Groceries | \$74.36 | \$168,190 |
| Recreation & Entertainment | \$147.81 | \$334,339 |
| Retail / Shopping | \$128.61 | \$290,901 |
| Transportation | \$170.23 | \$385,051 |
| Vehicle Expenses | \$79.04 | \$178,781 |
| Total | \$1,602.73 | \$3,426,343 |

Aggregate spectator spending was just over **\$3.4 million**



AGGREGATE VISITOR SPENDING

Spectator spending was **\$3,426,343**

+

Other visitor* spending was **\$162,526**

+

Team* spending was **\$481,000**

=

Aggregate visitor spending was \$3,588,869

** Other visitors include media, VIP's, volunteers, sponsors, and others. Team spending is what was reported by the Saskatchewan Roughriders Football Club.*

OPERATIONAL & CAPITAL EXPENDITURES

To ensure the successful operation and staging of this event, the combined purchase of **goods and services** by the CFL and the Local Organizing Committee were just under **\$1.9 million**, with another **\$10,600** invested in machinery and equipment as part of the legacy program.

Operational

\$1,868,524

Capital

\$10,600

These operational expenditures include, but are not limited to staff salaries, facility rental, marketing and advertising services, professional services, insurance, facility rental, communication, food and beverage, accommodations, merchandise, transportation, and storage.

THE EI RESULTS

The combined spending of out-of-town spectators, participants, media, VIP's and other people who visited Halifax for Touchdown Atlantic, in combination with the expenditures made by the event organizers, totalled just under \$5.5 million, supporting just over \$7.3 million in overall economic activity in Nova Scotia, including over \$6.8 million of economic activity in the Halifax area.

These expenditures supported \$2.3 million in wages and salaries in the province through the support of 52 jobs, of which 48 jobs and \$2.1 million in wages and salaries were supported locally.

The total net economic activity (GDP) generated by the 2023 Touchdown Atlantic was:

- \$5.1 million for Canada as a whole
- \$3.8 million for the province of Nova Scotia
- \$3.3 for the city of Halifax

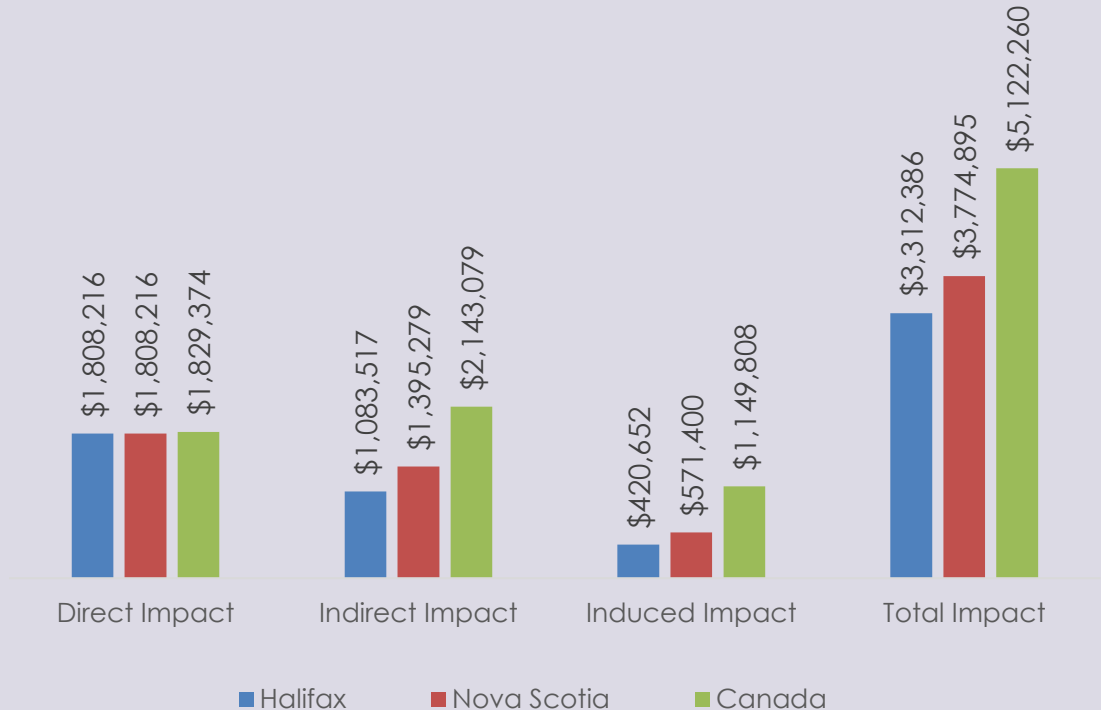
The 2023 Touchdown Atlantic supported tax revenues totaling \$2.3 million across Canada.

