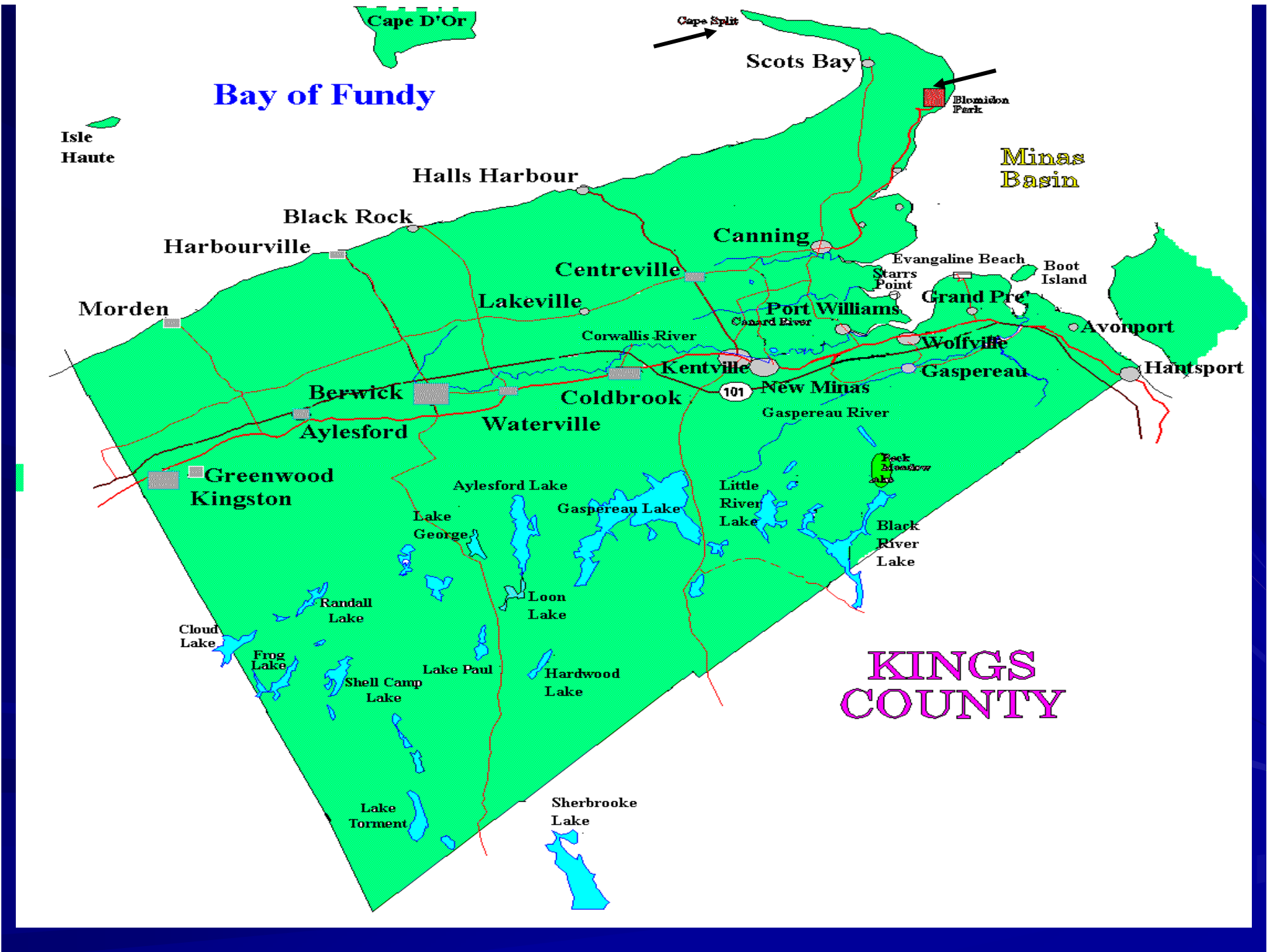


# The Economic Impact of Visitor Hiking in Kings County, Nova Scotia



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Bay of Fundy

Minas Basin

KINGS COUNTY

Cape D'Or

Cape Split

Scots Bay

Blomidon Park

Isle Haute

Halls Harbour

Black Rock

Harbourville

Canning

Centreville

Evangeline Beach

Boot Island

Morden

Lakeville

Port Williams

Grand Pré

Avonport

Corwallis River

Canard River

Wolfville

Hantsport

Kentville

New Minas

Gaspereau

Berwick

Coldbrook

101

Aylesford

Waterville

Gaspereau River

Greenwood  
Kingston

Aylesford Lake

Gaspereau Lake

Little River Lake

Black River Lake

Lake George

Randall Lake

Loon Lake

Cloud Lake

Frog Lake

Lake Paul

Hardwood Lake

Shell Camp Lake

Lake Torment

Sherbrooke Lake

Rock Meadow Lake

# Objective of the Study

The objective of the study is to estimate the economic impact on Kings County, Nova Scotia, created by non-resident hiking on the Cape Split and Blomidon trails.

