Market Validation Report for Proposed New Convention Centre
June 2010

Final **Report**

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1.0 Executive Summary

1.1 Background, Purpose, and Methodology

Trade Centre Limited (TCL) commissioned Thinkwell Research to conduct a survey of current and prospective clients about the Halifax World Trade and Convention Centre (WTCC) and the potential new convention centre development in Halifax.

TCL is primarily interested in obtaining information on three overarching themes as they relate to event hosting:

1. Opinions of destination characteristics and facility amenities when deciding on the facility to host an event;
2. Future use and opinions of the existing World Trade and Convention Centre facility; and
3. The likelihood of hosting future events at potential new conference centre development.

In consultation with TCL staff, Thinkwell Research developed the survey instrument. The questionnaire can be seen in Section 5.

The survey was conducted by telephone among a random sample of 317 existing and potential customers.[1] The margin of error for this survey is +/- 4.8%, 19 times out of 20.

The interviews were conducted between May 14 and 28, 2010 by the Market Research Division of IMP Customer Care, from their call centre facility in Windsor, Nova Scotia.

The percentages cited in this report have been rounded to the nearest full point. As a result the percentages listed for some questions may not add up to 100.

The report also analyzes key differences in responses between two business segment categories - lost/cancelled business and non-lost business. The definitions for these segments are:

> **Lost/cancelled business customer** – potential customers who have recently (within the past 3 years) considered using **or** have booked the Halifax World Trade and Convention but then cancelled the booking
>
> **Non-lost business customer** – customers or potential customers who have booked the facility in the past 3 years **or** are identified as a customer that is likely to require a facility rental for various types of events

[1] Respondents who were unable to complete the interview by telephone were provided with the option of completing the survey online. A total of 20 respondents did so.

1.2 Key Findings

- When selecting a facility to host an event, the size of the facility (mean score of 4.5 on a 5-point scale) is a more important factor than facility amenities (4.3), the destination where the facility is located (4.3) and the proximity of the facility to air transport access (3.4).

- Overall, customers rate the appropriate size of space and rooms (4.8) as well as the quality of service (4.8) as the most important facility amenities.

- Customers generally rate the importance of facility amenities higher than the importance of destination characteristics; 5 of the 8 facility amenities have mean scores greater than 4 on the same 5-point scale compared to 2 of the 8 destination characteristics.

- Customers provide generally favourable ratings of Halifax as a destination, with the city receiving mean scores greater than 4 (on a 5-point scale) in 4 of 8 categories.

- Those who have used the WTCC for an event were most likely to be satisfied with the ease of doing business (99%, including 71% who were *very* satisfied). They were least likely to be satisfied with the facility itself (86%, including only 44% who were *very* satisfied).

- The top reason cited for satisfaction with the facility is the WTCC staff. The top reason for dissatisfaction is the age and appearance of the facility.

- Eight in ten (80%) customers are likely to host future events at the proposed new convention centre in Halifax. All business segments provide a high likelihood of hosting future events at this new potential facility, including 88% of corporate event-planners, 86% of local/provincial/regional customers, and 75% of the national/international segment.

2.0 Detailed Findings

2.1 Respondent Profile

The majority (79%) of respondents (customers) are from the non-lost business category while the remaining 21% are lost/cancelled business customers.

Customers are also identified under three geographical categories: local/provincial/regional (52%), national/international (46%) and corporate event planners (3%, or 8 respondents).

Of the 8 corporate event planners, 4 identified having between 1 and 10 clients who would consider hosting an event at a convention and conference centre in Halifax, Nova Scotia; 1 respondent estimated they have 25 clients willing to do so, 1 reported 150 clients – **in all, representing 189 clients**. The remaining two corporate-event planners were unsure.

Corporate event planners also identified many different sectors that their clients are currently in. Almost all (7 of 8) say they have clients in the financial, banking and insurance sectors while 5 say they have clients in the public sector and 4 have clients in either the telecommunications or information and technology sectors. For a full listing of sectors, see Table 1.

Table 1: Sectors of corporate event planner clients (n=8)

Sectors	n=8
Financials, banking, insurance	88% (7)
Public sector	62% (5)
Telecommunications	50% (4)
Information and technology	50% (4)
Oil and gas	38% (3)
Real estate	25% (2)
Mining and metals	25% (2)
Agriculture	12% (1)
Manufacturing	12% (1)

2.2 Types of Events and Meeting Space

Customers provide varying levels of expectations for hosting events in the next 12 months. Generally, corporate-event planners express a higher likelihood of hosting the various types of events over the next year than the national/international segment, followed by the local/provincial/regional customers.

Table 2: Types of events to be hosted in the next 12 months by business segment

Types of events	Total	Local/Prov/Reg	Nat/Int	Corporate
Meeting space requiring a facility rental	**80%**	77%	83%	88%
Convention or conference	**60%**	46%	72%	100%
Food and beverage event	**58%**	58%	57%	75%
Trade Show	**27%**	20%	35%	38%
Consumer show	**3%**	3%	4%	0%

2.2.1 A meeting space requiring a facility rental

Eight in ten (80%) customers say they expect to require a facility rental for a meeting space within the next 12 months; likelihood is high among all segments (local/provincial/regional - 77%, national/international - 83%, corporate-event planners - 88%).

The average number of meetings requiring a facility rental is 8.7 with a median of 60 expected attendees. The local/provincial/regional customers expect fewer attendees (median of 49.5) than the national/ international segment (100) and corporate-event planners (500).