| | Halifax | Nova Scotia | Canada |
|------------------------|--------------------|--------------------|---------------------|
| Initial Expenditure | \$5,467,993 | \$5,467,993 | \$5,467,993 |
| GDP | \$3,312,386 | \$3,774,895 | \$5,122,260 |
| Wages & Salaries | \$2,105,430 | \$2,328,358 | \$3,090,884 |
| Employment | 47.8 | 51.7 | 65.3 |
| Total Taxes | \$1,453,677 | \$1,617,243 | \$2,311,698 |
| Federal | \$569,398 | \$631,153 | \$1,005,560 |
| Provincial | \$750,161 | \$867,796 | \$1,145,216 |
| Municipal | \$134,118 | \$118,294 | \$160,921 |
| Industry Output | \$6,824,745 | \$7,301,042 | \$10,008,694 |

GROSS DOMESTIC PRODUCT

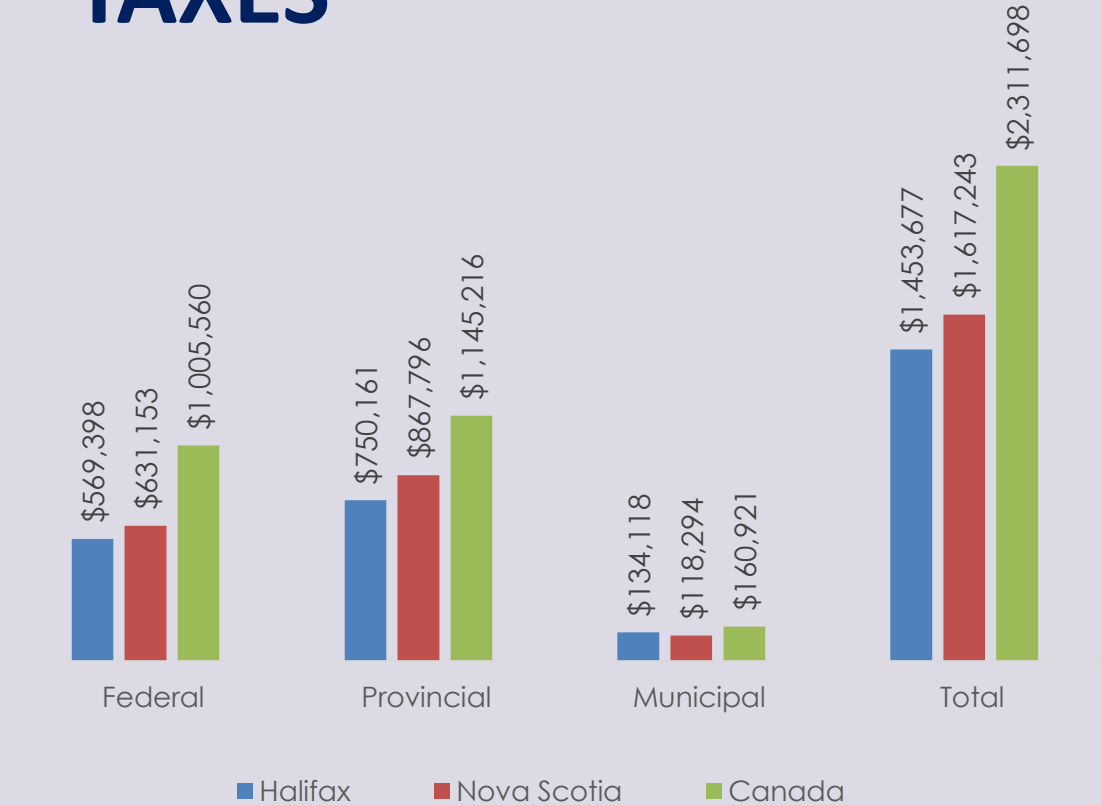
GDP (at basic prices)

The hosting of the **2023 Touchdown Atlantic** in **Halifax** contributed just over **\$5.1 million** in GDP to the Canadian economy through direct and spin-off impacts.



