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***Date of Report: 1995***

***Author: Enterprise, P.e.i. Research Division***

***Catalogue Number: 11-18-2***

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# ECONOMIC IMPACT

## TOURISM 1995



RESEARCH DIVISION



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# I FOREWORD

The Economic Impact: Tourism '95 report presents an overview of the data collected from exit surveys among business and pleasure visitors to Prince Edward Island, for the period May 14 to October 31, 1995. Using information collected through a 1994 survey of residents and tourism operators, the report also projects the economic impact of resident expenditures on tourism products, as well as tourism employment statistics (seasonal; non-seasonal) .

Exit **Surveys** were completed by conducting personal **interviews** with randomly selected travelers on-board Marine Atlantic and **Northumberland** Ferries as they departed Borden and Wood Islands, PEI. Other surveys were completed with travelers as they prepared to depart Prince Edward Island at the Charlottetown Airport.

The interviewers worked a three (3) days on, two (2) days off schedule to ensure that both weekday and weekend visitors to PEI were adequately sampled. Interviewers were instructed to approach every second **traveller** and determine their residency status. Travelers who were permanent or seasonal residents of PEI were screened out of **the** survey. A 17 minute (open and closed ended) questionnaire was delivered to qualified respondents. A telephone verification of 10% of completed exit surveys lends credibility to the data collected.

In total, 2,515 visitors to Prince Edward Island were interviewed for the 1995 Tourism Exit Survey. A composite of the random sample is as follows:

* General Pleasure Travelers	1,936
* Japanese Visitors	216
* <b>Motorcoach</b> Visitors	83
* Business Visitors	280

Basic economic indicators including: visitor volume; length of stay; party composition, party size; and expenditures were collected. As in previous years, these indicators were applied to actual traffic counts supplied by Marine Atlantic, **Northumberland** Ferries Limited and the various airline and **motorcoach** tour companies that **service** Prince Edward Island. **All** resulting projections are estimations and should be read with caution. The projections are based on the data collected by the survey instrument, applied to actual traffic statistics.

Nineteen ninety-five (1995) tourism dollars have been adjusted for inflation and, where appropriate, are reported in both 1995 dollars and in constant 1992 dollars.

Consumer Diaries, completed with the cooperation of 250 Island households in 1993 and 1994, were used to report the economic contribution that residents made to Prince Edward Island's Tourism Industry in 1995. Participating households were proportionally distributed among Prince Edward Island's three (3) counties, and were further balanced according to pre-selected demographics.

An Employment **Survey**, completed by 416 tourism operators in 1994 was used to report the economic impact of tourism on Prince Edward Island's **labour** market. The operators sampled were proportionally distributed among Prince Edward Island's eleven tourism regions, and were further balanced according to the primary nature **of** their tourism business.

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## II EXECUTIVE SUMMARY

Tourism continues to be one of Prince Edward Island's premier industries. During the 1995 season, 777,902 pleasure and business visitors spent \$177.9 million (Table 1) while vacationing and conducting business on Prince Edward Island. This represents a 13% increase in tourist dollar expenditures, when compared to 1994 expenditure levels.

This figure does not include on-Island spending by residents on local tourism products, nor does it include resident spending when hosting or entertaining off-Island visitors in their own households. Resident expenditures on tourism products and incremental household expenditures associated with hosting friends/relatives in their households, are estimated at \$43.5 million.

Prince Edward Island's tourism markets remain dependent largely on four primary markets which include: Atlantic Canada; Ontario; Quebec; and New England. Visitations by Atlantic Canadians and Ontarians continue to account for the bulk of visitor receipts. In 1995, visitors from the other Atlantic Provinces spent \$40.7 million while vacationing in **PEI**. Ontario pleasure visitors spent an estimated \$32.4 million while vacationing in Prince Edward Island.

Each of Prince Edward Island's eleven tourism regions received direct benefits from the pleasure travel market (Table 2). While the Charlottetown and Cavendish Tourism Regions obtained the lion's share of visitor receipts, the other tourism regions received between \$1.5 million and \$16.1 million in visitor receipts.

A broad range of businesses on Prince Edward Island reap the financial benefits of Tourism. Tourism has direct financial implications for both traditional tourism operators (accommodations, restaurants, attractions, and crafts) and non-traditional tourism business (gas stations, transportation companies, utilities, **retail** food establishments, etc.) .

It is estimated that in 1995, traditional tourism businesses employed upwards of 17,000 people, on a full and part time basis (Table 7). These establishments generated a payroll that was in excess of \$54.7 million.

TABLE 1

EXPENDITURE PROJECTIONS - TOURISM 1995\*  
IN MILLIONS OF DOLLARS

ORIGIN	% PLEASURE VISITORS	NUMBER VISITORS	AVERAGE TRAVEL PARTY SIZE	TOTAL NUMBER TRAVEL PARTIES	AVERAGE EXPEND PARTY SIZE	TOTAL EXPEND PARTIES	AVE. EXPEND PER PARTY	TOTAL ACTUAL '95 \$ IN NIL	'92 \$ IN NIL
<b>N.S.</b>	<b>20.0%</b>	136,650	2.9	47,121	2.5	54,660	\$378	<b>\$20.6</b>	\$19.9
<b>N.B.</b>	<b>14.0%</b>	95,655	2.9	32,984	2.5	38,262	\$378	\$14.4	<b>\$13.9</b>
<b>NFLD</b>	<b>3.0%</b>	20,498	3.4	6,029	3.2	6,406	\$898	\$5.7	\$5.5
ONT.	<b>20.0%</b>	136,650	2.7	50,611	2.5	54,660	<b>\$594</b>	\$32.4	<b>\$31.4</b>
QUE .	<b>7.0%</b>	47,827	2.9	16,492	2.3	20,794	\$575	<b>\$11.9</b>	<b>\$11.5</b>
<b>OTH CDA</b>	<b>7.0%</b>	47,827	2.4	19,928	2.2	21,740	<b>\$713</b>	<b>\$15.5</b>	\$15.0
<b>N.ENG.</b>	<b>7.0%</b>	47,827	2.5	19,131	2.5	19,131	\$627	<b>\$11.9</b>	<b>\$11.5</b>
I (ID ATL.	6.0%	40,995	2.4	17,081	2.2	18,634	\$496	\$9.2	\$8.9
OTB USA	13.0%	88,823	2.4	37,010	2.2	40,374	<b>\$477</b>	\$19.3	\$18.3
<b>INTN'L</b>	<b>3.0%</b>	20,500	2.3	8,913	2.1	9,792	\$603	<b>\$5.7</b>	\$5.5
<b>TOTALS</b>	<b>100.0%</b>	683,252	2.67	255,300	2.62	284,462	<b>\$518</b>	<b>\$146.6</b>	\$141.4
<b>TOTAL PLEASURE VISITORS</b>		683,252	2.67	255,300	2.4	284,462	<b>\$518</b>	\$146.6	<b>\$141.4</b>
<b>TOTAL BUSINESS VISITORS</b>		94,650	1.9	49,816	1.6	59,156	\$529	\$31.3	<b>\$30.3</b>
<b>TOTAL VISITORS</b>		777,902	2.55	305,116	2.43	343,618	\$520	\$177.9	<b>\$171.7</b>
<b>TOTAL ADJ. S PST/GST (1.177)</b>								<b>\$151.1</b>	\$145.5
<b>TOTAL CONTRIB. TO GOV'T</b>								<b>\$26.8</b>	<b>\$25.8</b>
CONTRIBUTION PST								<b>\$14.3</b>	<b>\$13.8</b>
CONTRIBUTION GST								<b>\$12.5</b>	\$12.0

\* BASED ON ACTUAL TRAFFIC COUNTS AND THE 1995 TOURISM EXIT SURVEY, FOR 5 PERIOD MAY 14 TO OCTOBER 31, 1995.

TABLE 2

REGIONAL **SHARE** OF PLEASURE TOURISM RECEIPTS\*  
IN MILLIONS OF DOLLARS

TOURISM REGION	PERCENT OF OVERNIGHT VISITORS	PROJECTED ECONOMIC IMPACT IN ACTUAL '95 DOLLARS	PROJECTED <b>ECONOMIC</b> IMPACT IN ADJUSTED '92 <b>DOLLARS</b>
BEACHES	7%	\$10.3	\$9.9
CAVENDISH	22%	\$32.3	\$31.3
CHARLOTTETOWN	32%	\$46.9	\$45.3
EASTERN KIN(3S	5%	\$7.3	\$7.0
EVANGELINE	2%	\$2.9	\$2.8
KENSINGTON	4%	\$5.9	\$5.7
NEW LONDON	1%	\$1.5	\$1.4
SOUTH SHORE	4%	\$5.9	\$5.7
SOUTHERN KINGS	6%	\$8.7	\$8.4
SUMMERSIDE	11%	\$16.1	\$15.5
NEST PRINCE	5%	\$7.3	\$7.0
DID NOT OVERNIGHT	1%	\$1.5	\$1.4
<b>TOTALS</b>	<b>100%</b>	<b>\$146.6</b>	<b>\$141.4</b>

\* BASED ON 1995 PLEASURE EXPENDITURES OF \$146.6 BILLION



TABLE 3

1995 PLEASURE TOURISM RECEIPTS BY REGION\*  
IN MILLIONS OF DOLLARS

	BEACHES	CAVEND	CH' TOWN	S. KINGS	EVANG	KENS	NEW LONDON	S. KINGS	S. SHORE	S' SIDE	W. PRINCE	DID NOT O'NIGHT
ACCOMM	\$3.1	\$10.8	\$12.2	\$1.6	\$0.7	\$1.2	\$0.3	\$2.2	\$1.5	\$4.2	\$1.3	\$0.0
REST MEALS	\$3.1	\$8.8	\$16.1	\$2.1	\$1.1	\$1.7	\$0.5	\$2.6	\$1.9	\$5.3	\$2.4	\$0.8
GROC & LIQUOR	\$1.0	\$2.7	\$1.8	\$1.0	\$0.2	\$0.8	\$0.1	\$1.0	\$0.5	\$1.0	\$0.6	\$0.0
ADMISS	\$0.6	\$2.2	\$2.7	\$0.2	\$0.1	\$0.3	\$0.0	\$0.3	\$0.4	\$0.7	\$0.3	\$0.2
CRAFT & SOUV	\$0.9	\$3.2	\$6.1	\$0.7	\$0.3	\$0.7	\$0.2	\$0.7	\$0.4	\$1.6	\$0.8	\$0.2
AUTO RELATED	\$0.7	\$2.5	\$3.3	\$0.8	\$0.2	\$0.7	\$0.1	\$1.1	\$0.5	\$1.2	\$0.7	\$0.2
OTH SHOP	\$0.5	\$1.1	\$2.8	\$0.5	\$0.2	\$0.3	\$0.1	\$0.6	\$0.4	\$1.4	\$0.7	\$0.1
SPORTS & REC	\$0.2	\$0.6	\$0.9	\$0.3	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.2	\$0.3	\$0.0
NIGHT - LIFE	\$0.1	\$0.2	\$0.5	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.1	\$0.0
OTHER	\$0.1	\$0.2	\$0.5	\$0.0	\$0.1	\$0.2	\$0.2	\$0.1	\$0.3	\$0.3	\$0.1	\$0.0
TOTALS	\$10.3	\$32.3	\$46.9	\$7.3	\$2.9	\$5.9	\$1.3	\$8.9	\$5.9	\$16.1	\$7.3	\$1.5

\* BASED ON AVERAGE SPENDING BY VISITOR OVERNIGHTING MAINLY IN THAT REGION, IN 1995 DOLLARS.

## INSIGHT INTO KEY MARKETS

The current mix of **PEI's** tourism markets suggests similarities and differences based on geographic origin. The following offers insight into each of Prince Edward Island's key geographic markets.

### **Maritimes:**

The Maritimes is a strong (96%) repeat visitor market. It also tends to be a younger market, with 53% of **Maritimers** being under 40 years of age. The Maritimes continues to be a stronger family market and weekend **traveller** market whose main destination is PEI. Their average length of stay in PEI was 4.0 nights. Visiting friends and relatives (**VFR**) is a strong travel motive for Maritime visitors. Twenty-seven percent of all Maritimers stayed with friends and relatives and thus, spent less against accommodations and entertainment. In 1995, Maritimers tended to participate in sightseeing, beach visits, and shopping for crafts and general merchandise, golf more than other activities.

### Newfoundland:

Newfoundland is a strong (68%) repeat visitor market. With 63% of these visitors being under 40 years of age, it is not **surprising** to find that proportionally, Newfoundland is a stronger "**family**" versus "adult" market, when compared to their Maritime counterparts. Because of distance and ground transportation routes, Newfoundlanders tend to be longer term visitors than are **Maritimers**. Their average length of stay in PEI was 7.8 nights. Newfoundland visitors tend to participate in sightseeing, beach visits, shopping for crafts and general merchandise, National Park visits, and visits to fun/theme parks more than other activities.

### Ontario:

Ontario is a stronger 40 plus market (**72%** were over 40 years of age), with these visitors showing strong escape, rest and relaxation travel motives. Ontarians tend **to** be adult travelers (67%), who have higher per party expenditure levels as they spend more against accommodations, restaurant meals, etc. Unlike Atlantic Canadian visitors, Ontarians tend to view Prince Edward Island as an important **stop-over** in a Maritime vacation. Their average length of stay in PEI was 5.3 nights. Visitors from Ontario tend to participate in sightseeing, beach visits, and shop for crafts/souvenirs, more than other activities.

### Quebec:

Quebec is a strong 40 plus (69%) couples (77%) market, whose travel motives focus on escape and rest/relaxation. Quebecers are strongly motivated by the sun and beaches, coupled with the romantic lure of an Island destination. Their average length of stay in PEI was 5.6 nights. While per party expenditure levels are not as high as Newfoundlanders, Quebecers tend to out-spend **Maritimers**. Quebecers tend to participate in sightseeing, beach visits, craft shopping, and National Park visits, more than other activities.

New England:

The New England States are a strong 40 plus couples markets, whose main travel motives are escape, rest and relaxation. Their desire to experience the history and culture of other regions, drives these travel motives. Their average length of stay in PEI was 5.2 nights. Being older, New England visitors tended to spend at levels above **Quebecers**. Since they are, for the most part, not **VFR** visitors, their average spending levels are higher than visitors from the other Maritime provinces. Given **PEI's** geographic **location**, New **Englanders**, like **Ontarians**, tended to view Prince Edward Island as a part of a Maritime experience.

### III TOURISM PIANT INVENTORY

The physical infrastructure of tourism on Prince Edward Island was defined in a 1994 survey of Tourism Operators, and is presented in Table 4.

TABLE 4  
TOURISM PLANT **INVENTORIES**

	1995	
	OPERATIONS	UNITS
<b>FIXED ROOF ACCOMMODATIONS</b>	<b>840</b>	5,717
<b>CAMPGROUNDS</b>	<b>53<sup>^</sup> 37*</b>	5,233 <sup>A</sup> 3,757*
RESTAURANTS	463	<b>N/A</b>
ATTRACTIONS	102	<b>N/A</b>
ACTIVITIES (SPORTS, ETC)	144	N/A
CRAFT/GIFT SHOPS	170	N/A

NOTE : <sup>A</sup> Includes Provincial and National Park *campgrounds*  
\* Private *campgrounds* **only**

The distribution of the Island's Tourism Plant on a regional basis highlights some interesting variations (Table 5). The accommodations inventory reveals that the Cavendish, Beaches, **Charlottetown, Southern Kings**, and the South Shore tourism regions continue to account for the lion's share of the province's fixed roof (65%) and campground operations (65%).

Ninety-one percent of visitors who stayed in paid accommodations reported that their accommodations either met (61%) or exceeded (30%) their expectations. Equally important is the fact that 64% of these visitors indicated that a star grading system was an important consideration when booking their accommodations.

**PEI's "attractions"** inventory is concentrated in five tourism regions: **Cavendish, Southern Kings, West Prince, Charlottetown** and Kensington. "Activities" are concentrated in: Cavendish, Charlottetown, Southern Kings, Beaches and the Eastern Kings tourism regions. Forty-seven percent of the province's inventory of craft/gift shop operators are located in three tourism regions - Southern Kings, **Charlottetown**, and Cavendish.

**TABLE 5**  
**SUMMARY OF TOURISM PLANT OPERATIONS**  
**BY REGION - 1995**

REGION	ACCOMMODATIONS		CAMPING		ATTRACTIONS		RESTAURANTS		HOTELS		CRAFTS/GIFTS	
	#	X	#	X	#	Z	#	Z	#	X	#	Z
WEST PRINCE	51	6	8	15	14	14	43	9	9	6	14	8
EVANGELINE	13	1	1	2	4	4	6	1	2	1	8	5
SUMMERSIDE	32	4	2	4	5	5	53	12	6	4	15	9
CHARLOTTETOWN	81	10	5	9	11	11	30	7	8	6	9	5
NEW LONDON	30	4	0	0	1	1	5	1	2	1	5	3
CAVERDISH	121	14	7	13	19	18	39	9	28	20	23	14
BEACHES	119	14	14	26	5	5	18	4	14	10	9	5
S Y m E -	%	11	5	9	9	9	29	6	12	8	15	9
CHARLOTTETOWN	121	15	2	4	12	12	167	36	26	19	25	15
SOUTH KINGS	99	12	7	13	16	16	45	10	21	15	30	19
EAST KINGS	76	9	3	5	6	5	25	5	15	10	14	8
<b>TOTALS</b>	<b>839</b>	<b>100Z</b>	<b>54</b>	<b>100Z</b>	<b>102</b>	<b>100Z</b>	<b>460</b>	<b>100X</b>	<b>143</b>	<b>100X</b>	<b>167</b>	<b>100Z</b>

Collectively, the **Charlottetown** and Summerside tourism regions account for 51% of Prince Edward Island's restaurant inventory in 1995. This is not surprising given that these areas are **PEI's** main population centres. Based on the results of earlier surveys, in excess of **70%** of all visitors to PEI dined in local restaurants (other than fast-food) while vacationing on PEI.

Overall, Prince Edward Island restaurants compared favorably to restaurants from the visitor's home town, especially in the areas of service and food quality (Table 6). "Value" shows the poorest comparative rating.

**TABLE 6**  
**PEI RESTAURANT RATING vs**  
**RESTAURANTS FROM TOURIST'S HOME TOWN**

	<b>Z RATING WORSE</b>	<b>Z RATING ABOUT SAME</b>	<b>Z RATING BETTER</b>
PRESENTATION	3	74	23
MENU SELECTION	4	72	24
FOOD QUALITY	9	62	29
SERVICE	4	56	40
STAFF APPEARANCE	3	38	62
STAFF APPEARANCE	1	69	30
VALUE	16	53	31

●Source: 1994 Tourism **Exit Survey**

Future infrastructure developments within the various tourism regions should continue to focus on an analysis of regional strengths and weaknesses, while taking into consideration their target tourism markets. Regions that are strong in accommodations may wish to encourage the development of suitable attractions and/or sporting amenities as a means of luring additional visitors to their region. Conversely, regions that are comparatively stronger in terms of attractions or sporting amenities may wish to encourage the development of specific types of accommodation, to entice visitors to stay longer within their region.

## IV EMPLOYMENT

Tourism continues to make significant contributions to the economy of Prince Edward Island in 1995, through salaries, wages and resulting taxes (Table 7). A 1994 **survey** of tourism operators suggested that approximately 17,000 Islanders were employed in the tourism industry. This survey further suggested that tourist establishments paid out an estimated \$54.7 million in wages and benefits to 5,860 full time and 10,956 temporary employees.

Restaurants were the largest employment contributors, in terms of both share of industry employees (51%) and share of industry salaries and benefits (47%). Fixed roof accommodation and attraction operators were also important economic contributors. Fixed roof accommodation operators employed 20% of the industry's **labour** force and accounted for 20% of industry wages. Attraction operators accounted for 13% of the industry's **labour** force and 15% of salaries.