The economic impact is defined as incremental economic activity generated by non-residents who come to the area to hike on the aforementioned trails.

The impacts are expressed in terms of direct expenditures and direct and indirect income generated within the county economy by these visitors.

# Data

Trail use, user origin and visitor expenditure data was collected and published by Gardner Pinfold Consulting Economists Limited in "*A Survey of Nova Scotia Hiking Trail Users 1999*".

This study was prepared for the Nova Scotia Department of Economic Development and Tourism, the Nova Scotia Sport and Recreation Commission and Human Resources Development Canada.

# Trail Use

Usage of the Cape Split and Blomidon Provincial Park hiking trails was estimated via surveyor counts in the summer and fall.

The sample counts were used to calculate the average daily number of trail users in the summer and fall. July 1 to September 7 (Labour Day) was considered the summer season. September 8 to October 12 (Thanksgiving) was deemed the fall season.

Spring (May and June) usage was assumed to be equal to fall use based on seasonal patterns of Nova Scotia tourism in recent years.

Winter usage was assumed to be zero.

Source: "A Survey of Nova Scotia Hiking Trail Users," Gardner Pinfold Consulting Economists Limited 1999.

# Trail Use Statistics

Trail	Number of Parties	Number of individuals
Cape Split	7,900	15,800
Blomidon Provincial Park	2,000	4,000
Average party Size = 2.0		

Source: "A Survey of Nova Scotia Hiking Trail Users," Gardner Pinfold Consulting Economists Limited 1999.

# Visitor Trail Use

Trail	Number of individuals	Local Users	Non-Nova Scotian Users	Non-Local Nova Scotian Users	Total Visitors Users
Cape Split	15800	3335	5618	6848	12465
Blomidon	4000	844	1422	1733	3155
Totals	19800	4179	7040	8581	15620

Source: "A Survey of Nova Scotia Hiking Trail Users," Gardner Pinfold Consulting Economists Limited 1999.

## Average Spending by Non - Kings County Resident Nova Scotians

Average Party Expenditure Within Study Area		
Category	Cape Split	Blomidon
Operation of private or rental vehicle	\$6.98	\$5.96
Food & Beverages at Restaurants and Bars	\$15.34	\$13.09
Food & Beverages at stores during the trip	\$7.55	\$6.44
Accommodations	\$27.27	\$23.27
Recreation & Entertainment	\$5.11	\$4.36
Clothing, Footwear or other Accessories	\$2.52	\$2.15
Other Expenditures	\$0.97	\$0.83
<b>Total</b>	<b>\$65.97</b>	<b>\$90.55</b>

## Average Spending by Non - Nova Scotians

Average Party Expenditures Within Study Area		
Category	Cape Split	Blomidon
Operation of private or rental vehicle	\$2.60	\$1.65
Food & Beverages at Restaurants and Bars	\$23.40	\$14.82
Food & Beverages at stores during the trip	\$2.80	\$1.77
Accommodations	\$52.00	\$32.93
Recreation & Entertainment	\$1.40	\$0.89
Clothing, Footwear or other Accessories	\$5.70	\$3.61
Other Expenditures	\$0.70	\$0.44
<b>Total</b>	<b>\$65.75</b>	<b>\$56.10</b>

## Spending by Non- Kings County Resident Nova Scotians

Expenditures in Kings County			
Category	Cape Split	Blomidon	Total
Operation of private or rental vehicle	7,304	1,171	8,475
Food & Beverages at Restaurants and Bars	65,736	10,537	76,274
Food & Beverages at stores during the trip	7,866	1,261	9,127
Accommodations	146,080	23,417	169,497
Recreation & Entertainment	3,933	630	4,563
Clothing, Footwear or other Accessories	16,013	2,567	18,579
Other Expenditures	1,966	315	2,282
<b>Total</b>	<b>\$248,899</b>	<b>\$39,898</b>	<b>\$288,797</b>

## Total Spending Non – Nova Scotia Residents

Expenditures in Kings County			
Category	Cape Split	Blomidon	Total
Operation of private or rental vehicle	23,896	5,162	29,057
Food & Beverages at Restaurants and Bars	52,515	11,344	63,859
Food & Beverages at stores during the trip	25,841	5,582	31,423
Accommodations	93,360	20,167	113,527
Recreation & Entertainment	17,505	3,781	21,286
Clothing, Footwear or other Accessories	8,614	1,861	10,474
Other Expenditures	3,334	720	4,055
<b>Total</b>	<b>\$225,064</b>	<b>\$48,616</b>	<b>\$273,680</b>

## Total Spending Non – Kings County Residents

Expenditures in Kings County			
Category	Cape Split	Blomidon	Total
Operation of private or rental vehicle	31,200	6,333	37,532
Food & Beverages at Restaurants and Bars	118,251	21,881	140,132
Food & Beverages at stores during the trip	33,707	6,843	40,549
Accommodations	239,440	43,583	283,024
Recreation & Entertainment	21,438	4,412	25,850
Clothing, Footwear or other Accessories	24,626	4,427	29,054
Other Expenditures	5,301	1,035	6,336
<b>Total</b>	<b>\$473,963</b>	<b>\$88,515</b>	<b>\$562,477</b>