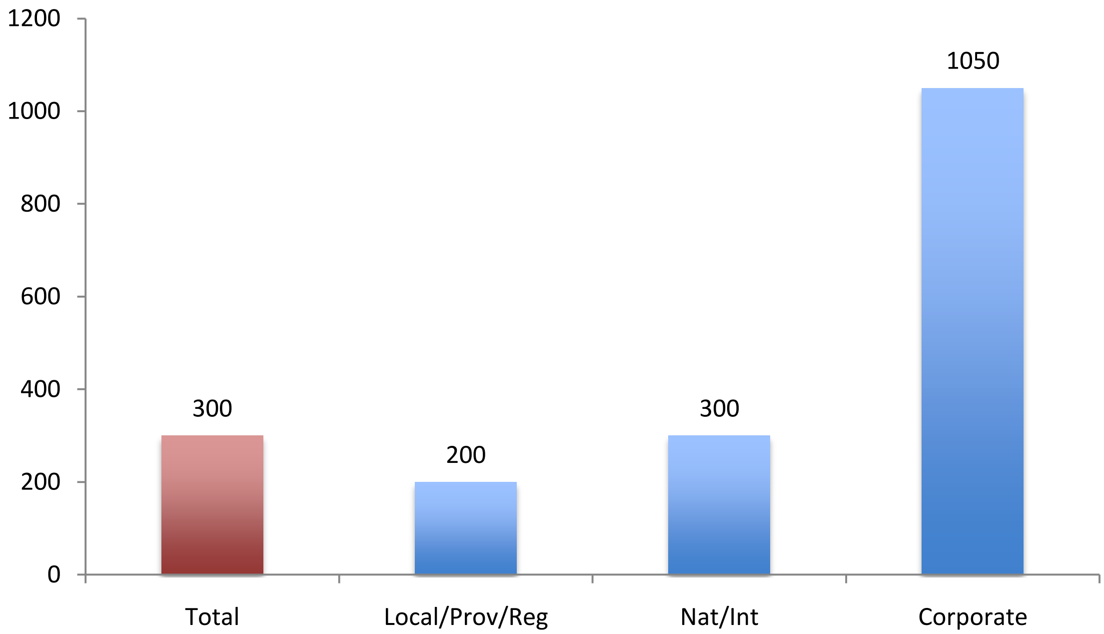
2.2.2 Convention or conference

The majority of customers (60%) say they will host a convention or conference in the next 12 months.

Of this group, one-half (50%) say it will be just 1 conference or convention. Another 22% say they will host 2, 14% say between 3 and 5 and 14% say more than 5. Half of those in the corporate category (4 respondents) say they will be hosting or organizing more than 10 conventions or conferences within the next year.

These customers provide a wide range of expected attendees for their largest event, with the median being 300 attendees. The business segments are a good predictor for the number of expected attendees. Those in the local/provincial/regional segment (median of 200) expect a smaller number of attendees than national/international (300) and corporate (1050) customers (see Figure 1).

Figure 1: Median convention or conference attendees by business segment (n=189)



2.2.3 Food and beverage event

Almost six in ten (58%) customers say they plan to host a food and beverage event in the next year with the corporate-event planners (75%) indicating a higher likelihood than the local/provincial/regional (58%) customers and the national/international customers (57%).

Among this group, the average number of expected events in the next 12 months is 7.1 with a median of 250 expected attendees. The local/provincial/regional segment (median of 250) and the national/international customers (250) expect fewer attendees for food and beverage events than the corporate-event planners (500).

2.2.4 Trade show

More than one-quarter (27%) of customers say they will host a trade show in the next 12 months with the local/provincial/regional (20%) segment being less likely than the national/international (35%) segment and corporate-event planners (38%).

Similar to conventions and conferences, the majority (67%) of those expecting to do so say they will only host 1 trade show in the next year with the average number of shows being 1.7. The median number of expected attendees is 550.

Also similar to conventions and conferences, business segments are a strong predictor of expected attendance: the median for the local/provincial/regional customers is 350 attendees compared to 800 for corporate-event planners and 950 for the national/ international customers.

2.2.5 Consumer shows and other events

Of the 3% of customers (n=10) who plan to host a consumer show, 70% plan to host 1 show in the next 12 months. The remaining 30% are planning between 4 and 8 shows. The median number of expected attendees is 3,000.

Most customers (77%) say there is no other type of event they will be hosting in the next 12 months, but a few cite event types such as a social event/dinner/party (3%), educational training event (3%), board/committee/business meeting (3%), or a conference/forum/reception (3%). For a full list, see Table 2.

Table 3: Types of events to be hosted in the next 12 months

Other types of events[2]	
No other events	77%
Social events/dinners/parties	3%
Education/training	3%
Board/committee/business meetings	3%
Conference/forums/receptions	3%
Fundraising/charity/events	2%
Golf tournaments/other sports related events	2%
Workshops/seminars	2%
Don’t know	3%
Other	5%

[2] After being asked about the specific types of events, customers were also asked if there were any other type of event they plan to host in the next 12 months.

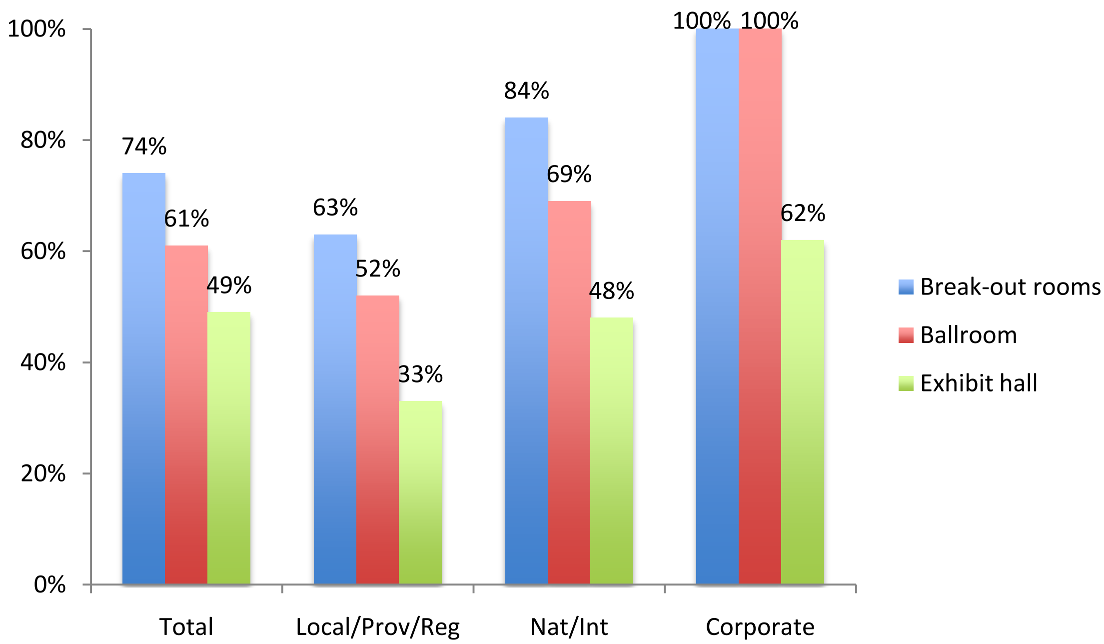
2.2.6 Meeting space requirements

Almost three-quarters (74%) of customers require break-out rooms for their events, more than six in ten customers (61%) require a ballroom, and four in ten (40%) require an exhibit hall.