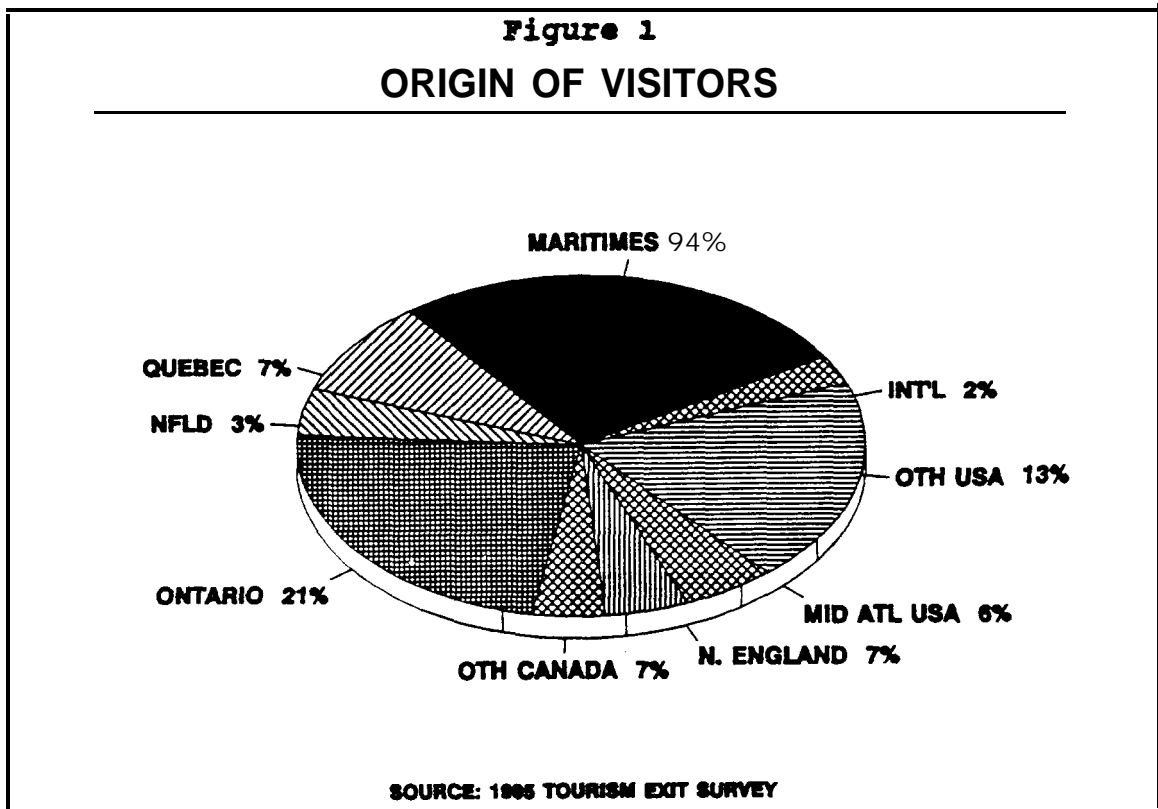
TABLE 7  
EMPLOYMENT - **PEI** TOURISM INDUSTRY

TYPE OF BUSINESS	SAMPLE SIZE	TOTAL # OPER.	WORKFORCE			SALARIES / WAGES		
			FULL-TIME		TOTAL WORKFORCE	PROJECTED FULL-TIME	PROJECTED TEMPORARY	PROJECTED TOTAL
Fixed Roof Accommodation	254	840	1434	- 1327	3281	\$6,523,813	\$4,455,498	\$10,979,311
Restaurants	52	465	2933	5371	8524	832,592,995	\$3,3,369,903	\$23,962,898
Attractions	33	103	918	1264	2182	\$4,433.9s3	\$3,662.383	\$8,096,366
Campgrounds	9	54	-	906	906	-	\$3,391,315	\$3,391*3M
Activities	15	144	237	922	1179	\$1,594,813	\$2,546,137	\$4,140,9s0
Crafts/Gift	53	170	278	466	744	81,430,943	8676 ,610	\$2,157,553
<b>TOTALS</b>	<b>416</b>	<b>1776</b>	<b>5860</b>	<b>10,956</b>	<b>16,816</b>	<b>\$26,626,547</b>	<b>\$28,101,846</b>	<b>\$54,728,393</b>

## V PLEASURE VISITOR PROFILE

### (i) Origin of visitors (Figure 1):

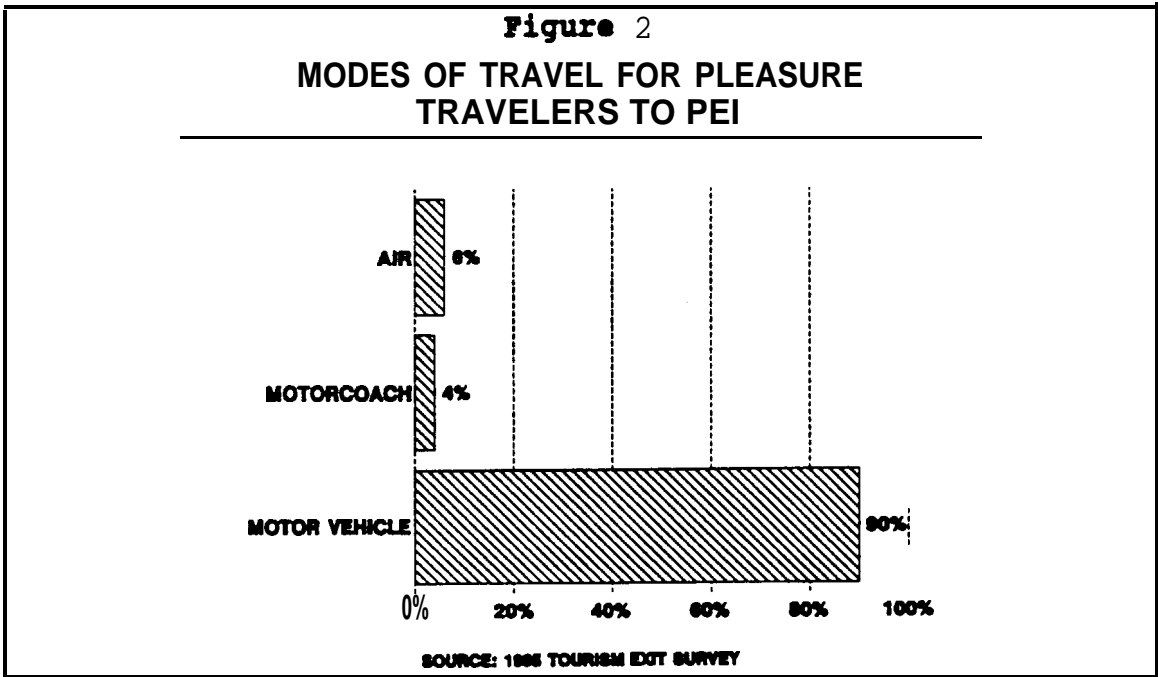
A total of 683,252 pleasure travelers are projected to have visited Prince Edward Island between May 15 and October 31, 1995. From a volume stand-point, the Atlantic and Central Canadian provinces (Quebec and Ontario) continue to be Prince Edward Island's primary tourism markets. Collectively, these markets represent 64% (437,280 visitors) of all pleasure visitors. Secondary markets that include: the New England, Mid Atlantic and other continental American States have a combined visitation rate of 26% (177,645 visitors), while Western Canadians and International visitors (outside the USA) continue to be considered tertiary markets, with a combined visitation rate of 9%.



### (ii) Mode of Transport (Figure 2):

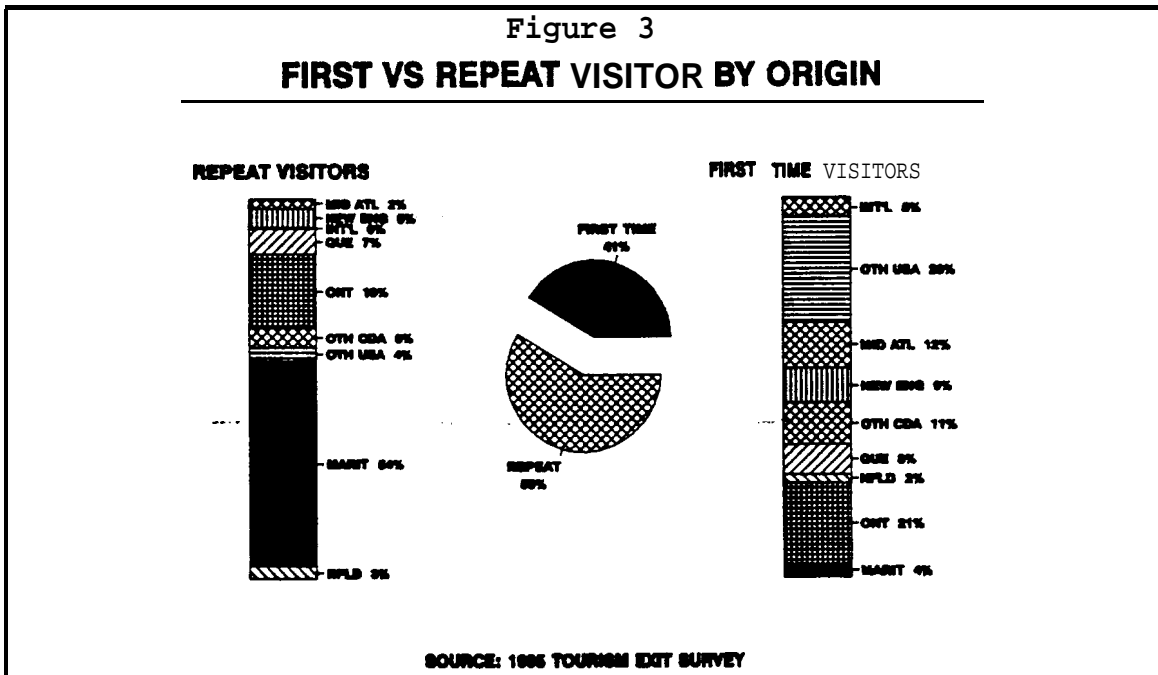
Road travel, including automobiles, recreational vehicles and motorcoach, continues to be the primary mode of travel for 94% (639,103) of Prince Edward Island's pleasure visitors. Seventy-two percent of all road travelers entered the province via the Marine Atlantic ferry terminal. The balance of pleasure visitors traveling to PEI by motor vehicle, (28%) arrived via Northumberland Ferries Ltd. Air is the second most popular mode of transport with 6% or 44,149 pleasure visitors arriving by air.





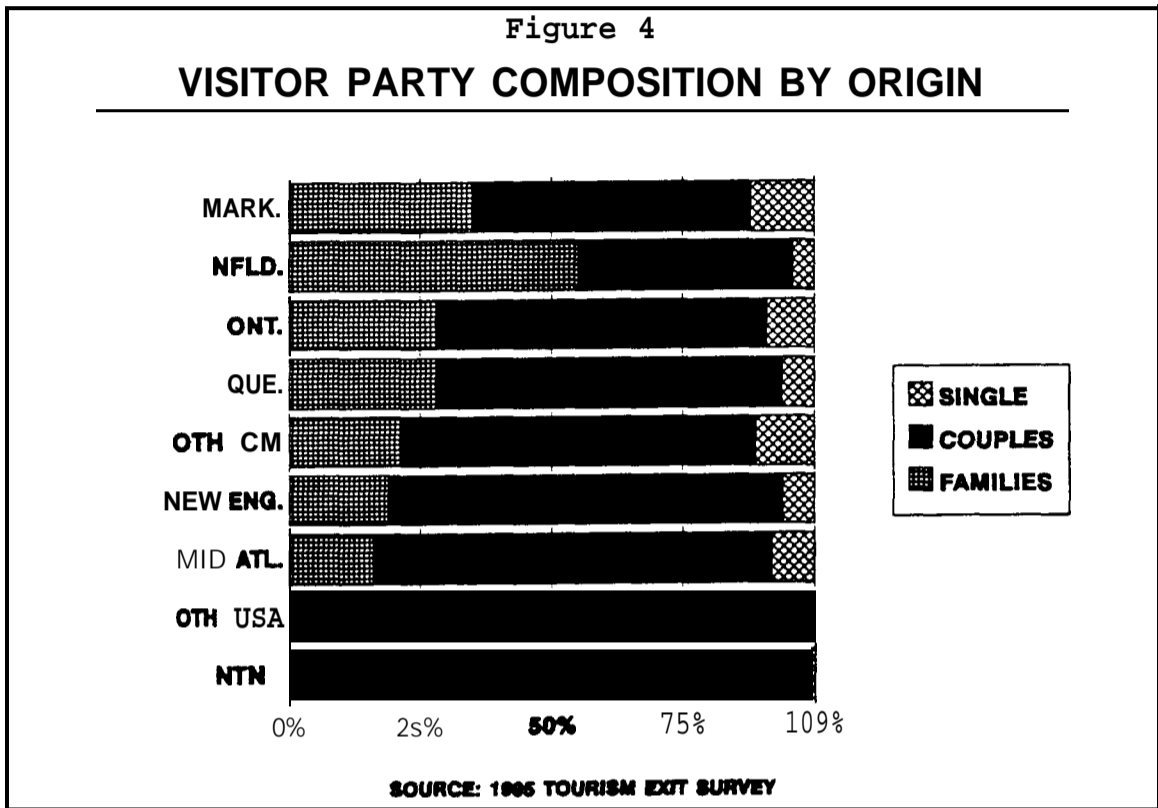
(iii) **First vs Repeat Visitors (Figure 3):**

Fifty-nine percent (59%) of all pleasure travelers to Prince Edward Island in 1995 (an estimated 403,119 visitors) were repeat visitors, while 41% (280,113 visitors) were first time visitors. As was the case in 1994, first time visitors to PEI in 1995 were primarily of American and International origins, while repeat visitors were mainly from the Atlantic provinces (93%). The high repeat visitation rates for Atlantic travelers is not surprising, given this market's historical travel patterns and its proximity to Prince Edward Island.



(iv) **Party Composition and Age (Figure 4):**

Sixty-four percent of all pleasure travelers that visited Prince Edward Island in 1995 (437,281 visitors) were either couples traveling alone or with other couples. Families represented 27% (184,478 visitors) of all visitors, while single travelers accounted for 9% (61,493 visitors) of visitations. In comparison to 1994 statistics, PEI realized an increase in the number of single travelers (15%) and couples (7%) visiting PEI in 1995, while the number of family visitors decreased by 11%.



Fifty-three percent (53%) of all Maritime "visitor parties" to PEI in 1995 consisted of adult couples. Thirty-five percent (35%) were families, while the balance-of Maritime travel parties (12%) were single travelers. In comparison, significantly more Ontarian (62%) and Quebec (67%) travel parties were adult couples, while the majority of Newfoundland's travel parties (55%) were comprised of families. American and International pleasure travelers showed the highest tendency toward couples travel, with 75% and 73% of their respective travel parties being couples.

Given PEI's strong appeal to the couples market, it is not surprising that 71% (485,109 visitors) of all pleasure travelers to PEI in 1995 were forty years of age and older (Table 8). Atlantic Canadian and International markets tend to be skewed younger, with significant proportions (40%) being under 40 years of age.

**TABLE 8**  
**AGE OF VISITORS BY ORIGIN**

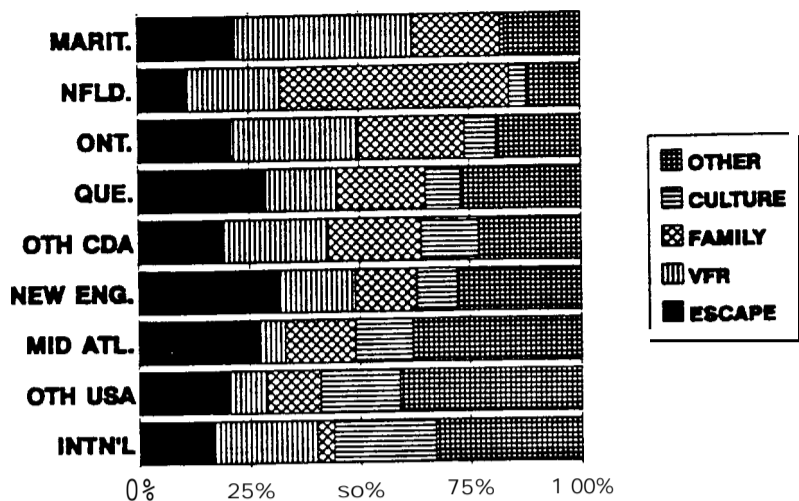
ORIGIN	% <40 YRS	% 40 YRS & OVER
<b>MARITIMES</b>	37	63
<b>NEWFOUNDLAND</b>	62	<b>38</b>
ONTARIO	28	72
<b>QUEBEC</b>	30	70
OTHER CANADA	30	70
<b>NEW ENGLAND USA</b>	19	81
MID ATLANTIC USA	13	07
OTHER USA	12	88
INTERNATIONAL	44	56

**(v) Visitor Travel Motives (Figure 5):**

Eighty-percent (546,601 visitors) of all visitors to PEI reported adult versus family travel motives for their 1995 pleasure holiday. Maritime travelers vacation on PEI primarily to: visit friends and relatives (40%); escape (22%); and experience a **family vacation (20%)**. In contrast, 52% of Newfoundland visitors reported family travel motives, 21% came to PEI to visit friends and relatives, while 11% came to escape. Twenty-nine percent of Ontarians reported that their travel motives were to visit friends and relatives, 24% reported family vacation motives **and 21% travelled** for escape and relaxation purposes. The Quebecers that visited PEI in 1995 were more likely to travel for escape motives (55%), while American and International visitors are more likely to travel for escape, and history and culture motives.

Figure 5

VISITOR TRAVEL MOTIVES BY ORIGIN



SOURCE: 1995 TOURISM EXIT SURVEY

(vi) **PEI's** Share of Total Trip **Nights** (Figure 6):

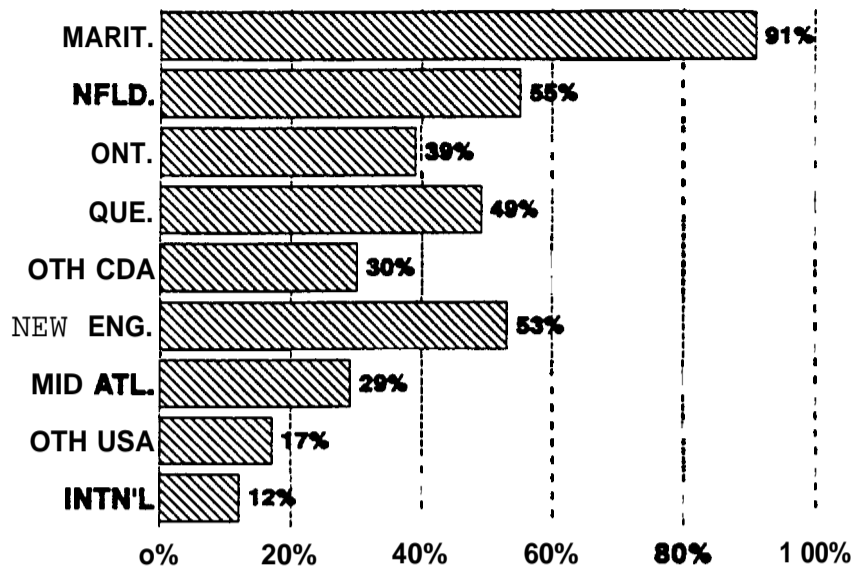
While the average number of nights spent on PEI by visitors of all origins is estimated at 4.8 nights, it was not surprising to discover that Prince Edward Island's proximity to origin markets has a direct impact on the province's share of trip nights. PEI received a significant share of Maritime trip nights (91%), while receiving comparably smaller shares of New England (53%), Newfoundland (55%), Ontario (39%) and Quebec (49%) pleasure travel, trip nights. As discovered in 1994, Maritimers, for the most part, consider PEI a single pleasure travel destination, while pleasure visitors from other origins include PEI in a multi-stop, Maritime vacation experience.

Prince Edward Island received a smaller share of total trip nights from Western Canada (30%), from US origins other than the New England and Mid Atlantic States (17%) and from International (12%) visitors. This is not surprising given the "long-haul" nature of these markets.

In addition to the continued development of the motorcoach industry, the future growth in these long-haul markets may rest with increased efforts to establish additional direct air links to PEI, in combination with high value, fully inclusive vacation packages.