## Total Spending Adjusted for Importance of Trail in Attracting Visitor and GST Leakages

### Expenditures in Kings County

Category	Cape Split	Blomidon	Total
Operation of private or rental vehicle	17,825	3,570	21,395
Food & Beverages at Restaurants and Bars	73,381	13,330	86,711
Food & Beverages at stores during the trip	22,651	4,538	27,189
Accommodations	150,571	26,922	177,492
Recreation & Entertainment	12,082	2,459	14,541
Clothing, Footwear or other Accessories	15,637	2,764	18,401
Other Expenditures	3,139	603	3,742
<b>Total</b>	<b>\$295,286</b>	<b>\$54,185</b>	<b>\$349,471</b>

## Total Spending Adjusted for Importance of Trail in Attracting Visitor and GST Leakages into SIC Industries

Category	SIC Code	Cape Split	Blomidon	Total
Operation of private or rental vehicle	J0000	17,825	3,570	21,395
Food & Beverages at Restaurants/Bars	Q0000	73,381	13,330	86,711
Food & Beverages at stores	J0000	22,651	4,538	27,189
Accommodations	Q0000	150,571	26,922	177,492
Recreation & Entertainment	R0000	12,082	2,459	14,541
Clothing, Footwear/other Accessories	J0000	15,637	2,764	18,401
Other Expenditures	J0000	3,139	603	3,742
<b>Total</b>		<b>\$295,286</b>	<b>\$54,185</b>	<b>\$349,471</b>

## Direct Income Requirements

Industry	Final Demand Change	Direct Income Requirement	Direct Income Change
Wholesale Trade (I000)	6,648	0.155	1,030
Retail Trade (J000)	19,804	0.128	2,535
Accom/Food/Bev (Q000)	264,203	0.276	72,920
Other Services (R000)	14,541	0.341	4,958
<b>Total</b>	<b>\$305,196</b>		<b>\$81,444</b>
<small>Note: Direct Income Requirement Multipliers from VanBlarcom, 2002</small>			

## Total Multiplied Expenditures

Industry	Final Demand Change	Total Expenditure Multiplier	Total Expenditure Change
Wholesale Trade (I000)	6,648	1.389	9,234
Retail Trade (J000)	19,804	1.415	28,023
Accom/Food/Bev (Q000)	264,203	1.416	374, 111
Other Services (R000)	14,541	1.419	20,634
<b>Total</b>	<b>\$305,196</b>		<b>\$432,002</b>
Note: Direct Income Requirement Multipliers from VanBlarcom, 2002			

## Total (Direct/Indirect/Induced) Income Created Via Visitor Hiking Cape Split and Blomidon

Industry	Final Demand Change	Total Income Requirement	Direct Income Change
Wholesale Trade (I000)	6,648	0.236	1,569
Retail Trade (J000)	19,804	0.201	3,981
Accom/Food/Bev (Q000)	264,203	0.459	121,269
Other Services (R000)	14,541	0.498	7,241
<b>Total</b>	<b>\$305,196</b>		<b>\$134,060</b>
Note: Total Income Requirement Multipliers from VanBlarcom, 2003			

# Summary

- An estimated 19,800 hiking visits to Cape Split and Blomidon in 1999
- Approximately 80% of the hikers on each trail were non-Kings County Residents
- Approximately 20% of hikers were local, 45% Nova Scotians outside Kings County and 35% from outside Nova Scotia
- Visitor hikers spent \$562,477 in Kings County (Cape Split hikers \$473,963 and Blomidon hikers \$88,515)
- Based on the importance of the trails in attracting the visitors to the area (1-10 scale selected by survey respondents) \$400,000 (77%) is deemed incremental spending resulting from the trails. After adjustments for tax leakages, retail/wholesale trade margins, final demand change was \$305,000
- Based on a Kings County I/O model, visitor hikers generated \$432,002 in total (direct/indirect/induced) expenditures, \$81,000 in direct income (wages) and \$134,000 in total income across all industries

# Conclusions

- Cape Split and Blomidon are attractions that draw a significant amount of visitors to Kings County
- Spending by the visitor hikers generates additional sales for local businesses
- Re-spending of income derived from visitor hikers creates income across all industries in Kings County
- Being a small area the leakages from the local economy are significant (\$400 thousand in spending was attributed to trails, creating \$432 thousand in local expenditures, \$135 thousand in income)

# Further Research

- Replication and increased efforts regarding visitor counts could increase data reliability and provide up to date statistics on trail use
- Replication of the survey would up-date information regarding drawing power of the trails and expenditures by visitors
- Increasing the number of surveys collected on each trail would increase the confidence levels associated with spending estimates (current data based on slightly less than 100 surveys collected at the two trails)