As shown in Figure 2, national/international and corporate customers are more likely than local/provincial/regional customers to require each of these facilities.

Most (80%) of those requiring an exhibit hall say they expect 100 or less exhibitors; 18% say between 101 and 1000 exhibitors and 1% say between 1001 and 2000.

Figure 2: Meeting room space requirements by business segments



2.3 Facility Booking Considerations

When considering the factors that are important when selecting a facility, customers are most likely to rate size as the most important (4.5 average on a 5-point scale, where 1 is not at all important and 5 is very important). More than two-thirds (68%) rate the importance of size a "5" on this scale.

The destination where the facility is located (4.3, with and 50% rating it a "5") and facility amenities (4.3, with 45% rating them a "5") are the next most important considerations.

Compared to the other factors, the facility location relative to air transportation access is not as important to customers (3.4, with only 26% rating it a 5).

The overall results – and the average by business segment – are displayed in Table 3.

Table 4: Importance of factors by segments (mean score on 5-point scale)

Factors	Total	Local/Prov/Reg	Nat/Int	Corporate
Facility size	4.5	4.5	4.4	4.9
Facility amenities	4.3	4.4	4.1	4.4
Destination where facility is located	4.3	4.3	4.2	4.4
Facility location relative to air transportation access	3.4	2.9	4.0	4.2

2.4 Facility Amenities

Customers were also asked to rate several different facility amenities on the same 5-point scale (where 1 is not at all important and 5 is very important).

Table 5: Facility amenities by business segment (mean score on 5-point scale)

Amenities	Total	Local/Prov/Reg	Nat/Int	Corporate
Appropriate size of space/rooms for event	4.8	4.8	4.8	4.9
Quality of service	4.8	4.9	4.8	4.6
Quality of food	4.6	4.7	4.6	4.8
Facility technology	4.3	4.3	4.3	4.5
General perception of the facility	4.1	4.2	4.1	4.2
Moving materials in and out of facility	3.8	3.9	3.7	4.1
Adjoining hotel	3.7	3.4	4.1	4.2
Availability of parking	3.7	4.2	3.1	3.6

Overall, customers rate the appropriate size of space and rooms (4.8) as well as the quality of service (4.8) as the most important facility amenities, followed by quality of food (4.6), facility technology (4.3) and the general perception of the facility (4.1). Moving materials in and out of the facility (3.8), an adjoining hotel (3.7) and the availability of parking (3.7) received average scores of less than 4.

While most amenities received approximately the same rating within the various business segments, there are a few notable differences. While the availability of parking received a mean score 4.2 of among the local/provincial/regional segment, it was rated 3.6 by the corporate-event planners and only 3.1 by the national/international segment. Also of note, the local/provincial/regional segment rated an adjoining hotel (3.4) lower than the national/international segment (4.1) and corporate-event planners (4.2).

The majority (69%) of customers say they would require an adjoining hotel to have a star-rating of 4 or higher. Another 27% require the hotel to have a rating of between 3 and 4.

2.5 Destination Characteristics

2.5.1 Importance of destination characteristics

Using the same scale as in the two previous sections, customers were also asked to rate the importance of various destination characteristics. As a general rule, they rate destination characteristics lower in importance than facility amenities: only 2 of the 8 destination characteristics have mean scores greater than 4, compared to 5 of the 8 facility amenity characteristics.

Table 6: Destination characteristics by business segment (mean score on 5-point scale)

Characteristics	Total	Local/Prov/Reg	Nat/Int	Corporate
Availability of accommodations close to the facility	4.2	3.9	4.5	4.8
General perception of the destination	4.0	4.0	4.0	4.0
Proximity of facility to downtown centre/core	3.8	3.9	3.8	4.1
Facility proximity to air transport access	3.5	3.0	3.9	4.4
Hospitality of local citizenry	3.5	3.5	3.6	3.6
Local entertainment opportunities	3.1	3.1	3.1	3.6
The local climate/seasonality	3.1	2.9	3.3	3.5
Arts/cultural/historical opportunities	3.0	2.9	3.0	3.1

The availability of accommodations close to the facility (4.2) and the general perception of the facility (4.0) are, on average, the most important characteristics for customers, followed by the proximity of the facility to the downtown centre (3.8).

Corporate-event planners (4.8) and those in the national/international segment (4.5) place more importance on the availability of accommodations than local/provincial/regional customers (3.9). The same is true for proximity to air transportation (corporate - 4.4, national/international - 3.9, local/provincial/regional - 3.0).

2.5.2 Halifax as a destination

Using the same categories, customers rate Halifax favourably as a destination, with 4 of the 8 characteristics receiving mean scores greater than 4 on a 5-point scale (where 1 is very poor and 5 is very good). Table 6 shows the mean scores among the business segments for each characteristic as it relates to Halifax, and also displays the mean scores from Table 5 for a comparative analysis.

Table 7: Characteristics as they relate to Halifax by business segment (mean score 5-point scale) versus general importance of destination characteristics

Characteristics	Total		Local/Prov/ Reg		Nat/Int		Corporate	
	Gen	**Hal**	Gen	**Hal**	Gen	**Hal**	Gen	**Hal**
Availability of accommodations close to the facility	4.2	**4.2**	3.9	**4.1**	4.5	**4.2**	4.8	**4.0**
General perception of the destination	4.0	**4.3**	4.0	**4.2**	4.0	**4.3**	4.0	**4.5**
Proximity of facility to downtown centre/core	3.8	**4.2**	3.9	**4.3**	3.8	**4.1**	4.1	**4.7**
Facility proximity to air transport access	3.5	**3.5**	3.0	**3.4**	3.9	**3.5**	4.4	**4.3**
Hospitality of local citizenry	3.5	**4.1**	3.5	**4.1**	3.6	**4.1**	3.6	**4.5**
Local entertainment opportunities	3.1	**3.8**	3.1	**3.8**	3.1	**3.7**	3.6	**4.3**
The local climate/seasonality	3.1	**3.5**	2.9	**3.4**	3.3	**3.6**	3.5	**3.6**
Arts/cultural/historical opportunities	3.0	**3.7**	2.9	**3.7**	3.0	**3.8**	3.1	**4.0**

The general perception of Halifax (4.3), the availability of accommodations close to the facility (4.2) and the proximity of the facility to the downtown centre (4.2) are the highest rated characteristics to Halifax followed by the hospitality of local citizens (4.1).