Figure 6

PEI SHARE TRIP NIGHTS BY ORIGIN



SOURCE: 1995 TOURISM EXPENDITURE SURVEY

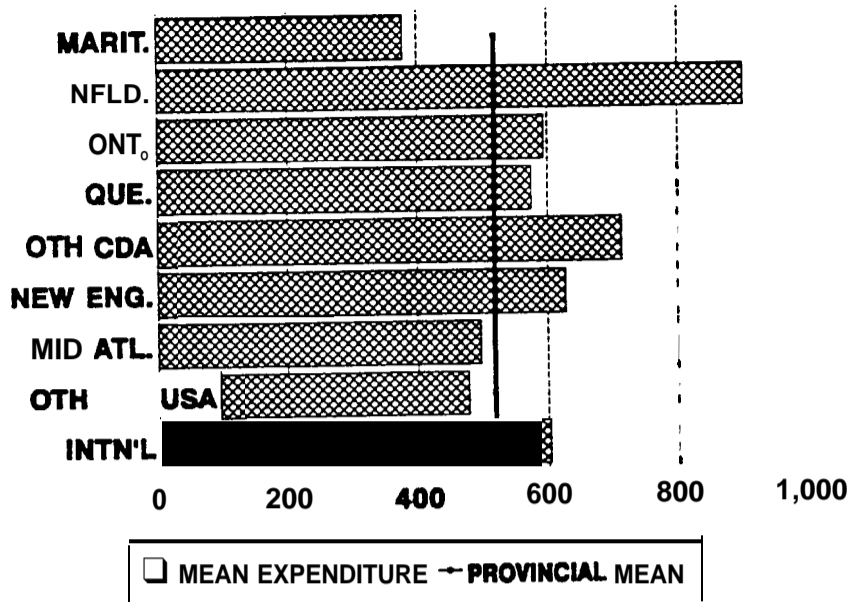
When compared to 1994 levels, PEI increased its overall share of visitor trip nights by 4%. PEI's share of Newfoundland and Maritime trip nights increased by 13% and 4% respectively, when compared to 1994 levels. PEI also received an increased share of trip nights among visitors from US States other than New England (4% increase), Ontario (3% increase), Quebec (2% increase), while obtaining a smaller share of New England (1% decrease) and International (9% decrease) trip nights. PEI's share of Western Canadian trip nights remained at 1994 levels.

(vii) Visitor Expenditures (Figure 7):

The mean expenditure per party for all visitors to PEI in 1995 is estimated at \$518, an increase of 6% when compared to 1994's average expenditure level of \$488. Spending by visitors from Newfoundland (\$898), Western Canada (\$713), New England (\$627), International origins (\$603), Ontario (\$594), Quebec (\$575) were at levels above the provincial average. In comparison, expenditures by visitors from the Maritime provinces (\$378) and US States other than New England (\$483) were below the provincial norm.

Figure 7

MEAN VISITOR EXPENDITURE BY ORIGIN



SOURCE: 1995 TOURISM EXIT SURVEY

As shown in Table 9, 65% of pleasure travel expenditures or \$95.3 million were against 3 tourism product categories: accommodations (\$38.1 million), restaurant meals (\$46.9 million) and grocery/liquor products (\$10.3 million).

Seventeen percent of visitor expenditures, or \$24.9 million, were against shopping for crafts/souvenirs (\$14.7 million) and other shopping goods (\$10.2 million). Ten percent, or \$14.7 million, were for "entertainment," including admissions (\$8.8 million), sports and recreation (\$3.0 million) and night time entertainment (\$2.9 million). Eight percent of all visitor expenditures (\$11.7 million) were automobile related.

When compared to other visitors, Maritimers tended to spend less on crafts and souvenirs, while spending significantly more on "other" shopping items. Ontarians, Quebecers, Western Canadians, Americans and International visitors also tended to spend more against crafts and souvenirs, than did Maritime visitors.

**TABLE 9**  
**PERCENT OF VISITORS EXPENDITURES ON TOURISM PRODUCTS**  
**BY ORIGIN**

	TOTAL %	MAR %	NFLD %	ONT %	QUE %	OTH CAN %	NEW ENG %	MID ATL %	OTH USA %	INTL %
AmQMmAn-	26	21	24	27	34	26	34	29	29	22
REST. MEALS	32	31	27	32	30	31	31	34	33	33
GROCERIES/LIQ	7	10	10	6	8	6	5	4	5	5
ADMISSIONS	6	8	9	6	6	6	4	5	4	5
CRAFT/SOUVENIR	10	7	9	12	10	13	11	15	16	20
AUTO RELATED	8	8	7	9	7	9	9	8	8	6
OTH SHOPPING	7	10	9	5	3	6	4	3	2	4
SPORT/REC	2	3	4	2	1	2	1	1	1	2
NIGHTLIFE	2	2	1	1	1	1	1	1	0	3
TOTALS	100	100	100	100	100	100	100	100	100	100

(viii) Visitor Activities (Figure 8):

Significantly more visitors to PEI participated in sightseeing (84%), beach visits (57%), souvenir shopping (57%), and general merchandise shopping (54%), when compared to all other activities. Such high participation levels are not surprising considering that these activities are generic in nature, and are often unplanned.

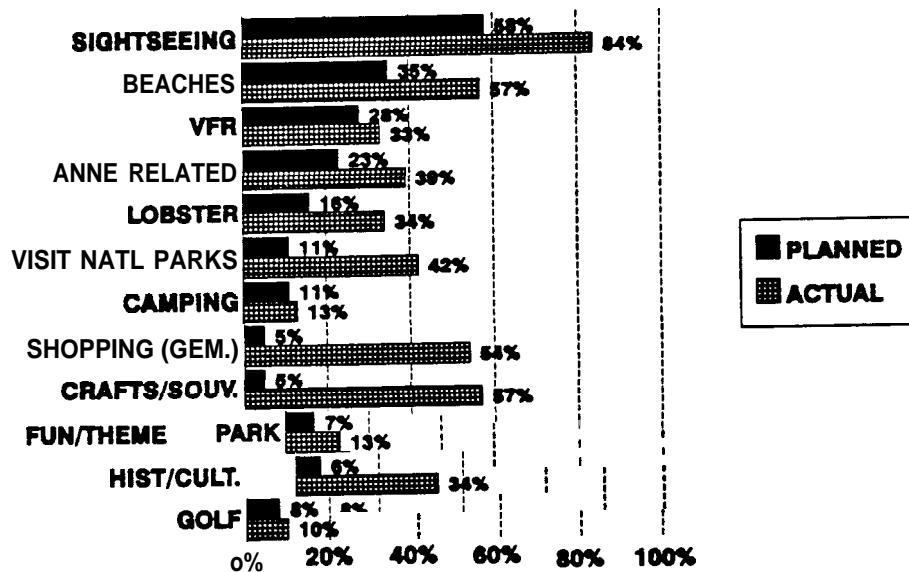
In comparison, participation levels for: National Park visits (42%); Anne attractions (39%); lobster suppers (34%), historical/cultural attractions (34%) and other activities are considerably lower. These latter activities appeal to a narrower target audience and in some cases, require a higher degree of preplanning. Growing participation rates in these activities may lie with increasing the visitor's awareness of PEI's activities and attractions, before they arrive on PEI. Niche marketing (i.e. to golfers, families, etc.) may also boost participation rates.

Activity driven media advertisements, supported by activity driven fulfillment pieces should be targeted at prospective visitors who are in the process of planning their PEI vacation. Data base management practices at the 1-800 level would assist in this area.

Maritimers were less likely to participate in sightseeing, lobster suppers, historical/cultural activities (including Anne/Lucy Maud Montgomery) and souvenir shopping than were other visitors. They were also more likely to shop for general merchandise, visit fun/theme parks, commercial attractions, play golf, participate in sporting activities and enjoy PEI's nightlife, than were other visitors. Historical and cultural attractions were also less appealing to Newfoundland visitors, who preferred to shop for general merchandise, play golf, visit fun parks, theme parks and other commercial attractions.

Figure 8

ACTUAL VS PLANNED VISITOR ACTIVITIES



SOURCE: 1995 TOURISM EXIT SURVEY

Visitors from origins other than the Maritime provinces tended to utilize Prince Edward Island's beaches more often than did Maritime visitors. These visitors also reported higher participation levels in souvenir shopping, Anne/Lucy Maud sites, lobster suppers and **live** theatre.

American and International visitors tended to display higher participation rates for sightseeing, visiting historical and cultural attractions and **land/harbour** tours. They were also less likely to shop for general merchandise, **visit** fun/theme parks, commercial attractions and were less likely to play golf, when compared to visitors from other origins.



## VI

## REGIONAL PLEASURE VISITOR SUMMARIES

**(i) BEACHES TOURISM REGION**

## Regional Tourism Plant Inventory

A 1994 Survey of Tourism Operators conducted by the Research Division of Enterprise PEI defined the Beaches tourism plant. The strength of the Beaches tourism **region's** plant lies in its accommodation sector, which accounts for 74% of its total plant inventory.

When compared to the Provincial Tourism Plant, the Beaches tourism region ranks first in the number of campground operators (26%), and shares first place in the number of fixed roof accommodation operators (14%).

THE **BEACHES** TOURISM PLANT

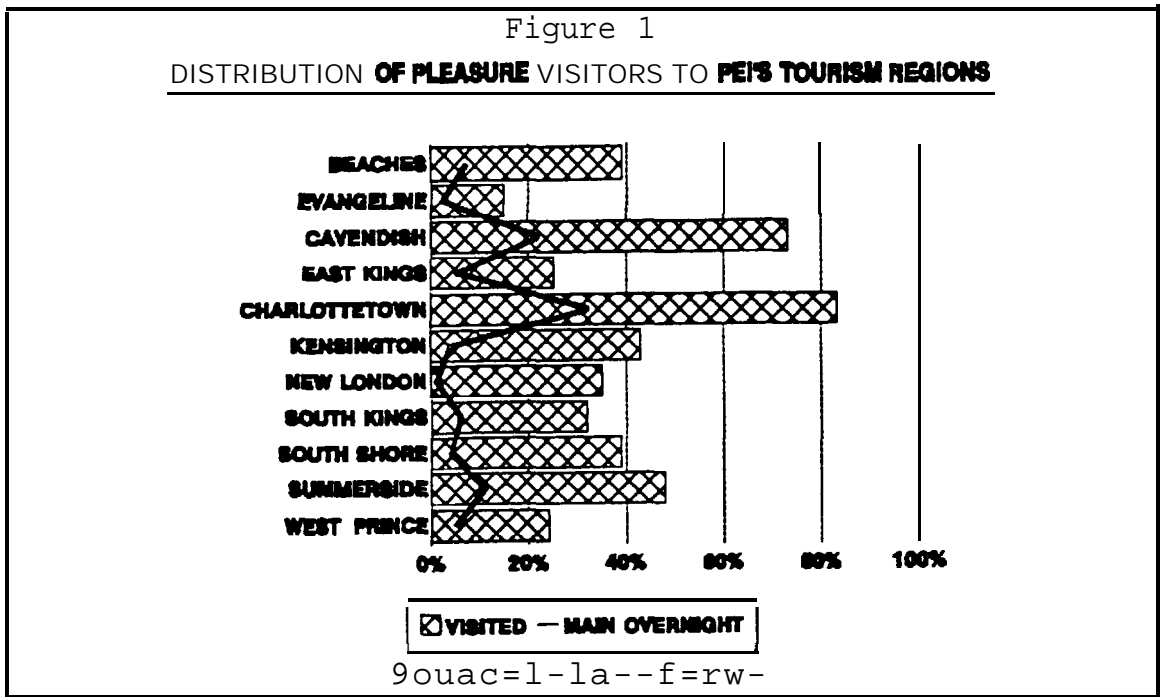
	1994	
	<b>NUMBER OPERATIONS</b>	<b>NUMBER UNITS</b>
ACCOMMODATIONS	119	692
CAMPGROUNDS*	14	1349
RESTAURANTS	18	--
ATTRACTIONS	5	--
ACTIVITIES	14	--
<b>CRAFTS/GIFT SHOP</b>	9	--

● Includes government **campgrounds**

To lure additional visitors to the region and to entice visitors in this region to stay longer, future **expansion** or development within the Beaches tourism region should be directed toward the attraction and restaurant sectors.

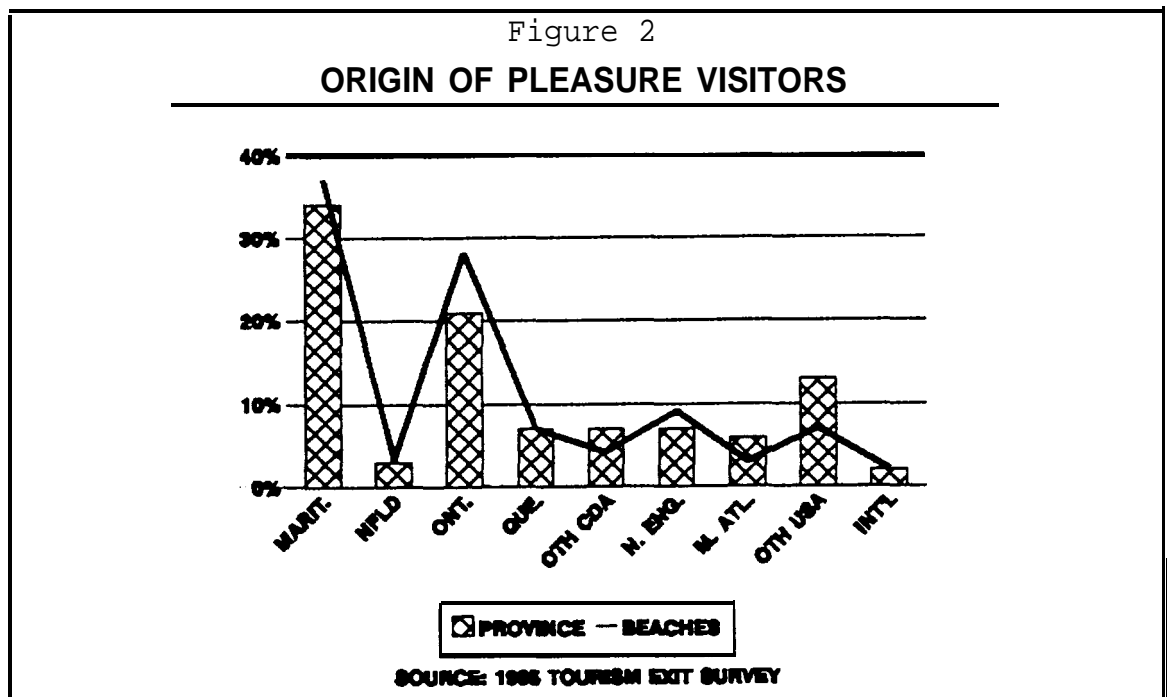
The 1995 Tourism Exit Survey concluded that 39% of all pleasure travelers to Prince Edward Island (an estimated 266,468 visitors) visited the Beaches tourism region. The Beaches was the "main" overnight **destination for 7%** of all pleasure **travellers** (47,828 visitors), who stayed an average of 6.7 nights, occupying an estimated 158,395 room nights in paid and non-paid accommodations.

When compared to 1994 visitations, the Beaches tourism region realized a 10.5% decrease in overnight, pleasure travel visitations. However, the length of time these visitors stayed in the region increased from 5.6 nights in 1994, to 6.7 nights in 1995.

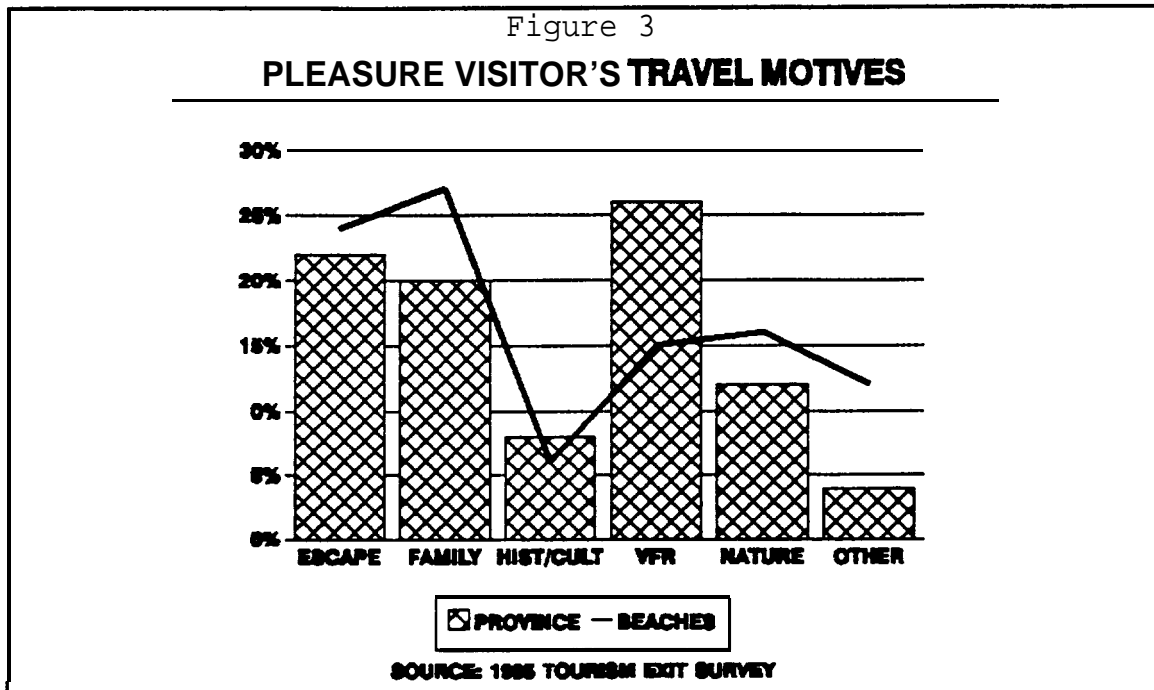


Visitor Profile

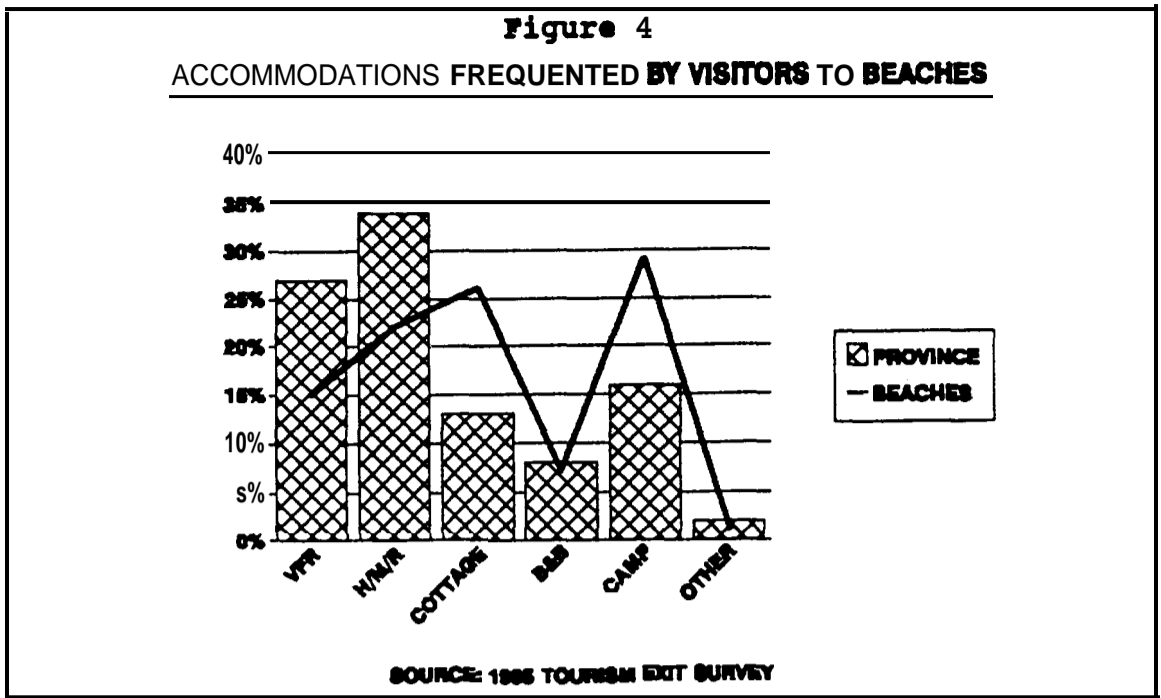
Thirty-eight percent of all overnight visitors to the Beaches tourism region were Maritime pleasure travelers, while 29% were Ontarians. Americans represented 21% of visitations, while the balance (12%) were from other origins. Fifty-eight percent of the visitors who overnighted mainly in the Beaches region were repeat visitors.