TAXES

The 2023 Touchdown Atlantic hosted in **Halifax** contributed just over **\$2.3 million** in federal, provincial, and local **taxes** through direct and spin-off effects throughout Canada.



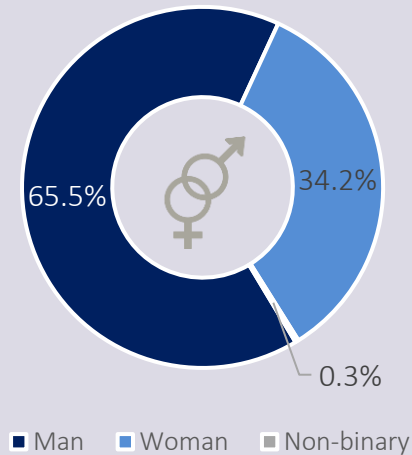
ADDITIONAL QUESTIONS



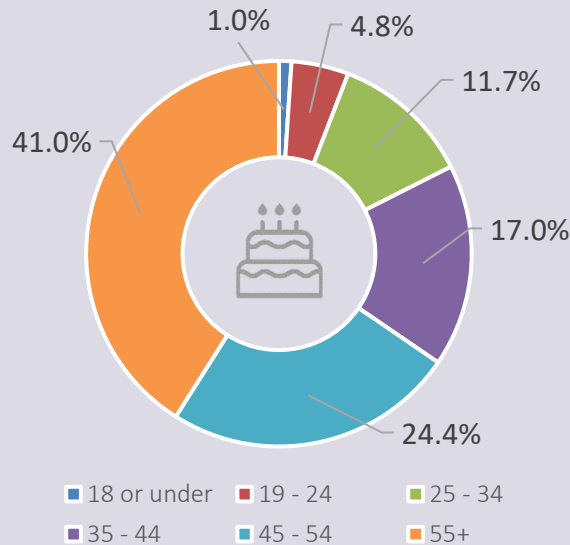
The following pages summarize the results from questions that were included as part of the survey but were not all necessarily required for the economic impact analysis calculations.

DEMOGRAPHICS

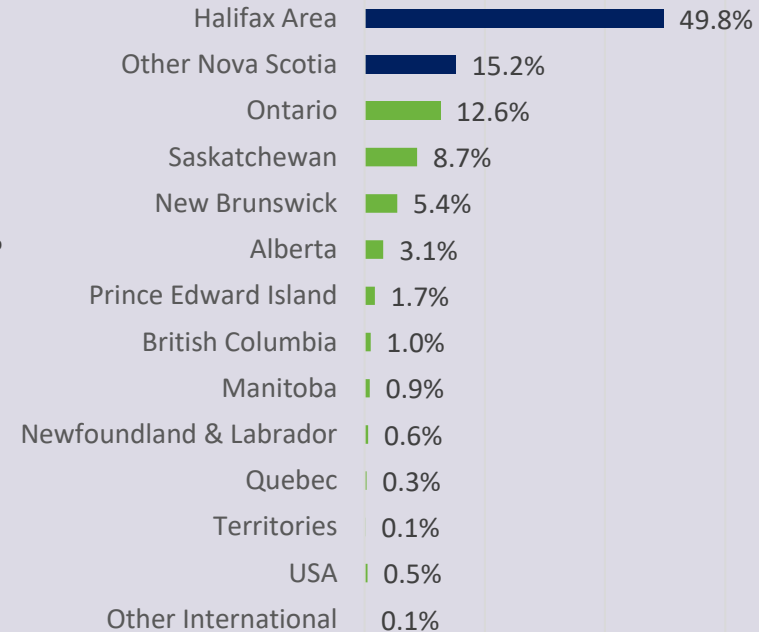
Gender



Age Range



Place of Residence



TRAVEL CHARACTERISTICS

85% of out-of-town attendees stayed overnight during their visit to Halifax



Of those staying overnight...