Corporate event-planners generally rate Halifax more favourably than the local/provincial/regional and national/international segments; corporate event-planners rate 7 of the 8 characteristics for Halifax at a mean score of 4 or higher compared to just 4 of 8 for the other two segments.

Overall, in no instance does Halifax score lower on the 5-point scale used for these questions than the perceived importance of that characteristic. However, corporate and national/international customers assign higher importance scores than they award to Halifax for the availability of accommodations close to the facility and the proximity of the facility to air transportation.

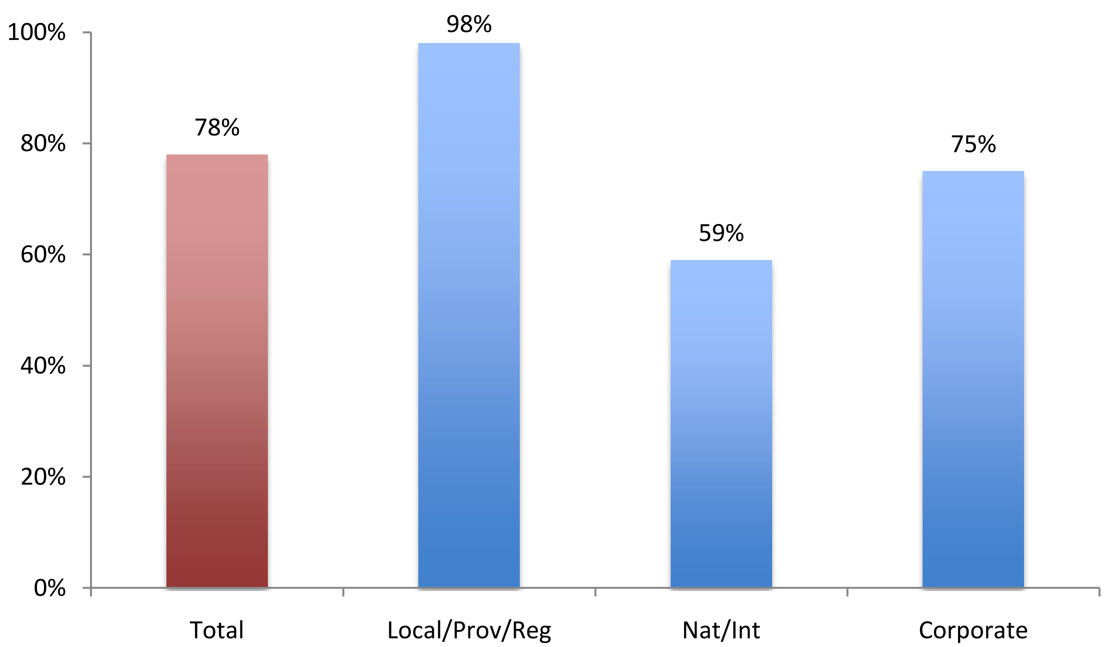
2.6 Halifax World Trade and Convention Centre

2.6.1 Awareness and use

The majority (78%) of those who are classified as non-lost business are aware of the WTCC compared to just 22% who say they are not.[3] Not surprisingly, those in the local/provincial/regional business segment (98%) are much more likely than the corporate-event planners (75%) and the national/international customers (59%) to be aware of the facility.

Among those customers who are aware of the facility, most (72%) have hosted an event at the WTCC with 83% of the corporate-event planners indicating prior usage compared to 78% among the local/provincial/regional customers and 62% among the national/international segment.

Figure 3: Awareness of WTCC



[3] Lost/cancelled business respondents were not asked this question. Having considered using the WTCC in the recent past, it is assumed that they are aware of the facility.

2.6.2 Experience with hosting event at WTCC

Among the customers have who previously used the WTCC, the vast majority were either very satisfied or somewhat satisfied with the various aspects of their experience. Almost all were satisfied with the ease of doing business (99%), with Halifax as a destination (97%), service (96%), and the overall experience (96%). Furthermore, at least seven in ten customers indicate they were *very* satisfied in these areas.

Table 8: Satisfaction with hosting an event at WTCC

Satisfaction	Very	Somewhat	Total
Ease of doing business	71%	28%	99%
Halifax as a destination	86%	11%	97%
Service	74%	22%	96%
Overall experience	70%	26%	96%
Value for money paid	50%	43%	93%
Facility	44%	42%	86%

Clear majorities of customers were also satisfied with the value for money paid and with the facility itself. However, the intensity of this satisfaction is far lower than in other areas. Only 50% said they were *very* satisfied with the value for money paid, and even fewer (44%) said they were *very* satisfied with the facility.

Among those who say they were either somewhat or very satisfied with the facility, one-quarter (25%) say they were satisfied because of the staff and another 20% say it was because their needs and expectations were met. Another 12% cite either the good location or a generally good experience.

A number of "somewhat satisfied" customers also provided negative responses in this section of the survey. The most notable of these were a view that the facility is old and dated (10%) and too small (10%).

Among those who say they were either dissatisfied or very dissatisfied with the facility, over three in ten (31%) say it is because the facility is old and dated. Nearly three in ten (27%) say the ceilings are too low and pillars are in the way (27%) or experienced audio/visual problems (27%). A complete list is provided in Table 8.

Table 9: Reasons for dissatisfaction (very or somewhat) with WTCC (n=26)

Reasons	
Facility old/date/plain/not clean looking	31%
Ceilings too low/pillars in the way	27%
Audio visual issues/problems	27%
Prefer bigger facility/facility too small	23%
Rooms too small/not a good layout	23%
Rooms dark/outdated décor	12%
Rooms too far apart/difficult to get around	12%

2.6.3 Perceptions of WTCC facility

Among those who have not used the facility before, more than nine in ten say they perceived Halifax to be an excellent (60%) or good (32%) destination. This compares to less than seven in ten who have the same perceptions of service at the facility (31% excellent; 38% good) or the facility itself (19% excellent; 47% good).