The strong majority of visitors that overnights in the Beaches tourism region were adult travelers (77%), who were 40 plus years of age (64%). Although significantly more visitors to this region cited "family vacation" travel motives when compared to the provincial norm, given visitor party composition and age, "family" is interpreted as spending more time with one's spouse. Other motives for visiting the area included: **relaxation/escape (24%)**; to observe and experience nature (16%), and to visit friends and relatives (15%) .

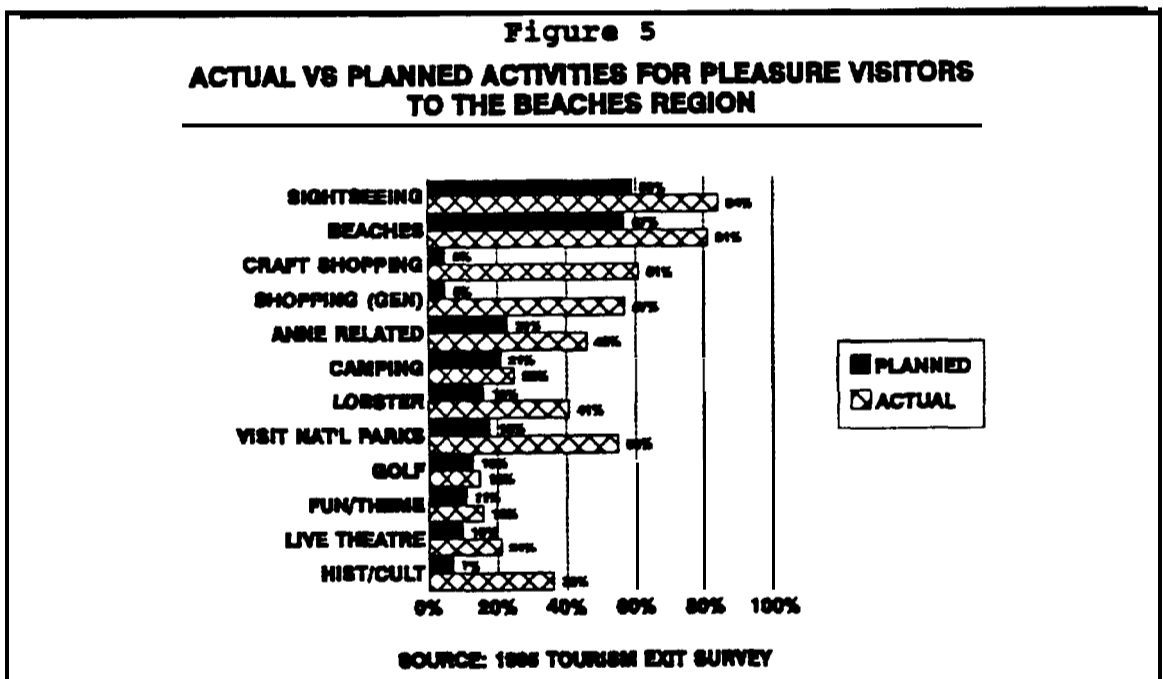


Eighty-five percent of visitors that overnights in the Beaches tourism region stayed in paid accommodations, while 15% stayed with friends and relatives in non-paid accommodations. Twenty-seven percent of all visitors to the Beaches tourism region stayed in cottages, while 22% stayed in hotels/motels. Seven percent of all visitors stayed in bed and breakfast establishments, while 29% overnights in campgrounds and trailer parks. When compared to provincial standards, the Beaches tourism region attracted significantly more cottage and campground vacationers, while attracting significantly fewer **VFR** and hotel/motel visitors.



Visitor Activities

Sightseeing (59%) and visiting the beaches (57%) ranked first and second in planned activities by visitors to the Beaches tourism region. Other planned activities included: Anne/Lucy Maud Montgomery activities; camping; **golf**; lobster suppers and fun/theme parks.

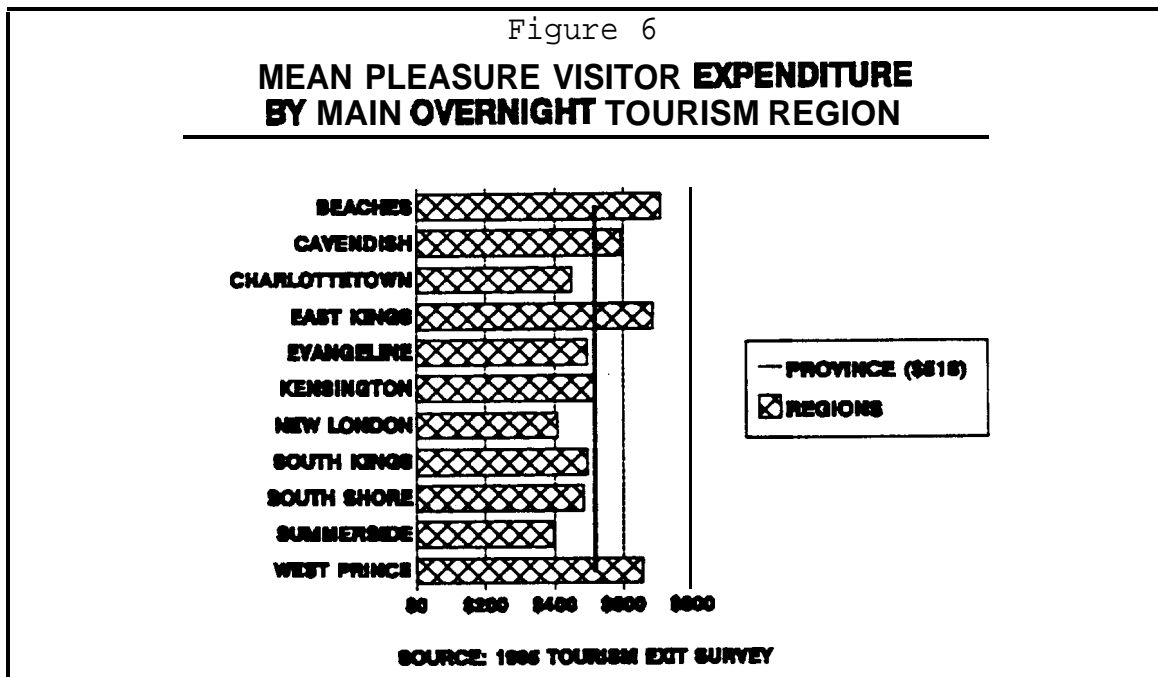


Visitors to the Beaches tourism region actually participated in sightseeing (84%) and beach visits (81%) more than other activities. These activities, in addition to the Region's handicrafts, National Parks, history and culture should serve as the primary lure pieces or themes when enticing additional visitors to the Beaches tourism region.

### Visitor Expenditures

Visitor receipts for the Beaches tourism region are estimated at \$10.3 million. The average party expenditure by those who overnights mainly in the Beaches tourism region is estimated at \$710, 37% above the \$518 average party expenditure recorded for the province. This expenditure included an average 2.5 people.

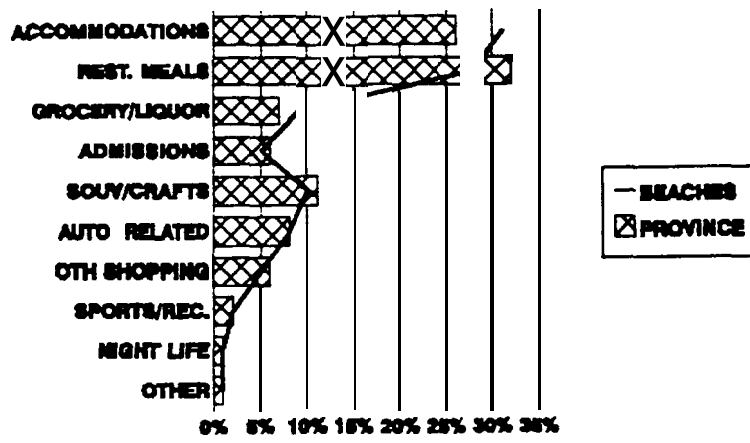
Collectively, accommodations, restaurant meals and handcraft/souvenir purchases represented 68% of visitor receipts. Purchases of **grocery/liquor** products (9%) and automobile expenses (8%) accounted for 17% of expenditures. Admissions to attractions, **events, sports** and recreation amenities, and nightlife accounted for the balance of visitor receipts.



When compared to provincial norms, visitors to the Beaches tourism region tended to spend more **against** accommodations and grocery/liquor products, while spending less against restaurant meals.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES ON VARIOUS TOURISM PRODUCTS



SOURCE: 1996 TOURISM EXP. SURVEY

## (ii) THE CAVENDISH TOURISM REGION

### Regional Tourism Plant **Inventory**

A 1994 Survey of Tourism Operators defined the physical infrastructure of the Cavendish tourism plant. The strength of the Cavendish region's tourism plant lies in its attractions, activities and accommodations sectors.

#### **THE CAVENDISH TOURISM PLANT**

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	121	995
CAMPGROUNDS*	7	<b>1358</b>
RESTAURANTS	39	..
ATTRACTIONS	19	--
ACTIVITIES	<b>28</b>	--
CRAFTS/GIFT SHOP	23	--

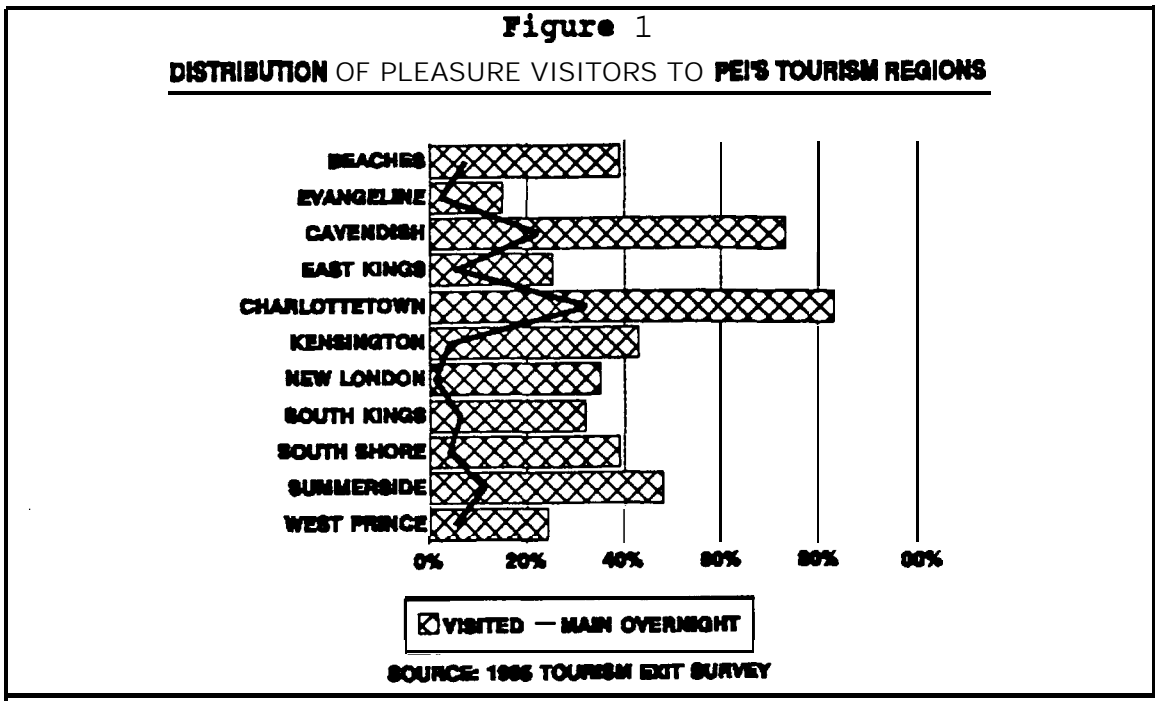
● **Includes government campgrounds**

Provincially, the Cavendish tourism region ranks first in the number of attractions (18%) and activities (19%) operators, and shares first place in its number of fixed roof accommodation operators (14%). Other than the region's share of Restaurants (8%), the **Cavendish** tourism plant is quite balanced in comparison to other tourism regions.

Given this apparent balance, future infrastructure development in the Cavendish tourism region could continue to focus on all aspects of the industry, with particular attention being given to higher end restaurants.

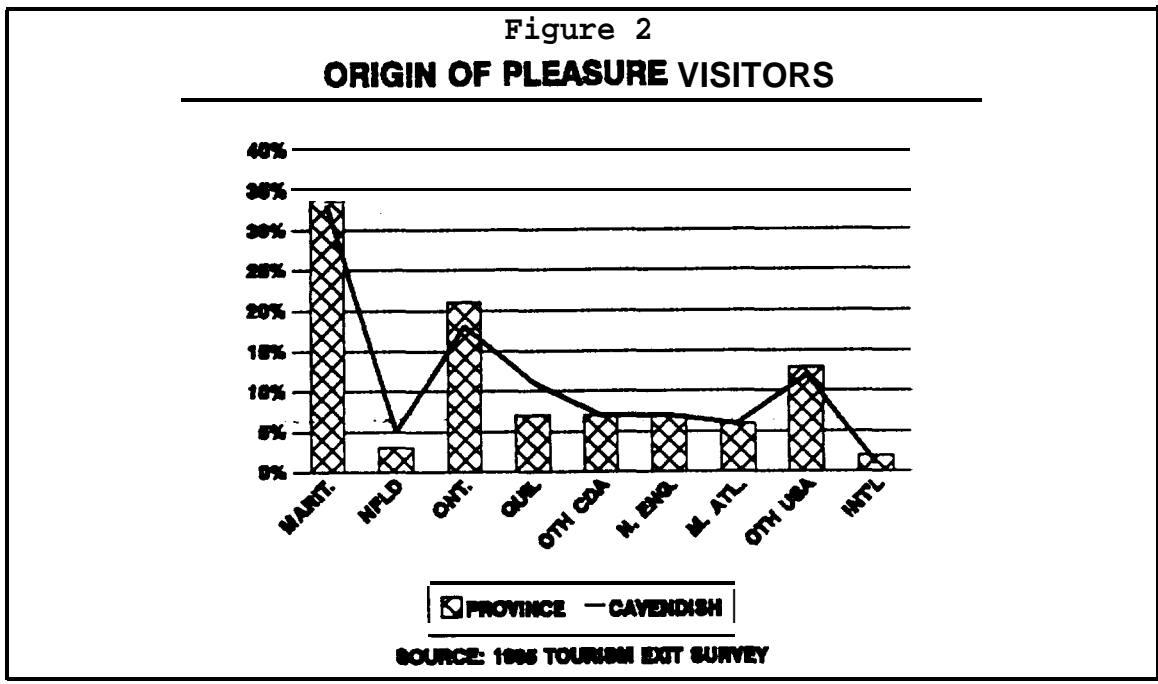
The 1995 Tourism Exit Survey concluded that 73% of all pleasure travelers to Prince Edward Island (an estimated 498,774 visitors) visited the Cavendish tourism region. Cavendish was the main overnight destination for 22% of all pleasure travelers (150,315 visitors), who stayed an average of 4.1 nights, occupying an estimated 308,146 room-nights -in-paid-and-non-paid- accommodations.

When compared to 1994 visitation, the Cavendish tourism region realized a 6% decrease in overnight pleasure travel visitations. The length of time these visitors stayed in the region also declined from 4.3 nights in 1994 to 4.1 nights in 1995.



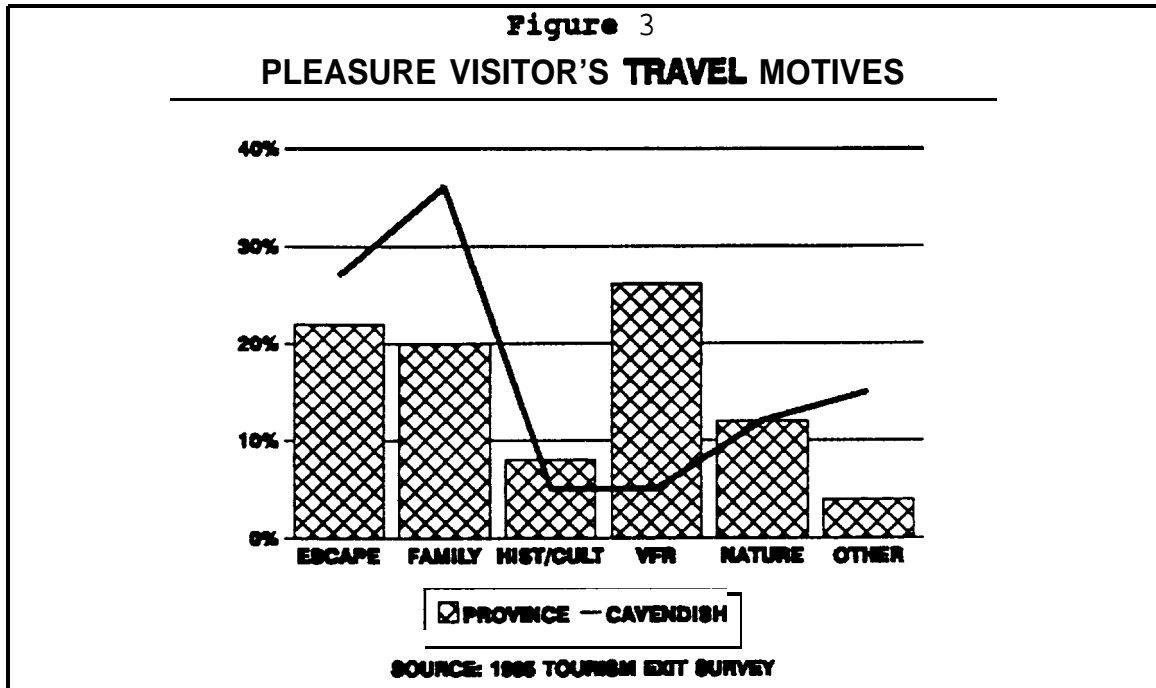
Visitor Profile

Thirty-three percent of all visitors who overnighted mainly in the Cavendish tourism region were **Maritimers**, while 24% were American pleasure travelers. Ontarians represented 18% of **visitors, while** the balance, 25%, were from other origins. Fifty-five percent of visitors who overnighted mainly in the Cavendish region were repeat visitors.

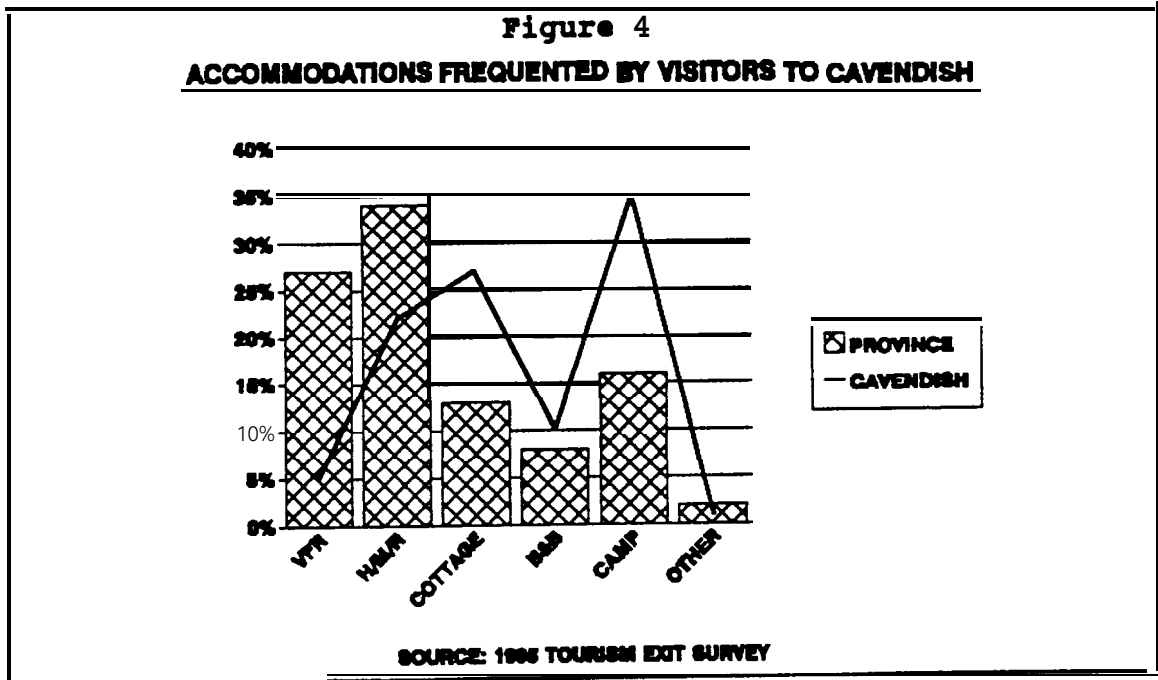




Fifty-eight percent of visitors that overnighted in the Cavendish tourism region were adult travelers, while 42% were families. The majority of visitors were 40 years of age and older (62%). Given this region's appeal to the family market, when compared to provincial norms, it is not surprising to find that 36% of visitors that overnighted in **Cavendish** travelled to experience a "family vacation," while 27% of visitors reported that their primary travel motive was escape.