- **59%** Stayed in a hotel / motel
- **16%** Used a short-term rental
- **18%** Stayed with friends / family
- **7%** Made other arrangements

Average nights in Halifax = **3.2**



Average travel party size = **2.3** people

IMPORTANT

64% of attendees indicated that this event was the sole reason for their visit to Halifax.

Overall, the importance of this event in influencing visitation to Halifax was **9.1/10**.



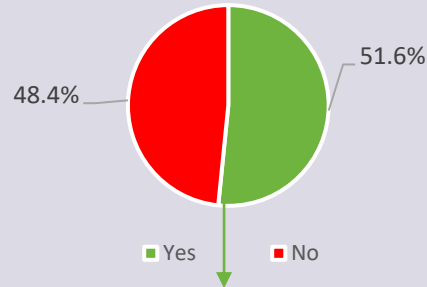
15% of out-of-town attendees made an average of **1** day-trip to Halifax

TOURISM RELATED

First visit to the Halifax area



Using event as a vacation and extending their stay



Days extended

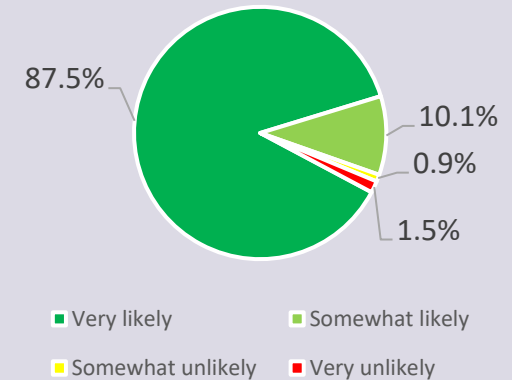
Average days extended = 4.3

37% stayed an extra 1 or 2 days

37% stayed an extra 3-5 days

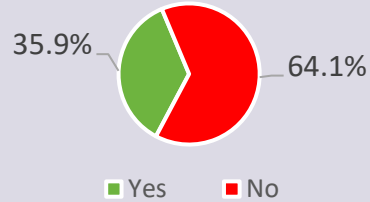
7% stayed 10 or more days

Recommend Halifax as a great place to visit

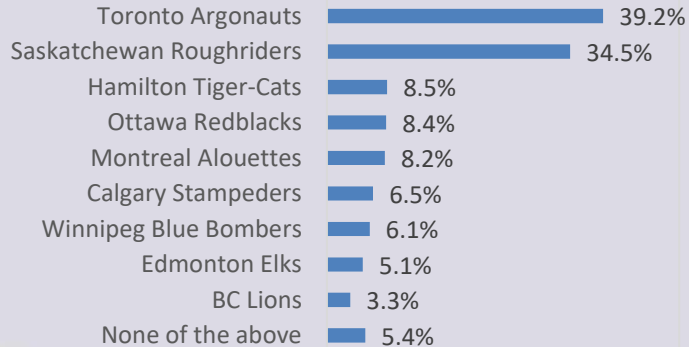


TDA / CFL RELATED

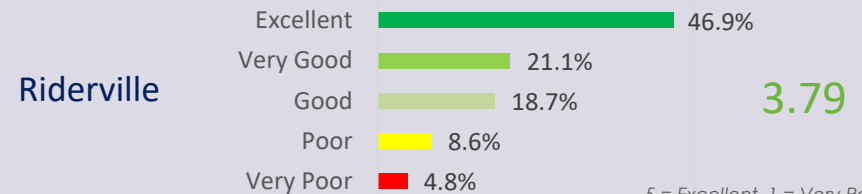
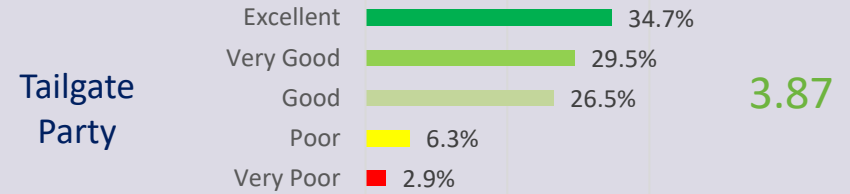
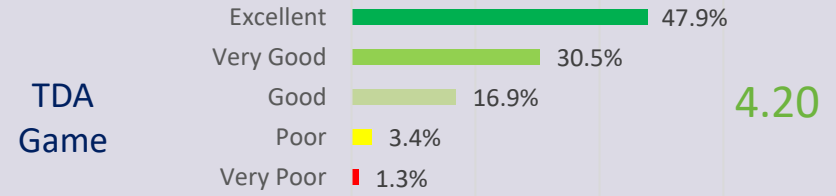
Attended 2022 TDA in Wolfville



Team(s) Supported / Cheer For



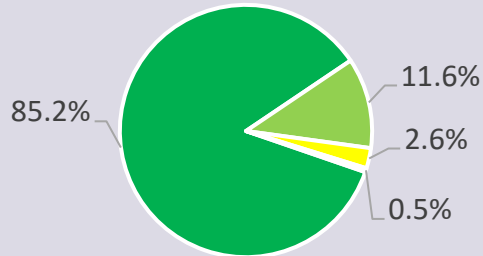
Enjoyment Rating of Events Attended



5 = Excellent, 1 = Very Poor

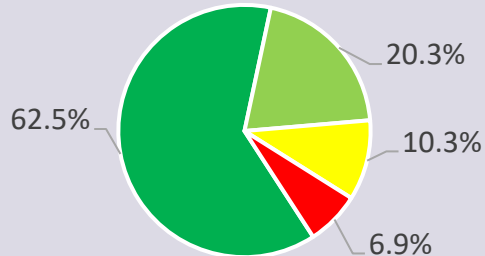
10TH CFL TEAM IN HALIFAX

Support Idea of 10th CFL Franchise in Halifax



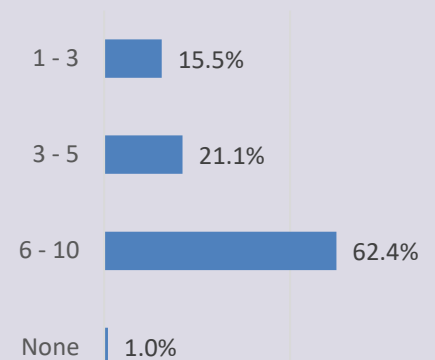
■ Yes, very much ■ Yes, somewhat
■ No, not really ■ No, not at all

Likelihood of Purchasing Season Tickets



■ Very likely ■ Somewhat likely
■ Somewhat unlikely ■ Very unlikely

Games Likely to Attend Annually



Answered only by respondents from Atlantic Canada

SUMMARY | BY THE NUMBERS

2023 Touchdown Atlantic – Key Facts & Figures

| | | | |
|---|--|--|--|
| \$5.5 million of initial expenditures | \$3.6 of visitor spending | 48 local jobs supported by the event | \$7.3 million overall economic activity in the province |
| 5,584 out of town visitors* in Halifax | \$2.1 million of wages and salaries supported locally | \$3.8 million boost to provincial GDP | \$2.3 million in taxes supported across Canada |

* Visitors derived from attendance figures obtained from event organizers combined with results from the survey.

APPENDIX – GLOSSARY OF TERMS

Initial Expenditure - This figure indicates the amount of initial expenditures 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.

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.

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). **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 presented by the aggregate of 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. "Equivalent Full-Year Jobs", if selected, include both part-time and full-time work in ratios consistent with the specific industries.

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.

CONTACT INFORMATION

If you have any questions concerning the findings in this report, please contact:

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If you would like to conduct another EI study using **STEAM**, **STEAMPRO** or **FESTPRO** on any other type of event, please contact research@sporttourismcanada.com