2.6.4 Hosting future events at WTCC

Of those aware of the WTCC, most (86%) say they will consider hosting future events at the facility. The local/provincial/regional (90%) customers are more likely to say they will consider hosting future events at the WTCC than those in the national/international segment (77%), a finding that mirrors previous use of the facility.

Among those who have used the facility in the past[4], many of the unprompted top-of-mind suggestions for improvement are structural in nature (see Table 9). This includes the two most popular suggestions - larger rooms and more space (22%) and a better layout, higher ceilings and no pillars (17%).

Table 10: Suggested improvements to facility

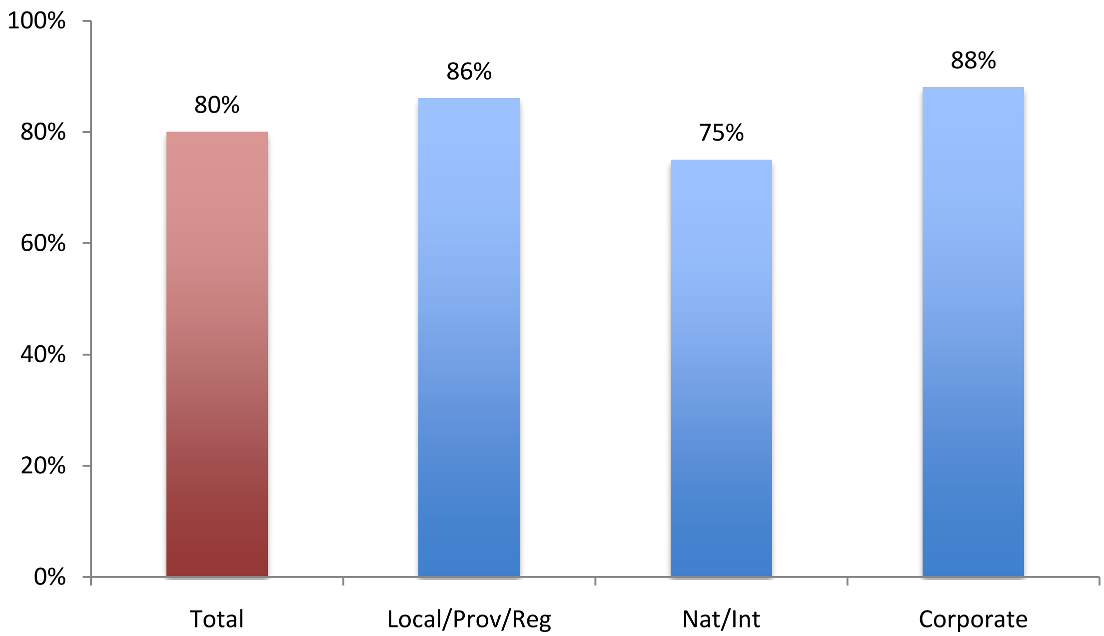
Improvements	
Larger rooms/more rooms/more space	**22%**
Better layout/higher ceilings/no pillars in rooms	**17%**
Better access to parking	16%
Better technology/better AV service	8%
Renovate/update décor	8%
Build new facility/larger facility	**6%**
Lower/competitive price	6%
Larger exhibit/trade show area	**5%**

[4] The percentages in this section refer only to non-lost business customers who have used the facility.

2.6.5 Hosting future events at potential new convention centre

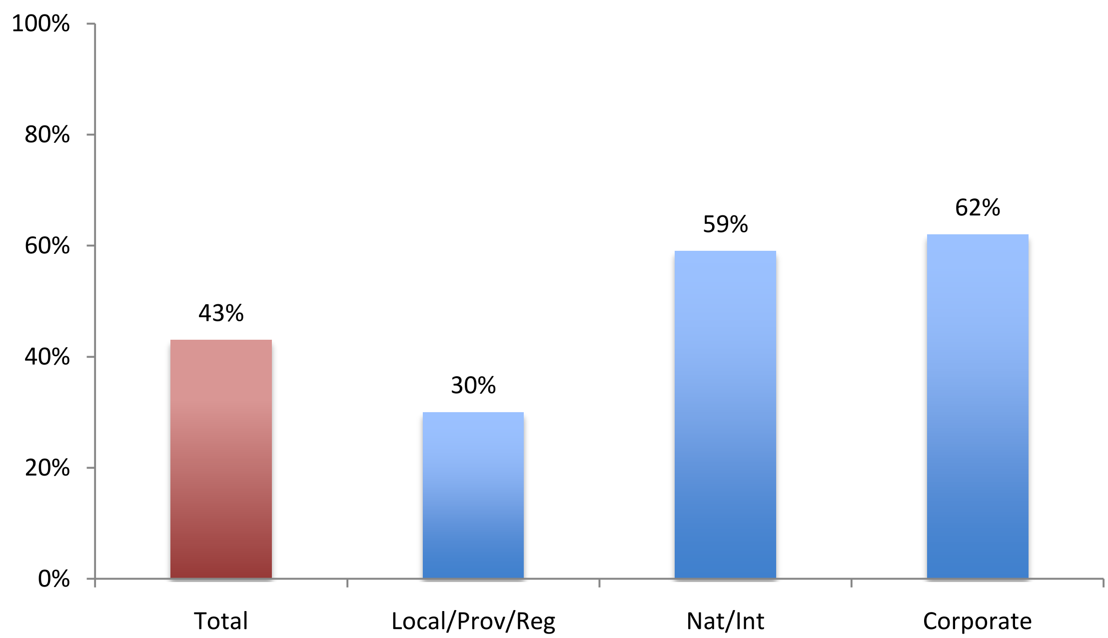
If there was a new facility in Halifax with approximately 120,000 square feet of flexible meeting and exhibit space, most customers are either *very* (41%) or *somewhat likely* (39%) to host future events at this new facility. All business segments provide a high likelihood of hosting future events at this new potential facility, including 88% of corporate event-planners, 86% of local/provincial/regional customers, and 75% of the national/international segment.