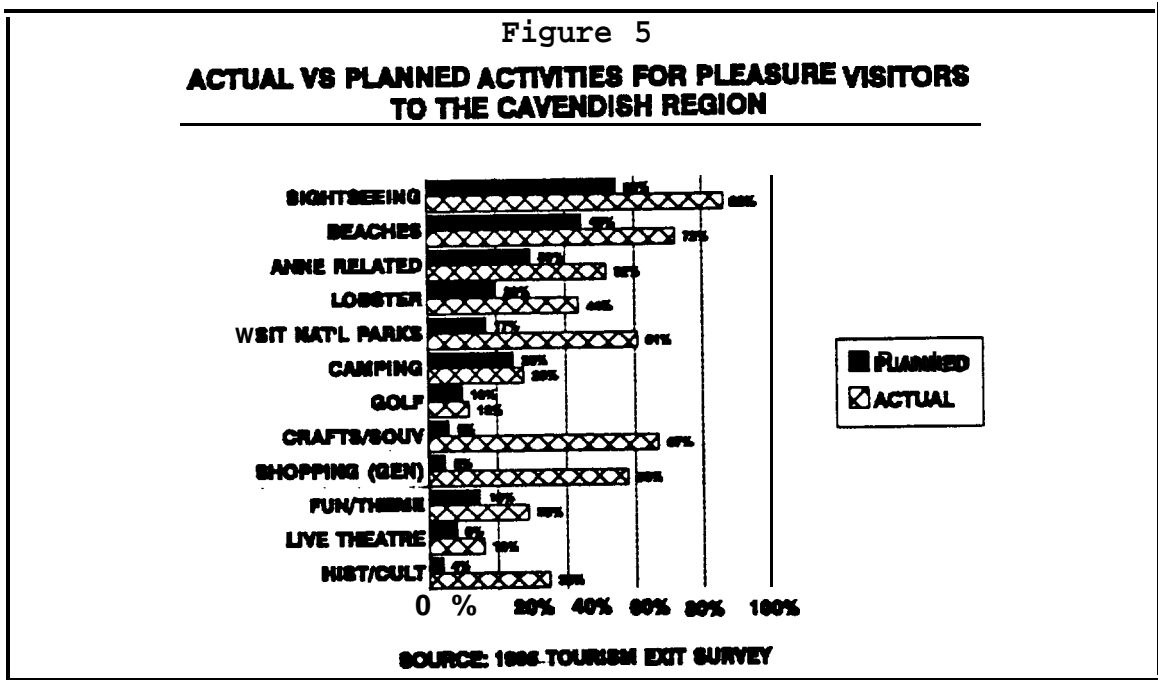


Ninety-five percent of visitors that overnighted mainly in the Cavendish tourism region stayed in paid accommodations, while 5% stayed with friends and relatives in non-paid accommodations. Sixty percent of visitors who overnighted mainly in the **Cavendish** region stayed in fixed roof accommodations, while 35% stayed in campgrounds and trailer parks. When compared to provincial standards, **Cavendish** attracted significantly more visitors who stayed in cottages and campgrounds, while attracting significantly fewer visitors who stayed in non-paid accommodations (visiting friends and relatives) .



**Visitor Activities**

Sightseeing (55%) and visiting the beaches (45%) were **the** main activities planned by visitors to the Cavendish tourism region. Other planned activities included: Anne/Lucy Maud Montgomery activities; lobster suppers; camping; visiting **fun/theme parks**; visiting 'he region's National Parks; and golf.

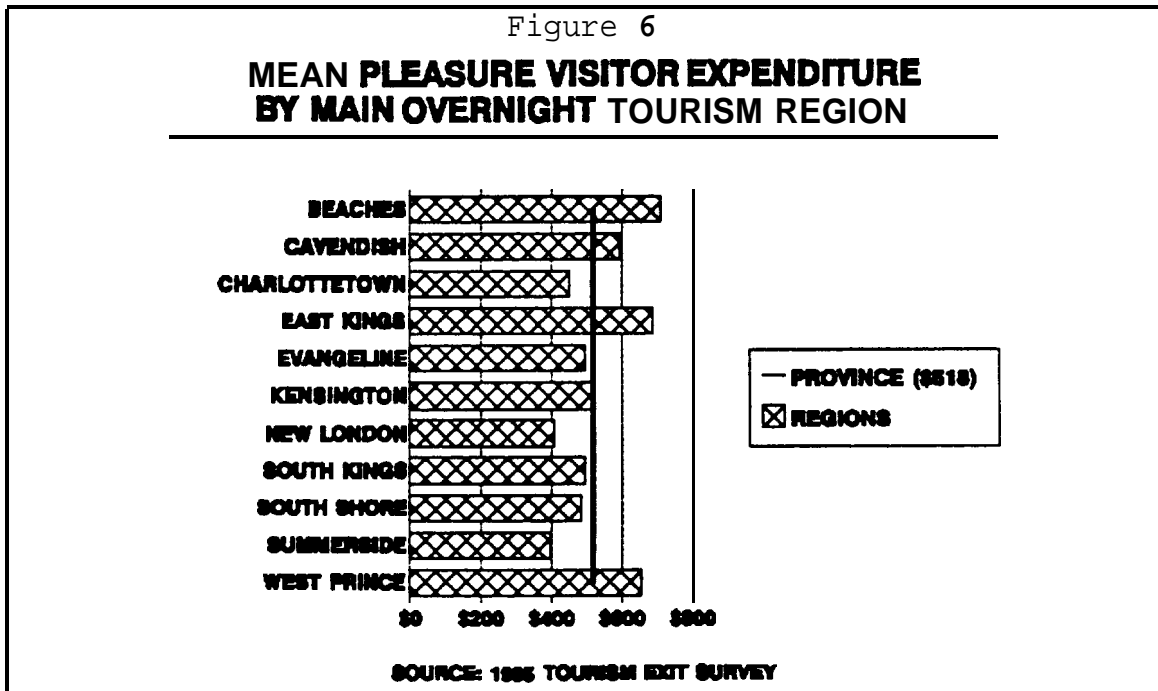


Visitors to the Cavendish region actually participated in sightseeing (86%); beach visits (72%); craft/souvenir shopping (67%); **general** merchandise shopping (67%); National Park visits (61%); and **Anne/Lucy** Maud Montgomery activities (52%) more than other activities. Given the region's apparent strength in such activities, **Cavendish** should continue to use these activities (in addition to fun/theme parks and other commercial attractions) as their primary lure pieces to entice additional visitors to the region.

Visitor Expenditures

Visitor receipts for the **Cavendish** tourism region are estimated at \$32.3 million. The mean party expenditure of those who overnighted mainly in the **Cavendish** tourism region is estimated at \$593, 14% higher than the \$518 mean party expenditure recorded for the province. This regional expenditure included an average of 2.9 people.

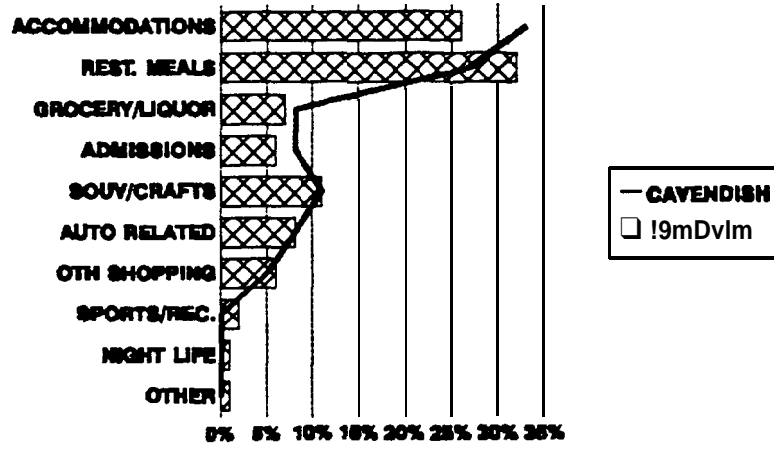
Collectively, accommodations, restaurant meals and grocery/liquor items combined, represented 69% of total expenditures, while purchases of handicrafts, souvenirs and other shopping goods accounted for 14% of expenditures. Admissions to attractions, events, sporting and recreation facilities represented 9% of spending, while automobile expenses accounted for 8% of expenditures.



When compared to provincial spending, visitors to Cavendish tended to spend more against accommodations and grocery/liquor products, while spending below provincial averages on restaurant meals. This is not surprising given the high occupancy levels for cottages and campgrounds where meal preparation is more likely to be 'in-house'.

Figure 7

**PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS**



SOURCE: 1985 TOURISM EXIT SURVEY

### (iii) THE CHARLOTTETOWN TOURISM REGION

#### Regional Tourism Plant Inventory

A 1994 Survey of Tourism Operators defined the physical infrastructure of the Charlottetown tourism plant. The strength of the Charlottetown region's tourism plant lies in its accommodation and restaurant sectors.

#### THE CHARLOTTETOWN TOURISM PLANT

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	121	1509
CAMPGROUNDS ●	2	90
RESTAURANTS	167	--
ATTRACTIONS	12	--
ACTIVITIES	26	--
CRAFTS/GIFT SHOP	25	--

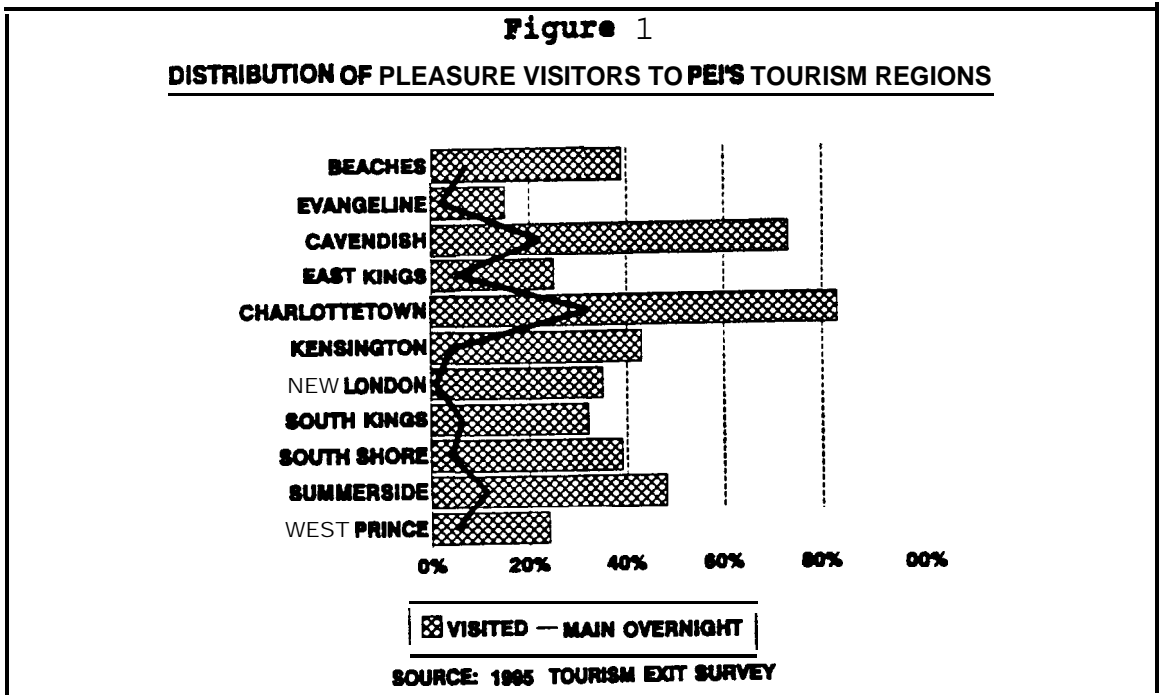
●Includes government campgrounds

Provincially, the Charlottetown area ranks first in the number of restaurant operators (40%), shares a first place ranking in fixed roof accommodation operators (14%), and ranks second in its number of activity operators (18%). The Charlottetown tourism plant is highly balanced in comparison to other tourism regions.

Given the apparent balance of this region's tourism plant, future infrastructure development should continue to focus on the establishment of additional commercial attractions. Such attractions would lure more visitors to the region and would encourage them to stay longer.

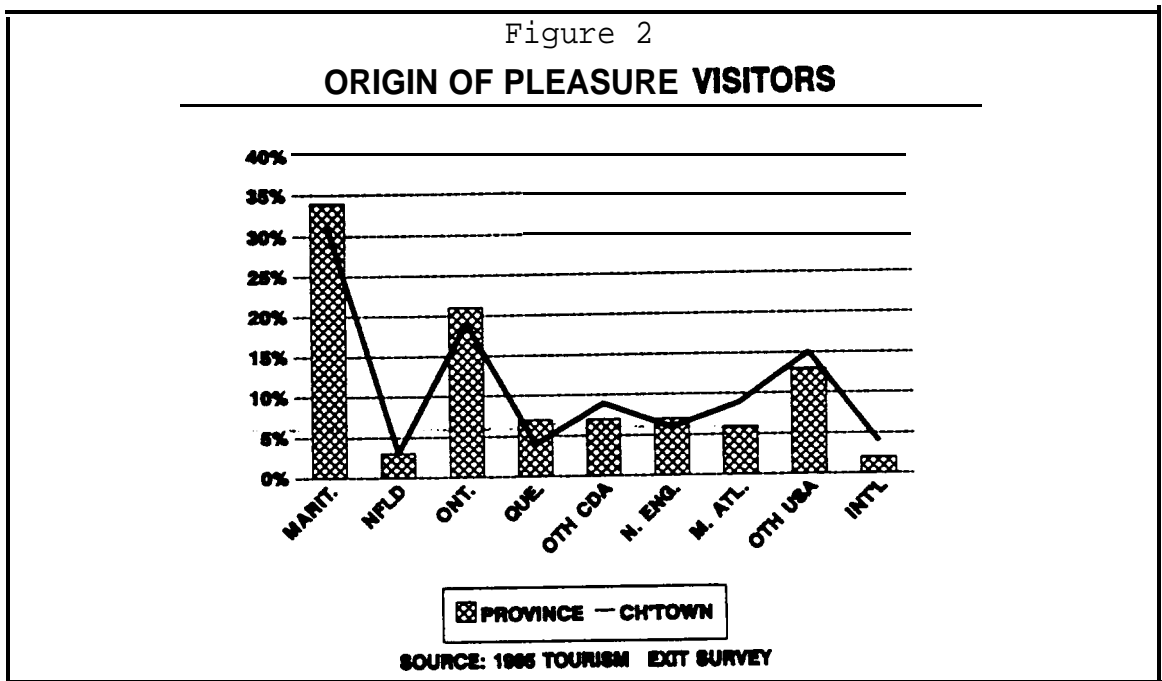
The 1995 Tourism Exit Survey concluded that 83% of all pleasure travelers to Prince Edward Island (an estimated 567,099 visitors) visited the Charlottetown area. This region was the 'mains' overnight destination for 32% of all pleasure travelers (218,640 visitors), who stayed an average **of 3.8 nights**, occupying an equivalent of 415,416 room nights in paid and non-paid accommodations.

When compared to 1994 visitation levels, the Charlottetown tourism region realized a 9% increase in overnight pleasure travel visitations. The length of time these visitors stayed overnight in the region declined marginally from 3.9 nights in 1994 to 3.8 nights in 1995.

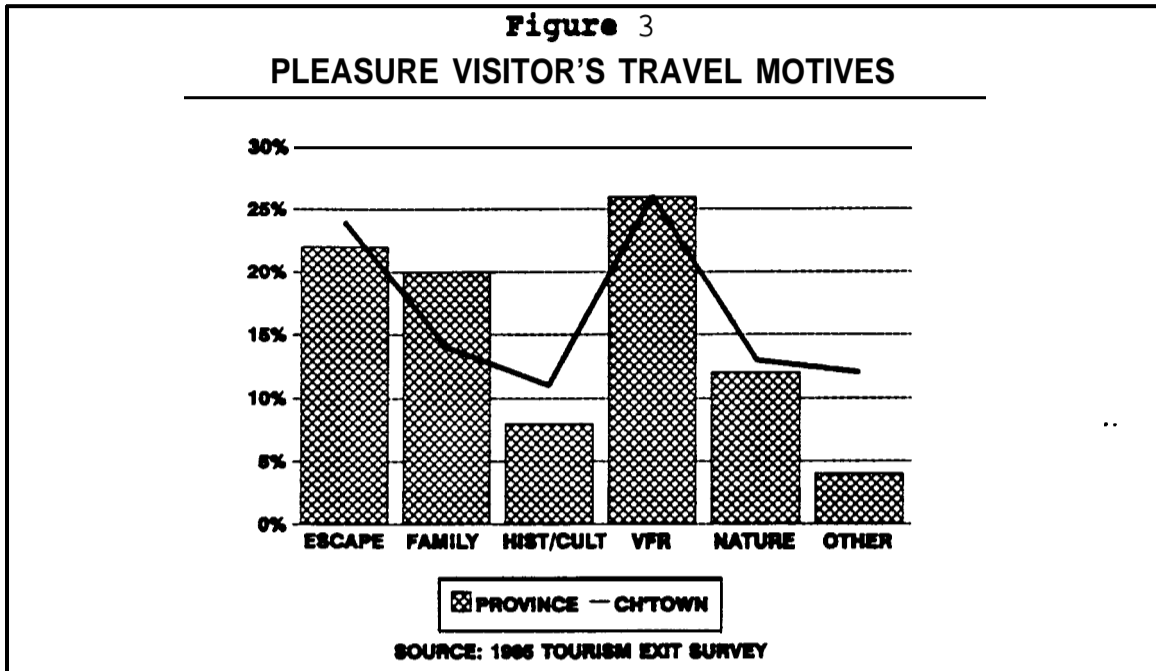


Visitor Profile

Thirty-two percent of all overnight pleasure visitors to the Charlotteto- tourism region were American pleasure travelers. Maritime pleasure travelers accounted for 31% of visitations, while Ontarians represented 19% of visitors. The balance, 18%, were visitors of other origins. Fifty-one percent of visitors who overnighted in the Charlotteto- region were repeat **visitors**.



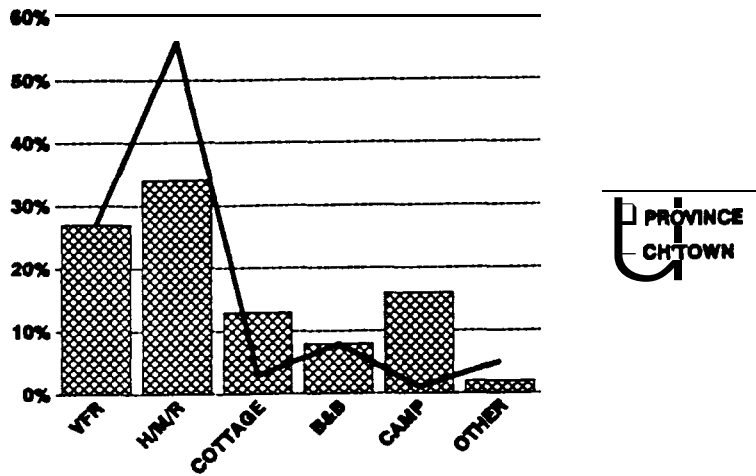
Eighty-two percent of visitors who overnighted in the Charlottetown tourism region were adult travelers, while 18% were families. The strong majority of **visitors** were over 40 years of age (76%). Given this region's appeal to the adult/couples market, it is not surprising to find that 85% of the visitors that overnighted in the Charlottetown area reported non-family travel motives. Visiting friends and relatives (26%) and escape/relaxation (24%), were the primary travel motivators of visitors to this region.