Figure 4: Likelihood of hosting events at potential new Halifax facility (by business segment)



Less than half of customers say they are either *very likely* (12%) or *somewhat likely* (32%) to host future events at new or improved facilities in Atlantic Canada, outside of Halifax; conversely more than half say they are either *somewhat unlikely* (23%) or *very unlikely* (31%). Those in the local/provincial/regional segment (30%) are less likely to do so than those in the national/international segment (59%) or corporate event-planners (62%).

Figure 5: Likelihood of hosting events at new or improve facilities in Atlantic Canada, outside of Halifax (by business segment)



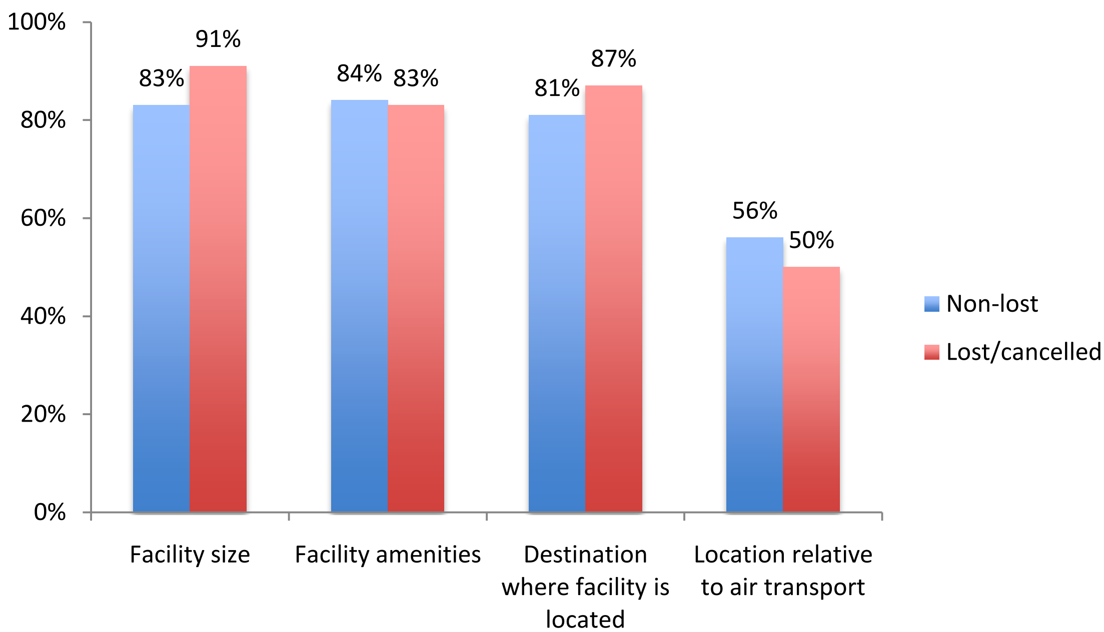
2.7 Lost/Cancelled Business and Non-lost Business

This section outlines the key differences of note between those classified as "lost/ cancelled business" customers and "non-lost business" customers.

2.7.1 Facility amenities

The lost/cancelled business segment places a higher importance on some of the factors considered when deciding where to host an event. Over nine in ten (91%) lost/cancelled business customers rate the importance of facility size as either a 4 or 5 compared on a 5-point scale compared to 83% of those in the non-lost business segment. Lost/cancelled business customers are also slightly more likely to assign 4 or 5 ratings to the importance of the destination where the facility is located (87% versus 81%).

Figure 4: Importance of factors by segments (4 or 5 on 5-point scale)



2.7.2 Use and satisfaction with WTCC facility

Although those in the lost/cancelled business segment have previously considered using the facility and recently declined, about half (51%) have used the facility in the past to host an event. Both segments report similar levels of satisfaction with their experience. One notable difference is that fewer lost/cancelled business customers were satisfied (77% *very or somewhat)* with the facility compared to non-lost business customers (89%) – see Table 10.

Table 11: Satisfaction with hosting event at WTCC (Lost/cancelled vs. Non-lost)

Satisfaction (Very or somewhat)	Total	Non-Lost	Lost/cancelled
Ease of doing business	99%	99%	97%
Halifax as a destination	97%	97%	100%
Service	96%	96%	97%
Overall experience	96%	96%	94%
Value for money paid	93%	93%	97%
Facility	86%	**89%**	**77%**

Among those who have not used the facility before, there are differences among the non-lost and lost/cancelled business segments in the degree to which they perceive the facility and Halifax as a destination: seven in ten (70%) lost/cancelled business customers say they perceive Halifax to be an *excellent* destination compared to 51% of the non-lost business segment, and only 12% of the lost/cancelled business customers say they perceive the facility to be *excellent* compared to 26% of the non-lost business customers.

Lost/cancelled business customers provide varied reasons as to why they chose to not use the WTCC facility for an event with more than one-third providing reasons related to the facility; the facility's size (22%) or other aspects of the facility (14%) were not suitable.

2.7.3 Hosting future events at potential new convention centre

Lost/cancelled business customers are more likely to say that they would host future events at a new facility in Halifax with approximately 120,000 square feet of flexible meeting and exhibit space (87% say very or somewhat likely) compared to the non-lost business segment (79%).

3.0 Methodology

3.1 Survey design

The questionnaire was designed by Thinkwell Research in consultation with Trade Centre Limited (TCL).

3.2 Sample Design and Selection

The sample for this study was provided by TCL. The sample consisted of a database of "lost/cancelled" and "non-lost" customers, and was further classified by region (local/regional versus national/international) and corporate event planners.

3.3 Survey Administration

The survey was conducted between May 14th and May 28th, 2010. IMP Customer Care - Market Research Division conducted the survey from their call centre facility in Windsor, Nova Scotia. All telephone interviewing was conducted by fully trained (Marketing Research Association Professional Interviewer Training Program) and supervised interviewers. At a minimum, 5 percent of calls were validated randomly through telephone and visual monitoring with at least 75% of each interview monitored.

Respondents who were unable to complete the interview by telephone were provided with the option of completing the survey online. A total of 20 respondents did so.

3.4 Completion results

The rate of response for the survey was 36 percent. The response rate is calculated as the number of cooperative contacts (425) divided by the total number of eligible numbers attempted (1,195). The final disposition of all telephone numbers called is shown below in accordance with the Marketing Intelligence and Research Association's *Empirical Method of Response Rate Calculation Formula*.