Seventy-three percent of visitors that overnighted mainly in the Charlottetown tourism region stayed in paid accommodations, with the majority (69%) staying in fixed roof facilities. Campgrounds and trailer parks were frequented by 4% of this region's paid accommodation visitors. Twenty-seven percent of visitors to the Charlottetown tourism region stayed with friends and relatives in **non-**paid accommodations. When compared to provincial standards, Charlottetown attracted significantly more hotel/motel vacationers, while attracting significantly fewer cottage and campground travelers, a natural reflection of the physical infrastructure of accommodations in the Charlottetown area.

Figure 4

**ACCOMMODATIONS FREQUENTED BY VISITORS TO CHARLOTTETOWN**



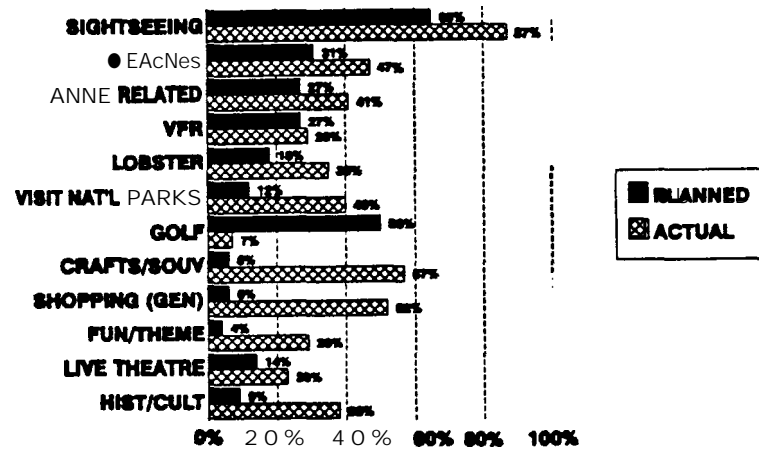
SOURCE: 1996 TOURISM EXIT SURVEY

Visitor Activities

Sightseeing (65%), Golf (50%), beach visits (31%) and Anne/Lucy Maud Montgomery activities (27%) were the top four activities planned by visitors to the Charlottetown tourism region. Other planned activities included: visiting friends and relatives; lobster suppers; and live theatre.

Figure 5

**ACTUAL VS PLANNED ACTIVITIES FOR PLEASURE VISITORS TO THE CHARLOTTETOWN REGION**



SOURCE: 1996 TOURISM EXIT SURVEY

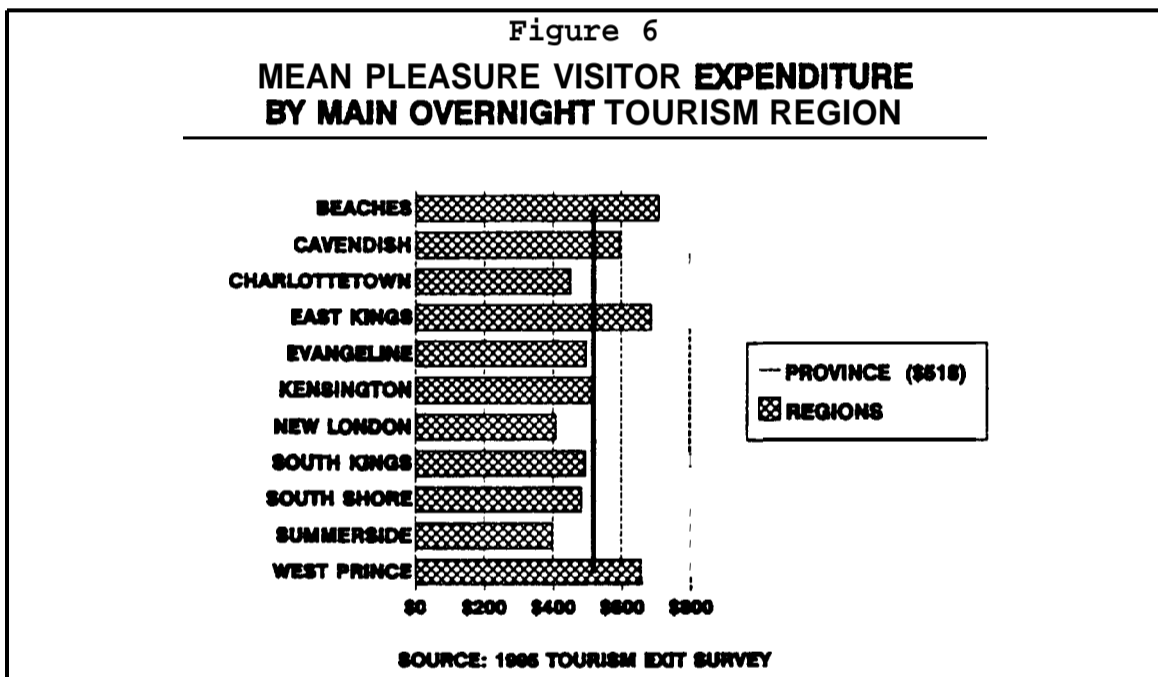


Visitors to the Charlottetown region actually participated in sightseeing (87%) , craft/souvenir shopping (57%), general merchandise shopping (52%) , beach visits (47%), and Anne/Lucy Maud Montgomery (41%) activities more than other activities. Given the region's apparent strength in such activities, these activities (supplemented by world class accommodations, fine dining and the region's history and culture) should continue to serve as lure pieces to entice more visitors to the Charlottetown region.

**Visitor Expenditures**

Visitor receipts for the Charlottetown tourism region are estimated at \$46.9 million. The mean party expenditure by those who overnighed mainly in the **Charlottetown** area is estimated at \$452, 13% below the \$518 mean party expenditure recorded for the province. This may, in part, be due to higher **VFR** visitors (27% in non-paid accommodations). This expenditure included an average of 2.2 people.

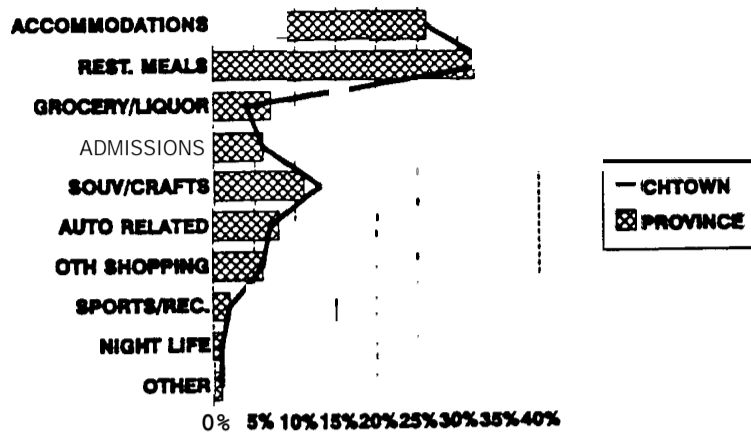
Collectively, accommodations, restaurant meals and grocery/liquor purchases represented 64% of total expenditures, while purchases of handicrafts, souvenirs and other shopping goods represented 20% of expenditures. Automobile expenses plus admissions to attractions/events/sport and recreation amenities accounted for a further 15% of spending. The balance of visitor expenditures (1%) were against nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to the Charlottetown tourism region tended to spend more against restaurant meals and crafts/souvenirs, while spending below provincial averages on grocery/liquor purchases and automobile expenses.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS



SOURCE: 1986 TOURISM EXIT SURVEY

## (iv) EASTERN ICINGS TOURISM REGION

### Regional Tourism Plant Inventory

A 1994 Survey of Tourism Operators defined the physical infrastructure of the Eastern Kings tourism plant. The strength of the Eastern Kings region's tourism plant lies in its fixed roof accommodations and restaurant sectors.

#### THE EASTERN KINGS TOURISM PLANT

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	76	272
CAMPGROUNDS*	3	168
RESTAURANTS	25	..
ATTRACTIONS	6	--
ACTIVITIES	15	--
CRAFTS/GIFT SHOP	14	--

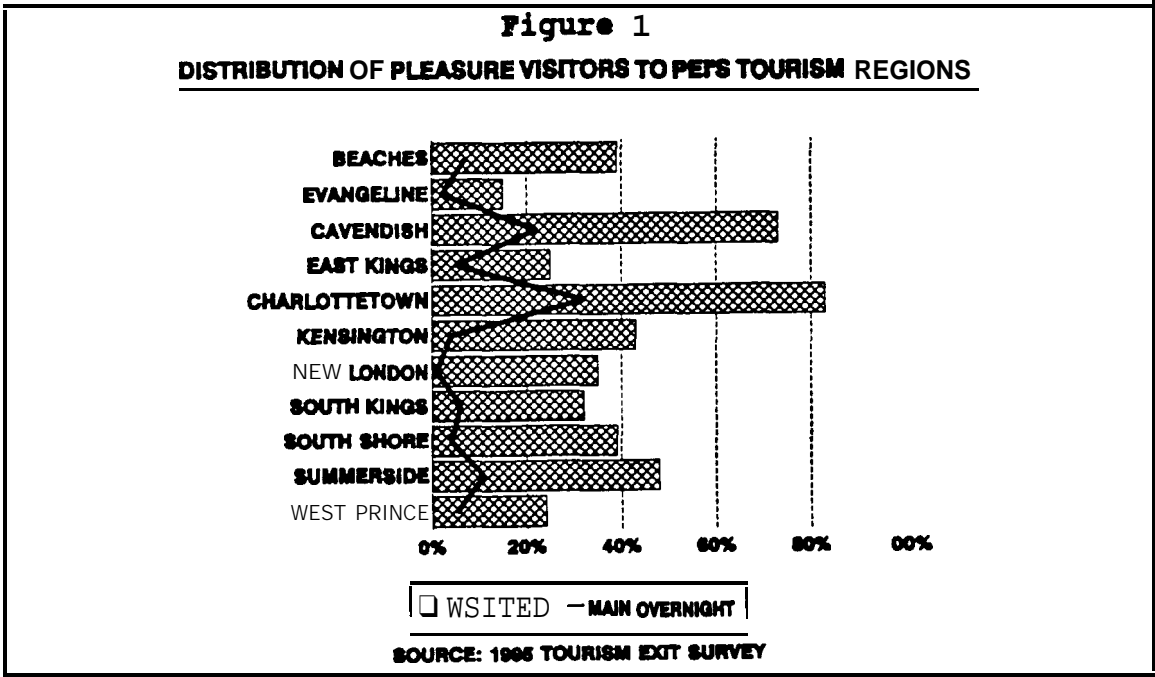
- Includes government campgrounds

Provincially, Eastern Kings ranks fourth in the number of activity operators (10%) and ranks sixth or lower in all other components of its tourism plant. Eastern Kings accounts for 9% of all provincial fixed roof accommodation operators, 6% of attractions and 5% of restaurants.

While the region is relatively balanced in terms of infrastructure distribution, its share of the provincial tourism plant is relatively low. Future infrastructure developments should be directed toward the expansion of attractions and activities, given its very high **VFR** traffic (44%).

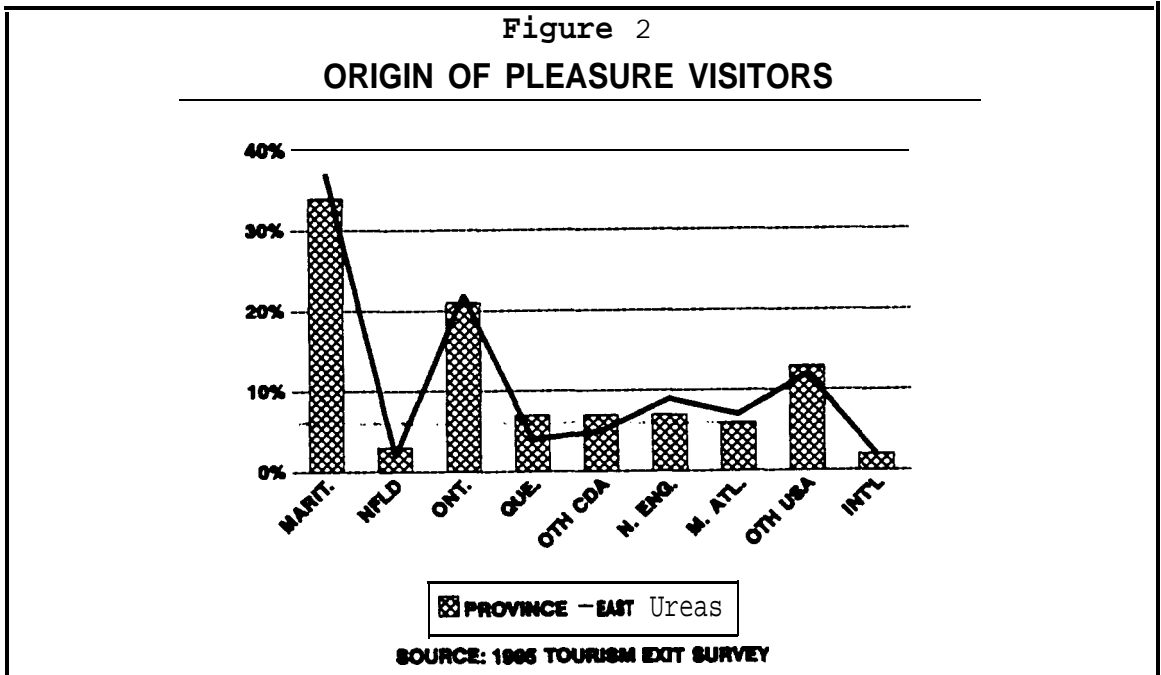
The 1994 Tourism Exit Survey concluded **that** 25% of all pleasure travelers to Prince Edward Island (an estimated 170,813 visitors) visited the Eastern Kings tourism region. This region was the main overnight destination-far **5% of all-pleasure- travelers (34,163** visitors) , who stayed an average of 7.8 nights, occupying an equivalent of 133,236 room nights in paid and non-paid accommodations.

When compared to 1994 visitation levels, the Eastern Kings tourism region realized a 2% increase in overnight pleasure travel visitations. The length of time these visitors stayed overnight in the region increased from 6.3 nights in 1994 to 7.8 nights in 1995.

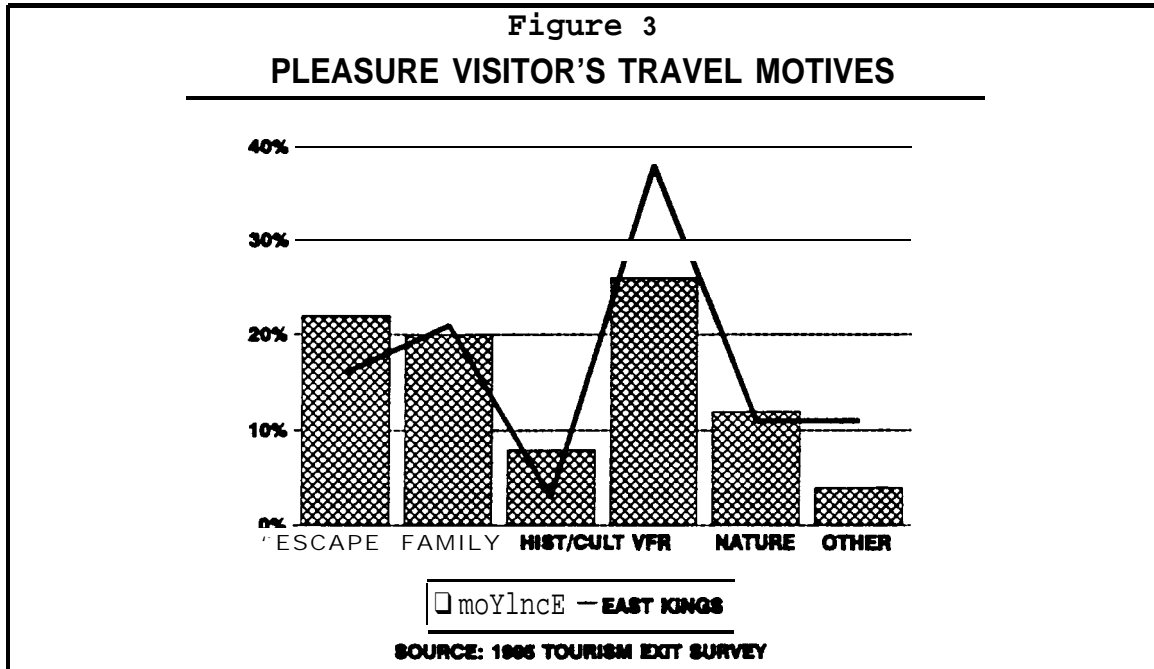


**Visitor Profile**

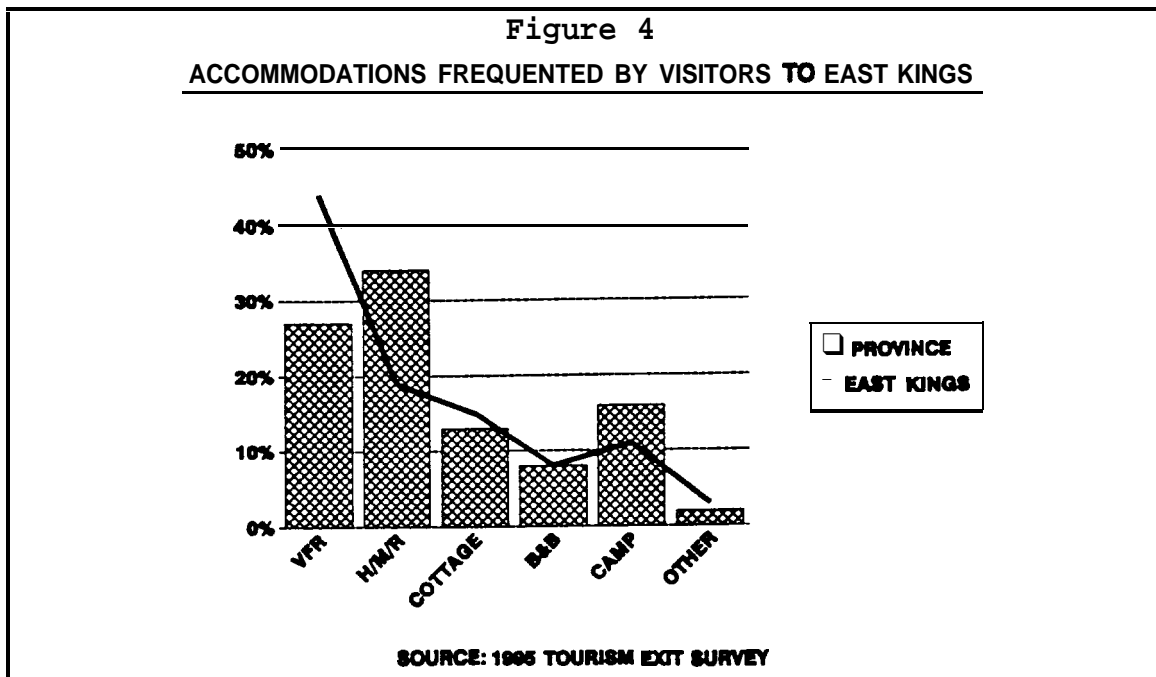
Thirty-two percent of all overnight pleasure travelers to Eastern Kings were American pleasure travelers, while 25% were Maritime pleasure travelers. Ontarians and Quebecers represented 22% and 6% of pleasure travelers respectively. The balance of visitors (15%) were from other origins. Sixty-seven percent of visitors who overnightsed mainly in the Eastern Kings region were repeat visitors. Repeat visitation in Eastern Kings is significantly higher than the provincial norm (59%), and may be a reflection of a strong VFR (versus paid accommodations) traffic.



Sixty-seven percent of the visitors who overnighted in the Eastern Kings tourism region were adult travelers and 33% were families. The majority of these visitors (73%) were over 40 years of age. Given this region's appeal to the adult couples market, it is not surprising to find that 79% of visitors that overnighted mainly in Eastern Kings reported non-family travel motives. Visiting friends and relatives (38%) and relaxation and escape (16%) were primary travel motivators for these visitors.

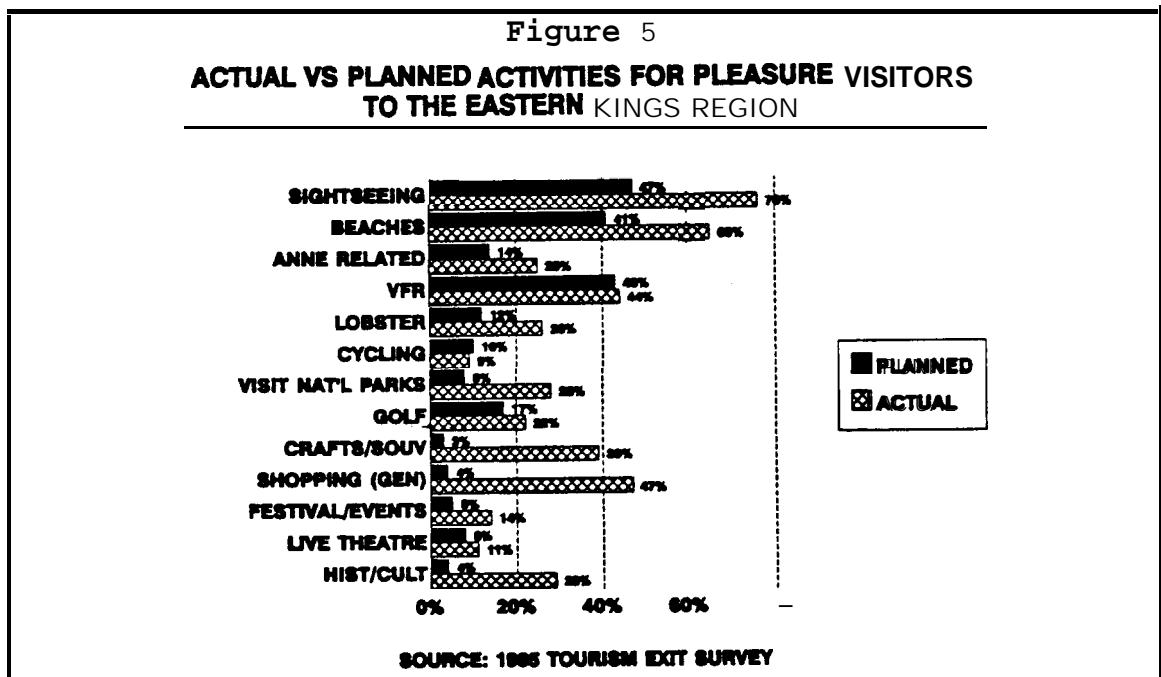


Forty-four percent of visitors that overnighted in the Eastern Kings tourism region stayed in non-paid accommodations. Forty-four percent stayed in fixed roof accommodations, while 12% stayed in private or government operated campgrounds. When compared to provincial norms, Eastern Kings attracted-significantly more VFR (visiting friends and relatives) vacationers, while hosting fewer campground and hotel/motel visitors.



**Visitor Activities**

Sightseeing (47%), visiting friends and relatives (43%), visiting the beaches (41%), and golf (17%) were the main activities planned by visitors to Eastern Kings. Other planned activities included: visiting Anne/Lucy Maud Montgomery sites and lobster suppers.

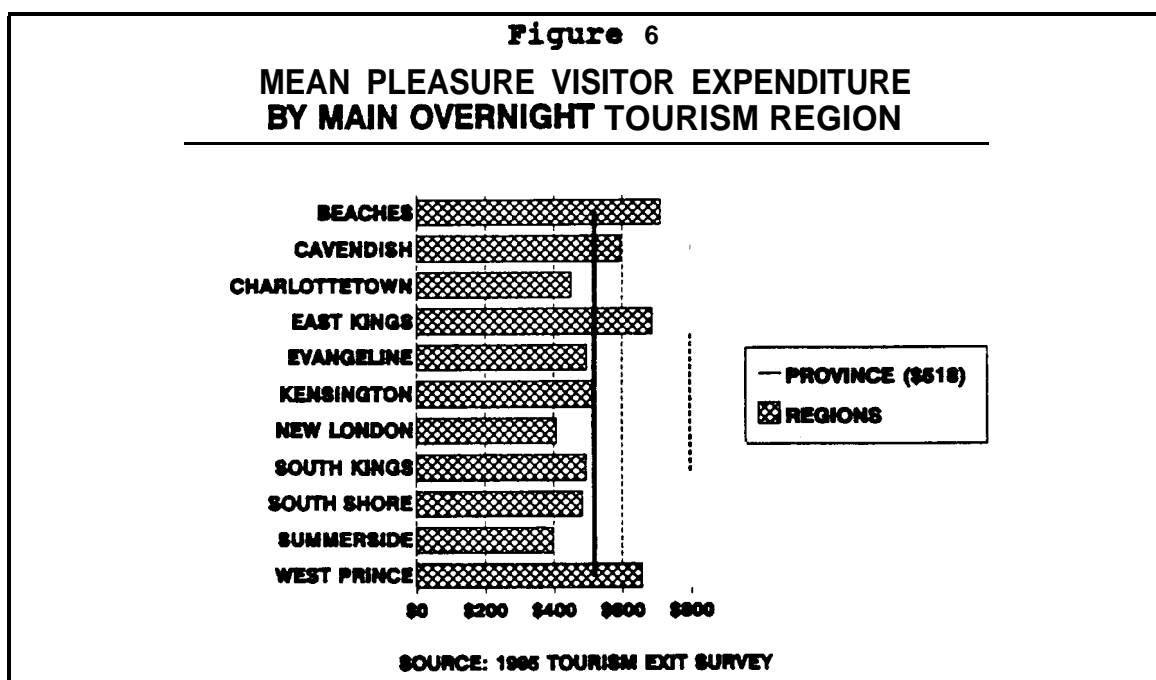


Visitors to Eastern Kings actually participated in sightseeing (76%) and beach visits (65%), more than other activities. Sightseeing, beaches and golf should continue to serve as this region's primary lure pieces, when developing advertising creative to entice additional visitors to Eastern Kings.

### Visitor Expenditures

Visitor receipts for the Eastern Kings tourism region are estimated at \$7.3 million. The mean party expenditure by those who overnighed mainly in Eastern Kings is estimated at \$687, 32% above the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.5 people.

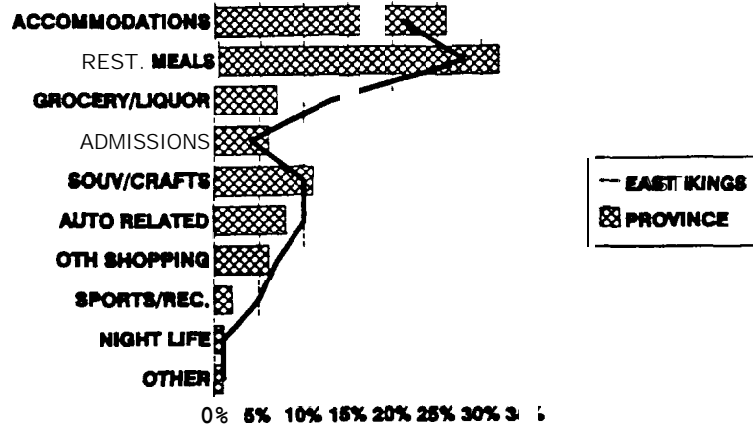
Collectively, accommodations, restaurant meals and grocery/liquor purchases combined, represented 62% of total expenditures: while purchases of handicrafts, souvenirs and other shopping goods represented 17% of expenditures. Automobile expenses and admissions to attractions/events/sport and recreation amenities accounted for a further 19% of spending. The balance of visitor expenditures (2%) were on nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to Eastern Kings tended to spend more on grocery/liquor purchases, other shopping goods and automobile expenses. These visitors also tended to **spend** below provincial **averages** on accommodations, restaurant meals, admissions, crafts and souvenirs.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES ON VARIOUS TOURISM PRODUCTS



SOURCE: 1996 TOURISM EXIT SURVEY



(v) EVANGELIZE TOURISM REGION

**Regional Tourism Plant Inventory**

A 1994 Survey of Tourism Operators defined the physical infrastructure of the Evangelize tourism plant. The strengths of the Evangelize region's tourism plant rests with **its** fixed roof accommodations and restaurant operators.

**THE EVANGELINE TOURISM PLANT**

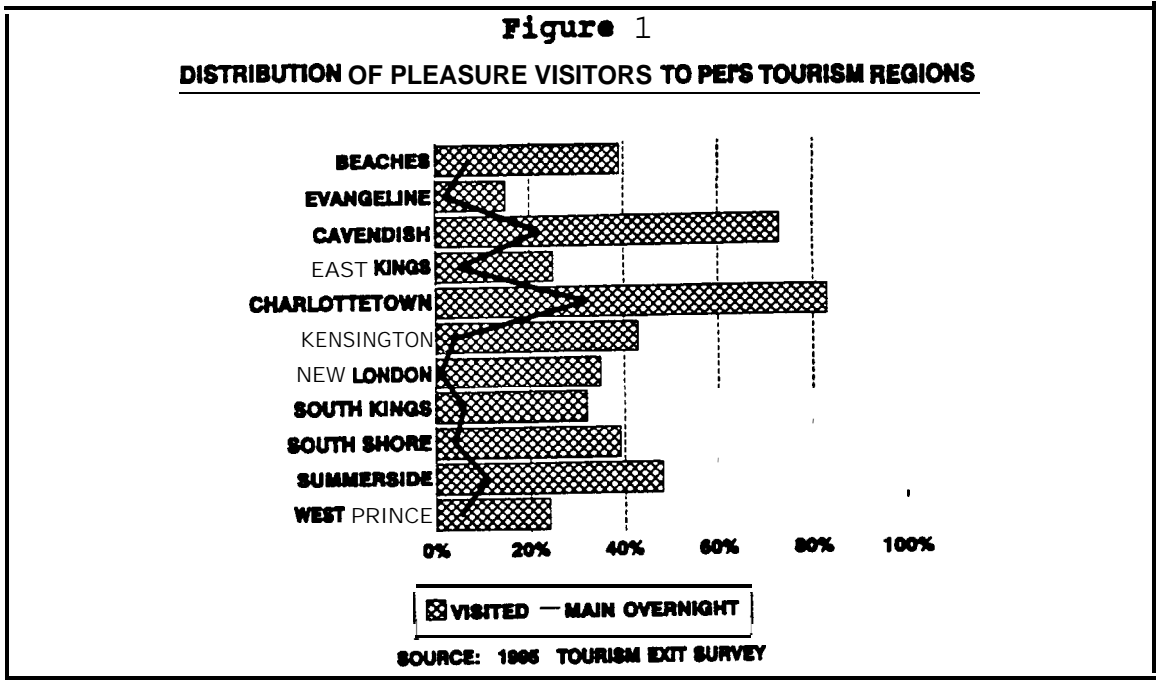
	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	13	90
CAMPGROUNDS ●	1	100
RESTAURANTS	6	--
ATTRACTIONS	4	--
ACTIVITIES	2	--
CRAFTS/GIFT SHOP	8	--

●Includes government campgrounds

While the region is relatively balanced in terms of infrastructure distribution, its share of the total provincial plant is significantly lower than that of other tourism regions. Future development could be directed toward all tourism related products.

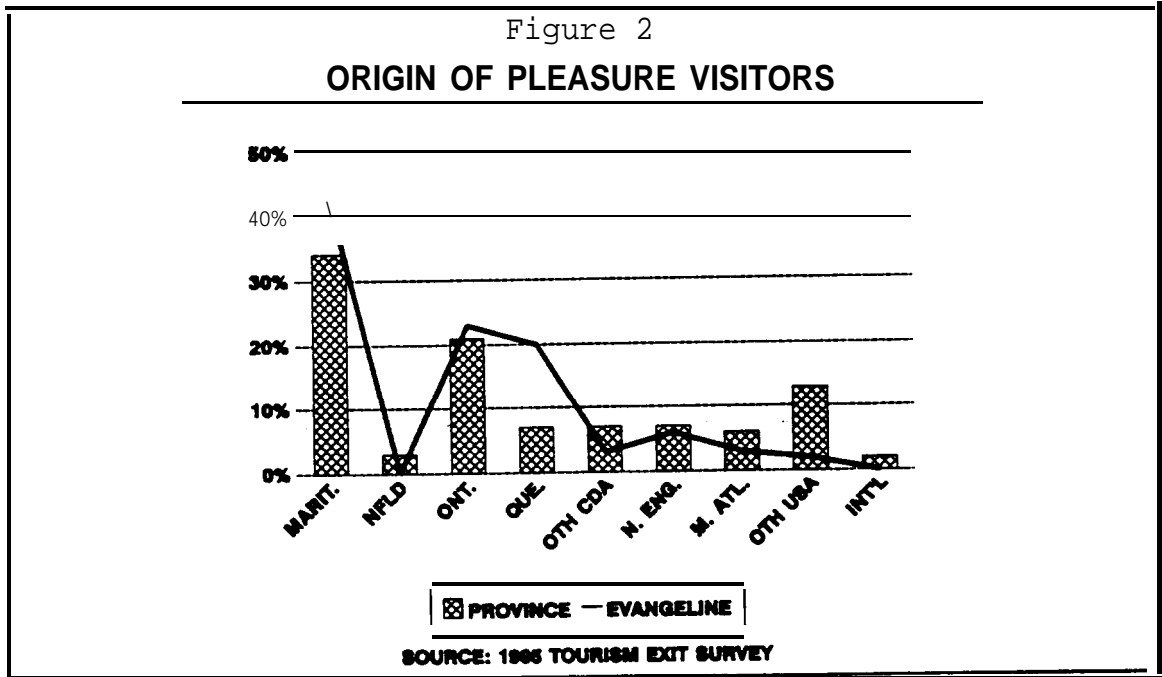
The 1995 Tourism Exit **Survey** concluded that 15% of all pleasure travelers to Prince Edward Island (an estimated 102,488 visitors) visited the Evangelize region. This region was the "main" overnight destination for 2% of all pleasure travelers (13,665 visitors), who stayed an average of 5.7 nights, occupying an equivalent of 38,945 room nights in paid and non-paid accommodations.

When compared to 1994 visitations, the Evangelize tourism region realized a 104% increase in overnight pleasure visitations. The length of time pleasure visitors stayed in the region decreased marginally from **6.2-nights in -1994** to **5.7-nights** in 1995.

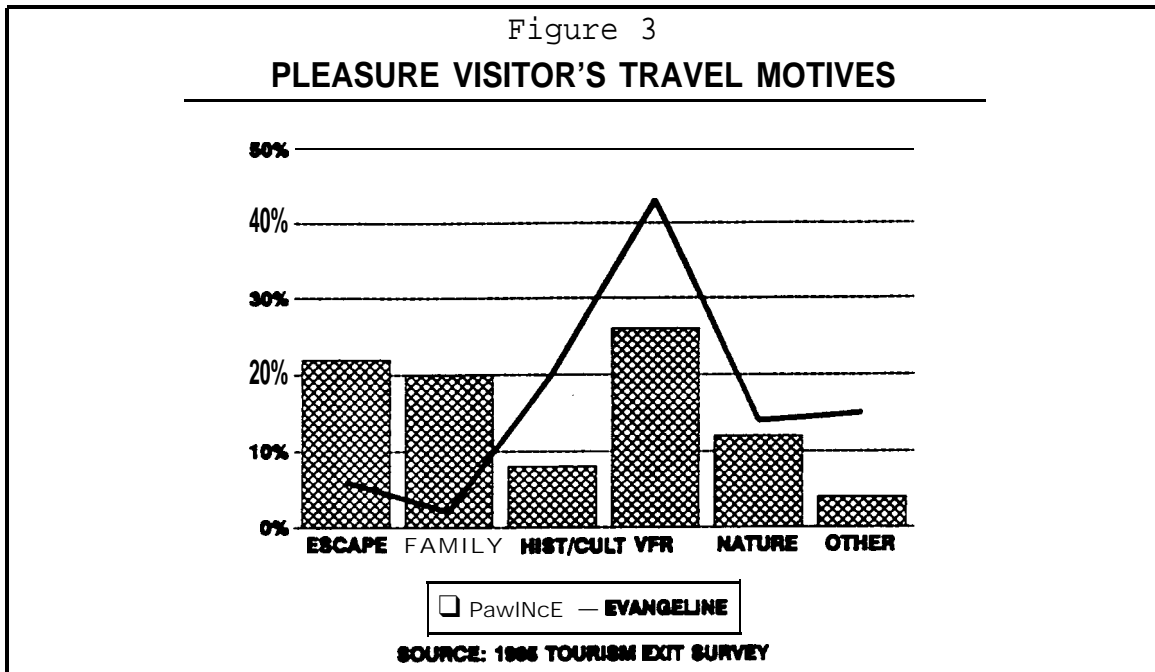


### Visitor Profile

Forty-three percent of all overnight pleasure travelers to the Evangelize area were Maritimers, while 23% were **Ontarian** vacationers. **Quebecers** represented 20% of all pleasure travelers to this region, while Americans accounted for 11% of visitations. Seventy-seven percent of all visitors who overnightsed mainly in the Evangelize tourism region were repeat visitors. This compares very favorably with provincial norms of repeat visitation (59%), and may reflect individual operators' more aggressive repeat visitation marketing initiatives.-

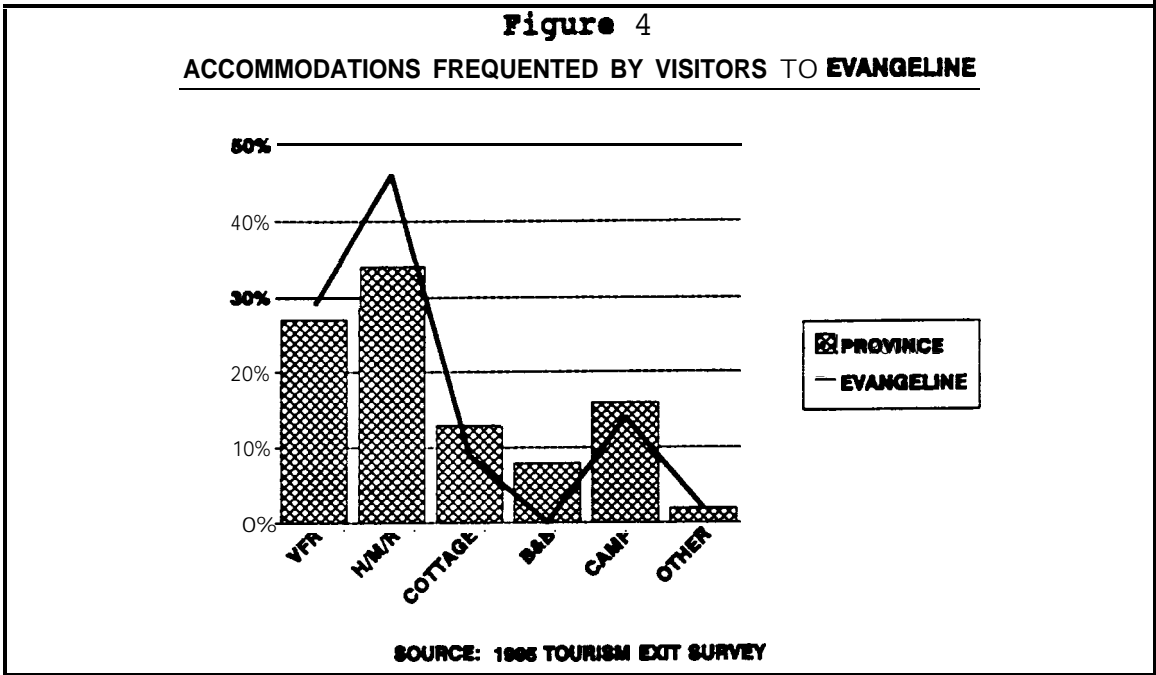


Eighty-three percent of visitors that overnighted in the Evangelize tourism region were adult travelers and 17% were families. The strong majority of these visitors were over 40 years of age (79%). Given this **region's** appeal to the adult market, it is not surprising to find that 97% of visitors that overnighted mainly in the Evangelize area, reported non-family travel motives. Visiting friends and relatives (43%), history and culture (20%), and experiencing nature (14%) were primary travel motivators for these visitors.