Total Attempted	**1355**
Total Ineligible	**180**
Total Eligible	**1195**
Busy	1
Answering machine	104
No answer	0
Language barrier	4
Ill/Incapable	0
Eligible not available/Callback	469
Total Asked	**617**
Household/Company Refusal	19
Respondent Refusal	171
Qualified Termination	2
Co-operative Contact	**425**
Not Qualified	108
Completed Interview	317
REFUSAL RATE	**31%**
RESPONSE RATE	**36%**

3.5 Sampling Error

As with any quantitative study, the data reported in this research are subject to ***sampling error,*** which can be defined as the likely range of difference between the reported results and the results that would have been obtained had we been able to interview *everyone* in the relevant population. Sampling error decreases as the size of the sample increases and as the percentage giving a particular answer moves toward unanimity.

At the 95% confidence level, “worst-case” potential *sampling error* for a sample of 317 in a population of 1,404 is ±4.8 percentage points.

4.0 About Thinkwell Research

Thinkwell Research is a Halifax, Nova Scotia based market and public opinion research firm.

Thinkwell has conducted a large number of research projects for clients in a wide range of sectors including government, post secondary education, personal finance, telecommunications, energy, retail, natural resources, agriculture, personal fitness, and information technology. In the process, Thinkwell has conducted customer and employee satisfaction surveys, market feasibility studies, public policy and political surveys, literature reviews (secondary research) and brand positioning research.

Thinkwell Research is proud to be the Atlantic Canadian member of the **Nanos Research Group**. Nanos Research (formerly SES) is one of North American's premier marketing and public opinion research firms. The Nanos Research Group is a national team of like-minded research professionals and organizations bound by a common commitment to quality research and services as well as superior research outcomes.

Thinkwell's membership in this group allows our clients to access a network of marketing research companies throughout Canada. In addition, Thinkwell has access to a broad network of research professionals who can serve in a consulting capacity on projects conducted by Thinkwell in Atlantic Canadian markets.

Thinkwell has successfully completed the Market Research Intelligence Association (MRIA) **Gold Seal** certification. MRIA's Gold Seal Certification involves a monitored self-assessment process – working with an independent, third party Reviewer – based on the certification process of the former Canadian Association of Market Research Organizations. Gold Seal Certification is one of MRIA's primary mechanisms for developing and delivering world-class professional standards and ensuring member compliance.

Confidentiality

As with any public opinion research project, confidentiality is of the utmost importance.

Thinkwell Research has established high standards for the safeguarding of personal information based on the ten principles set out in the Canadian Personal Information Protection and Electronic Documents Act (PIPEDA). For more information on our privacy policy, please visit http://www.thinkwellresearch.ca/privacy.html.

Len Preeper, President and Founder

Len Preeper is the owner and President of Thinkwell Research. He began working in the public opinion and market research industry in 1995 with Corporate Research Associates. In 1996 he joined the Nova Scotia government where he served in a variety of research and policy advisory roles before co-founding OpinionTrac Research in the fall of 2000. He founded Thinkwell Research in August of 2003.

During his research career Len has conducted a number of research projects for government departments and private sector clients, including Sobeys, Irving Oil, Aliant Telecom, Emera/Nova Scotia Power, National Sea, the Nova Scotia Department of Energy, the Nova Scotia Department of Justice, the Nova Scotia Department of Transportation & Public Works, the Nova Scotia Gaming Corporation, Nova Scotia Health Promotion, the Canadian Cancer Society, Smoke Free Nova Scotia, the Coady International Institute, the GrowthWorks Atlantic Venture Fund, the Canadian Petroleum Products Institute, Dalhousie University, Mount Saint Vincent University, Tourism PEI, ACOA and the CBC. He has managed three large scale syndicated research projects - the CRA Atlantic Omnibus Survey, the OpinionTrac Quarterly Review, and the Nextbus Survey.

Len is a Professional Member of the Marketing Research and Intelligence Association (MRIA), a Canadian not-for-profit association representing all aspects of the market intelligence and survey research industry. He has also been employed as a part-time professor of political science at Acadia University. He has taught an introductory level class in political science and a third-year undergraduate course in public opinion and polling.

Len has a Bachelor of Arts (Honours) degree in Political Science from Acadia University and a Master of Arts degree in Political Studies from Queen's University.

5.0 Questionnaire

QA Given that we will be asking questions about Halifax, Nova Scotia as a destination for event hosting, could you please indicate whether you would ever consider hosting an event in Halifax, Nova Scotia in the future?

1 Yes
2 No [Ask why (QA1), and then THANK AND TERMINATE]
VOLUNTEERED
9 Don't know

QB **[IF CORPORATE]** How many clients do you currently represent who would be willing to host an event at a convention and conference centre in Halifax, Nova Scotia?

RECORD VERBATIM

QC **[IF CORPORATE]** What sectors are your current clients in?

01 Telecommunications
02 Information and Technology
03 Oil and Gas
04 Public sector
05 Agriculture
06 Mining and metals
07 Real Estate
08 Financials, Banking, and Insurance
09 Manufacturing
88 Other: specify______________
VOLUNTEERED
99 Don't know

I would like to begin by asking you about the various types of events you plan to host in a conference or convention centre within the next year

Q1. Within the next 12 months do you plan on hosting a…?

a1. Convention or conference

1 Yes
2 No
VOLUNTEERED
9 Don't know

a2. [IF Q1a1=YES] How many conventions and conferences do you plan on hosting (OR IF CORPORATE use organizing]
RECORD NUMBER VERBATIM

a3. [IF Q1a1=YES] How many attendees do you expect for your largest convention or conference?
RECOBRD NUMBER VERBATIM

b1. Trade show
c1. A meeting requiring a facility rental
d1. Food & beverage event
e1. Consumer show
f1. Other: specify________

Q2. Thinking about the type of meeting space you require for your events, do you need…?

a. Ballroom

1 Yes
2 No
VOLUNTEERED
9 Don't know

b. Exhibit hall

b1. [IF YES] How many exhibitors would you expect to attend your largest event? **RECORD VERBATIM**

c. Break-out rooms

Q3. Thinking about the factors that are important to you when booking a facility, please rate the importance of the following features on a scale of **1 to 5 where 1 is Not at all important and 5 is Very important**

a. Facility size
   Scale 1 - 5

   VOLUNTEERED

   9 Don't know

b. Facility amenities
c. The destination where the facility is located
d. Facility location relative to air transportation access

Importance of Facility Amenities and Halifax as a Destination

Now I would like to ask you a few questions relating to facility amenities at convention and conference centres

Q4. Again, thinking about the factors that are important to you when booking a facility, please rate the importance of the following facility amenities on a scale of **1 to 5 where 1 is Not at all important and 5 is Very important**

a. Availability of parking
   Scale 1 - 5
   VOLUNTEERED
   9 Don't know

b. Adjoining hotel
   b1. On a star rating scale from 1 to 5, what star-rating would you require for an adjoining hotel?

   Scale 1 – 5 (allow half star ratings)
   VOLUNTEERED
   9 Don't know

c. Quality of service
d. Quality of food
e. Facility technology
f. Appropriate size of space/rooms for event
g. Moving materials in and out of facility
h. General perception of facility

Q5_1. I am now going to ask you about the characteristics of a destination where you would host an event, can you please tell me how important each characteristic is to you when deciding where to host your events on **scale of 1 to 5 where 1 is Not at all important and 5 is Very Important.**

a1. General perception of the destination
Importance Scale 1 - 5
VOLUNTEERED
9 Don't know

b1. Facility proximity to air transport access
c1. Availability of accommodations close to the facility
d1. Proximity of facility to downtown centre/core
e1. Local entertainment opportunities
f1. Arts/cultural/historical opportunities
g1. Hospitality of local citizenry
h1. The local climate/seasonality

Q5_2. Now I am going to ask you about the characteristics as they relate to Halifax, Nova Scotia as a destination and ask you to rate each characteristic for Halifax on a **scale of 1 to 5 where 1 is Very poor and 5 is Very good.**

a1. General perception of the destination
Importance Scale 1 - 5
VOLUNTEERED
9 Don't know

b1. Facility proximity to air transport access
c1. Availability of accommodations close to the facility
d1. Proximity of facility to downtown centre/core
e1. Local entertainment opportunities
f1. Arts/cultural/historical opportunities
g1. Hospitality of local citizenry
h1. The local climate/seasonality

Halifax World Trade and Convention Centre and Potential New Facility

Now I would like to ask you a few questions about the Halifax World Trade Convention Centre facility in Nova Scotia

Q6. **[Non-Lost Business]** Are you familiar with the Halifax World Trade and Convention Centre?
1 Yes GO TO Q7
2 No GO TO Q16
VOLUNTEERED
9 Don't know GO TO Q16

Q7. **[IF Q6 = YES OR Lost business/cancelled]** Have you used the Halifax World Trade and Convention Centre before to host an event?
1 Yes
2 No
VOLUNTEERED
9 Don't know

Q8. **[IF Q7 = YES]** Thinking of your experience with hosting an event at the facility, please indicate if you were very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with the following…

a. Service
1 Very satisfied
2 Somewhat satisfied
3 Somewhat dissatisfied
4 Very dissatisfied
VOLUNTEERED
9 Don't know

b. Ease of doing business
c. Facility
Q8c_1 [IF VERY OR SOMEWHAT SATISFIED], Why were you satisfied?
RECORD VERBATIM
Q8c_2 [IF VERY OR SOMEWHAT DISSATISFIED], Why were you dissatisfied?
RECORD VERBATIM

d. Destination – Halifax
e. Value for money paid
f. Overall experience

Q8A. **[IF Q7 = NO or DON'T KNOW]** Thinking of your perception of the facility, please indicate if you perceive the following characteristics to be excellent, good, only fair or poor

a. Service
1 Excellent
2 Good
3 Only fair
4 Poor
VOLUNTEERED
9 Don't know

c. Facility
Q8Ac_1 [IF EXCELLENT OR GOOD], Why is your perception [excellent or good]?
RECORD VERBATIM
Q8Ac_2 [IF ONLY FAIR OR POOR], Why is your perception [poor or fair]?
RECORD VERBATIM

d. Halifax as a destination

Q9. **[Non-lost business IF Q7 = YES]** What improvements could be made to the facility to be more usable for your events?

Q10. **[Non-lost business IF Q7 = YES]** Will you consider hosting future events at the Halifax World Trade and Convention Centre?
1 Yes
2 No
VOLUNTEERED
9 Don't know

Q11. **[IF Q10 = NO]** Why would you not consider hosting future events at the facility?

Q13. Will you consider hosting future events at the Halifax World Trade and Convention Centre?
1 Yes
2 No
VOLUNTEERED
9 Don't know

Q14. **[IF Q13 = NO]** Why would you not consider hosting future events at the Halifax World Trade and Convention Centre?

Q15. **[Non-lost business IF Q7 = YES or NO or DON'T KNOW]** If there was a new facility with approximately 120,000 square feet of flexible meeting and exhibit space, what would be your likelihood of hosting future events at this new facility in Halifax?
Would you say you would be…
1 Very likely
2 Somewhat likely
3 Somewhat unlikely
4 Very unlikely
VOLUNTEERED
9 Don't know

Q16. **[Non-lost business IF Q6 = NO or DON'T KNOW]** If there was a new facility located in Halifax, Nova Scotia with approximately 120,000 square feet of flexible meeting and exhibit space, what would be your likelihood of hosting future events at this new facility?
Would you say you would be…
1 Very likely
2 Somewhat likely
3 Somewhat unlikely
4 Very unlikely
VOLUNTEERED
9 Don't know

Q18A. **[Lost business]** Understanding that you have recently considered using the Halifax World Trade and Convention Centre, thinking of your decision, why did you choose to not use the facility?
ALLOW MULTIPLE RESPONSES – RECORD VERBATIM

Q18B. **[Lost business]** If there was a new facility in Halifax with approximately 120,000 square feet of flexible meeting and exhibit space, what would be your likelihood of hosting future events at this new facility?
Would you say you would be…
1 Very likely
2 Somewhat likely
3 Somewhat unlikely
4 Very unlikely
VOLUNTEERED
9 Don't know

Q17. If new facilities or increased capacity at existing facilities were introduced in other locations in Atlantic Canada, other than Halifax, please indicate the likelihood of hosting your events at these other locations,
Would you say you would be…
1 Very likely
2 Somewhat likely
3 Somewhat unlikely
4 Very unlikely
VOLUNTEERED
9 Don't know