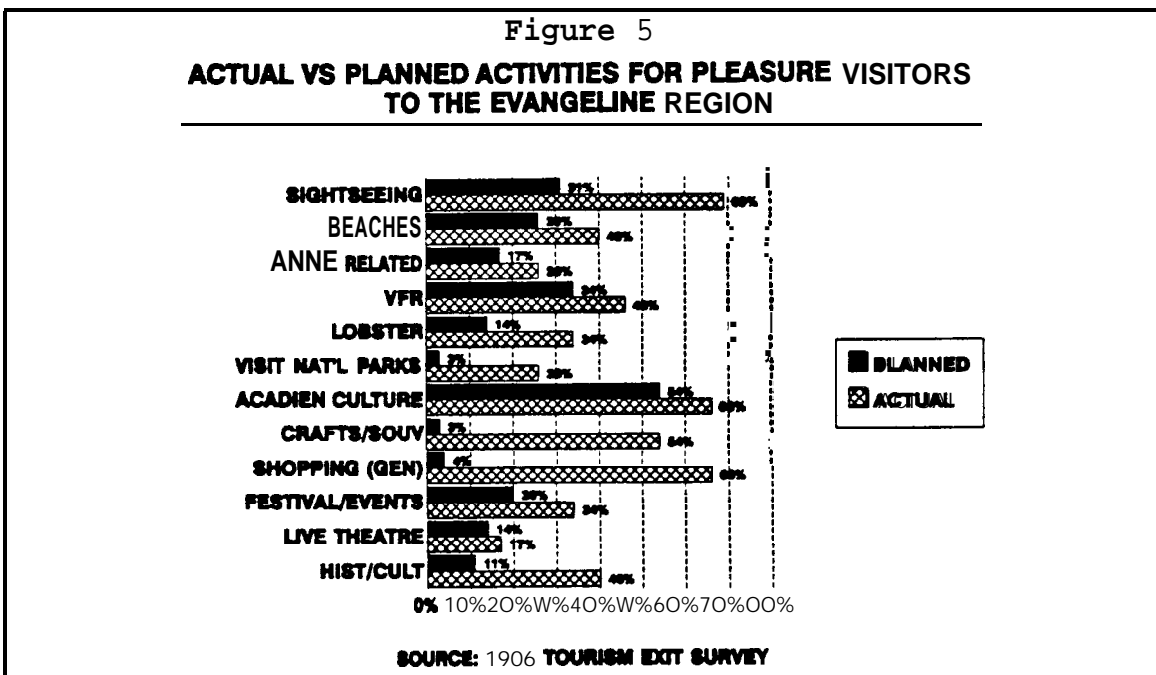
The Evangelize tourism region offers a strong historical and cultural tourism product and is a softer escape and family vacation product when compared to provincial norms.

Seventy-one percent of visitors that overnighted in the Evangelize tourism region stayed in paid accommodations, with 57% staying in fixed roof facilities and 14% staying in private and government campgrounds. Twenty-nine percent of all pleasure visitors to the Evangelize region stayed in non-paid accommodations. When compared to provincial norms, the Evangelize region tended to attract significantly more **VFR** visitors and travelers who stayed in hotels and motels. The Evangelize region attracted fewer cottage, bed and breakfast and camping visitors.



**Visitor Activities**

The Acadian culture (54%), visiting friends and relatives (34%) and sightseeing (31%) were the main activities planned by visitors to the Evangeline region. Other planned activities included beach visits, attending festivals and events, and lobster suppers.

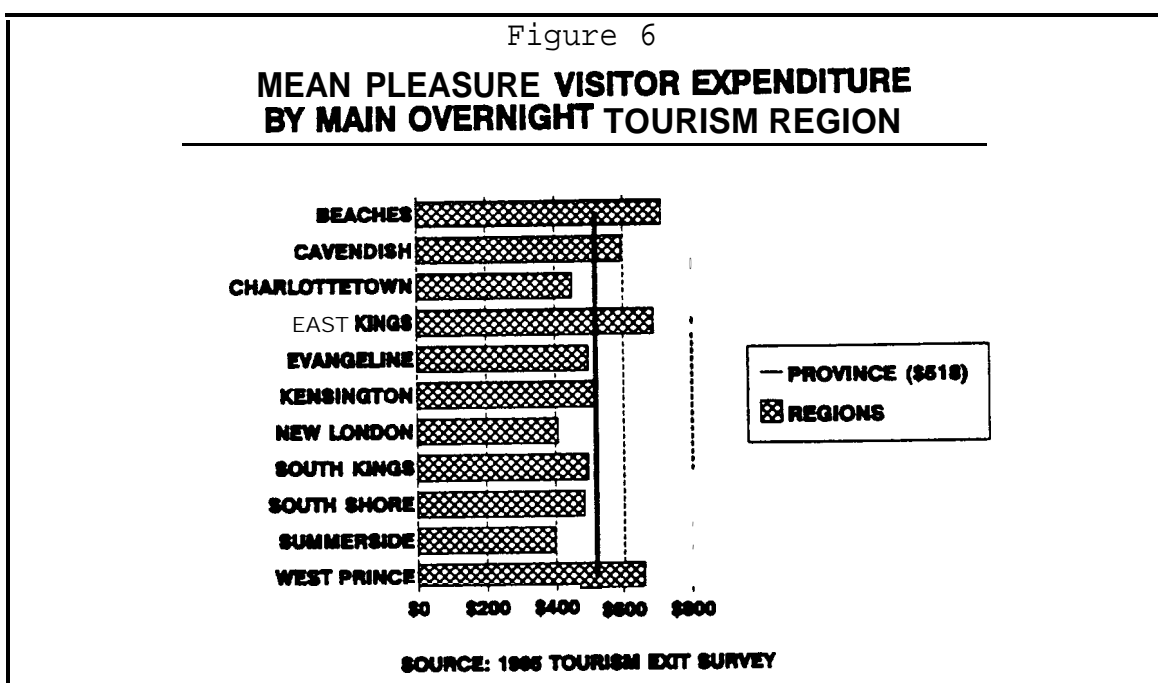


Visitors to the Evangelize region tended to actually participate in sightseeing (69%), Acadian Culture (66%), and shopping (66%) more than other activities. Until other commercial and non-commercial attractions are developed, the rich history and culture of the Evangelize region should continue as the main lure piece to entice additional visitors to the Evangelize region.

Visitor Expenditures

Visitor receipts for the Evangelize tourism region are estimated at \$2.9 million. The mean party expenditure by those who overnighed mainly in the Evangelize tourism region is estimated at \$497, 4% lower than the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.3 people.

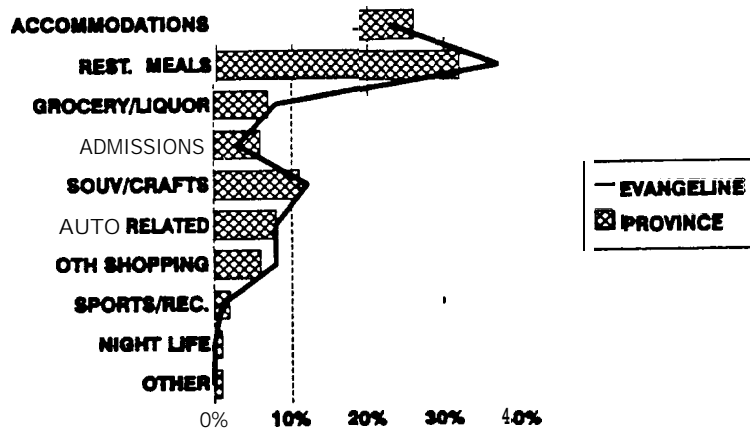
Collectively, accommodations, restaurant meals and **grocery/liquor** purchases represented 68% of total expenditures, while automobile expenses, admissions to **attractions/events/sport** and recreation amenities accounted for a further 12% of spending. Purchases of handicrafts, souvenirs and other shopping goods represented 11% of expenditures, while the balance of visitor spending, 9%, was on nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to the Evangelize region tended to spend more on restaurant meals and general merchandise shopping, while spending less on accommodations and admissions.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS



SOURCE: 1988 TOURISM EXIT SURVEY

## (vi) KENSINGTON TOURISM REGION

### Regional Tourism Plant Inventory

A 1994 Survey of Tourism Operators defined the physical infrastructure of the Kensington tourism plant. The strengths of the Kensington region's tourism plant rests with its fixed roof accommodations and restaurant operators.

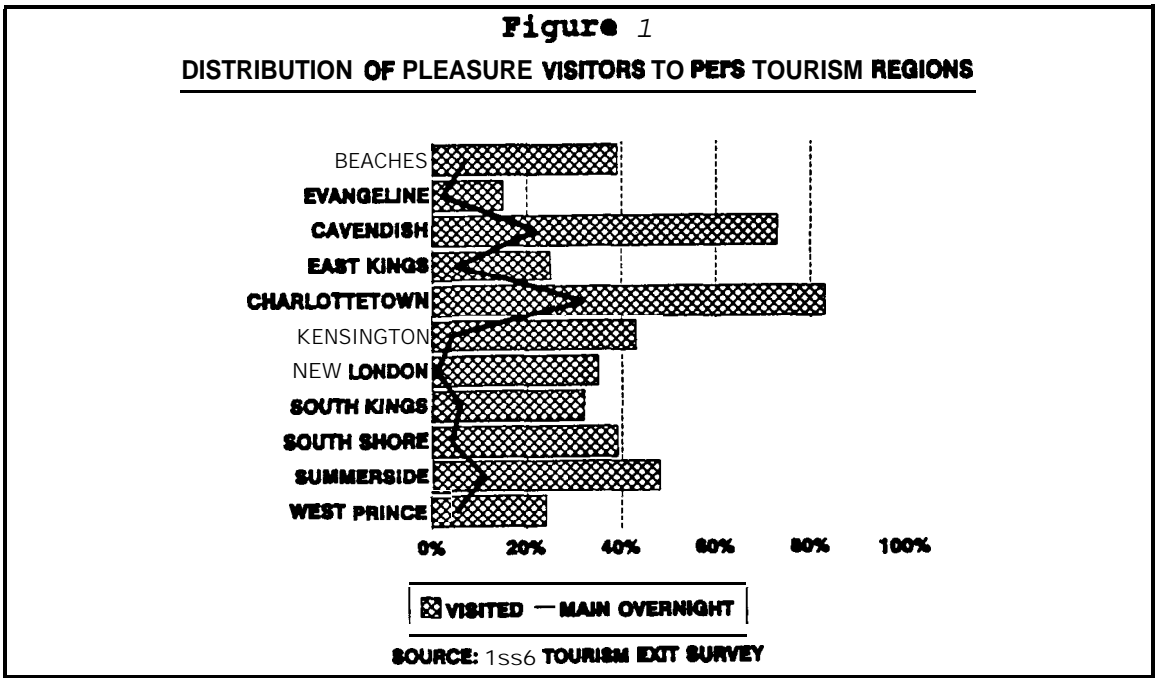
#### THE KENSINGTON TOURISM PLANT

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	81	277
CAMPGROUNDS *	5	623
RESTAURANTS	30	--
ATTRACTIONS	11	--
ACTIVITIES	8	--
CRAFTS/GIFT SHOP	9	--

\* Includes government campgrounds

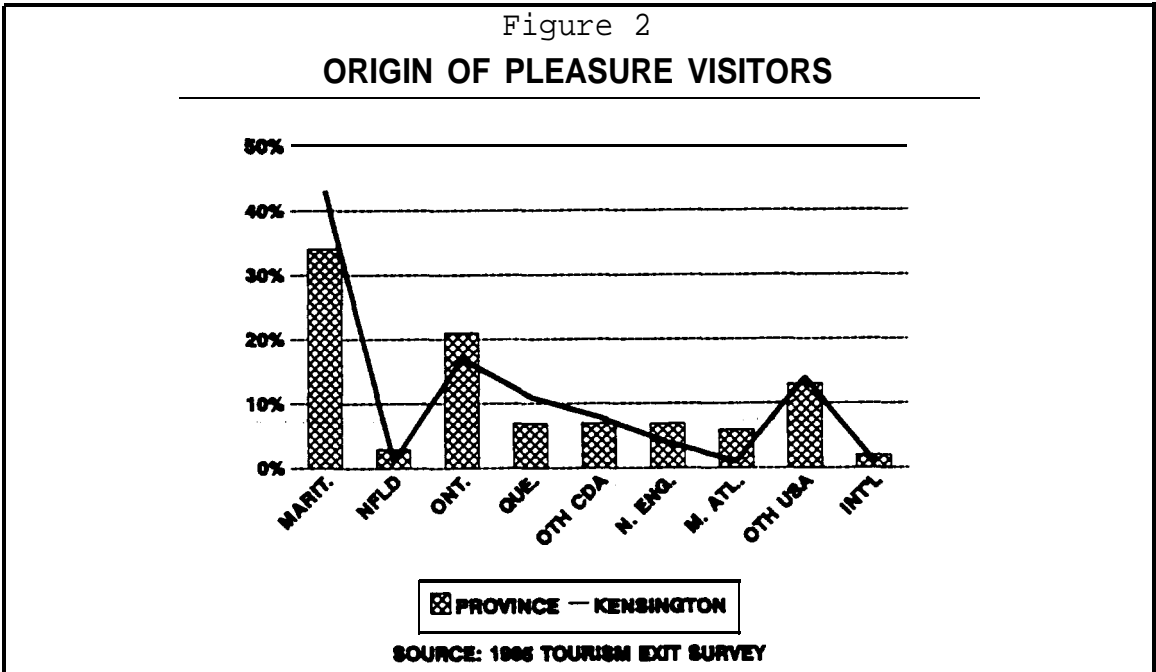
The 1994 Tourism Exit Survey concluded that 43% of all pleasure travelers to Prince Edward Island (an estimated 293,798 visitors) visited the Kensington region. This region was the "main" overnight destination for 4% of all pleasure travelers (27,330 visitors), who stayed an average of 5.5 nights, occupying an equivalent of 75,158 room nights in paid and non-paid accommodations.

When compared to 1994 visitations, the Kensington tourism region realized a 2% increase in overnight pleasure visitations. The length of time pleasure visitors stayed in the region decreased from 6.9 nights in 1994 to 5.5 nights in 1995.



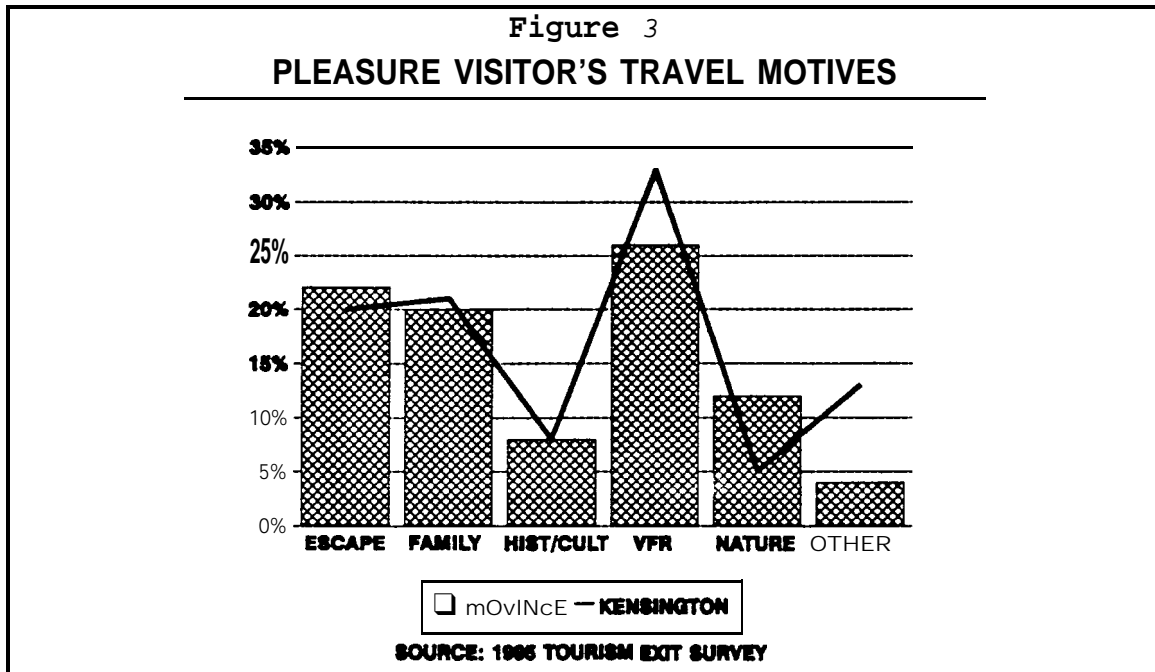
**Visitor Profile**

Forty-three percent of all overnight pleasure travelers to the Kensington area were Maritime pleasure travelers, while 19% of overnight visitors were Americans. Ontario and **Quebecers** represented 17% and 11% of overnight pleasure travelers respectively. The balance, 10%, were from other origins. Seventy-three percent of all visitors who overnights in the Kensington tourism region were repeat visitors.

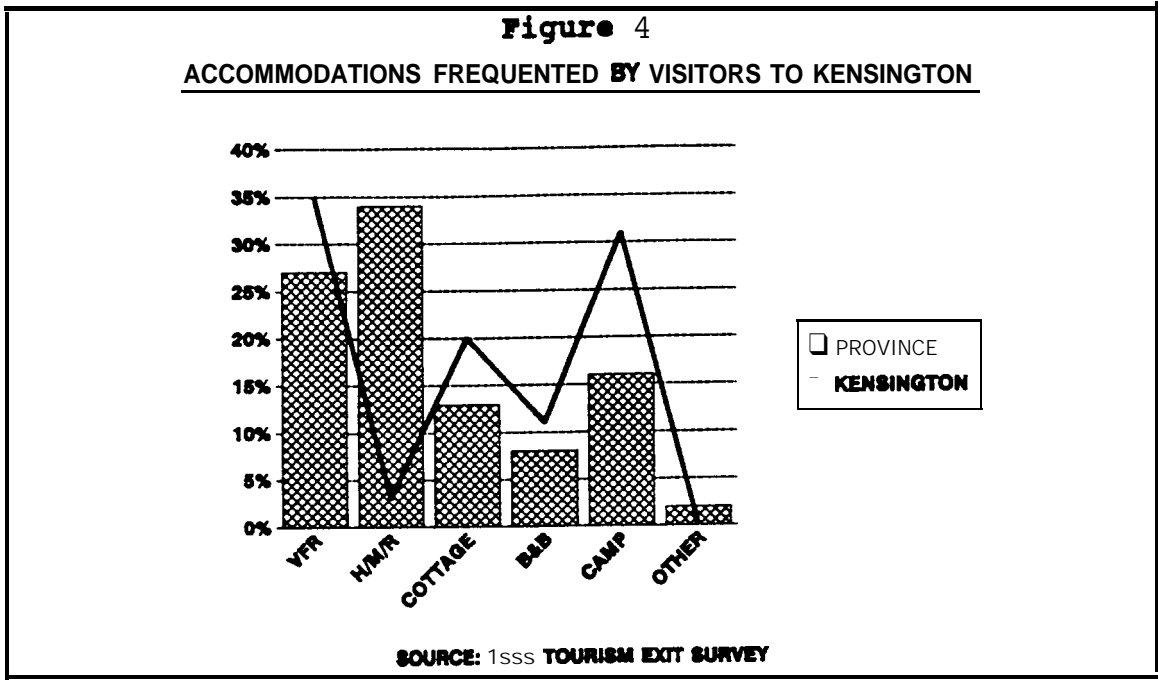




sixty-nine percent of visitors who overnighted in the Kensington tourism region were adult travelers, while the balance, 31%, were families. The majority of these visitors were over 40 years of age (71%). Given this region's appeal to the adult couples market, it is not surprising that 79% of visitors that overnighted in the Kensington area reported non-family travel motives. Visiting friends and relatives (33%), and relax and escape (20%) were primary travel motivators for these visitors.

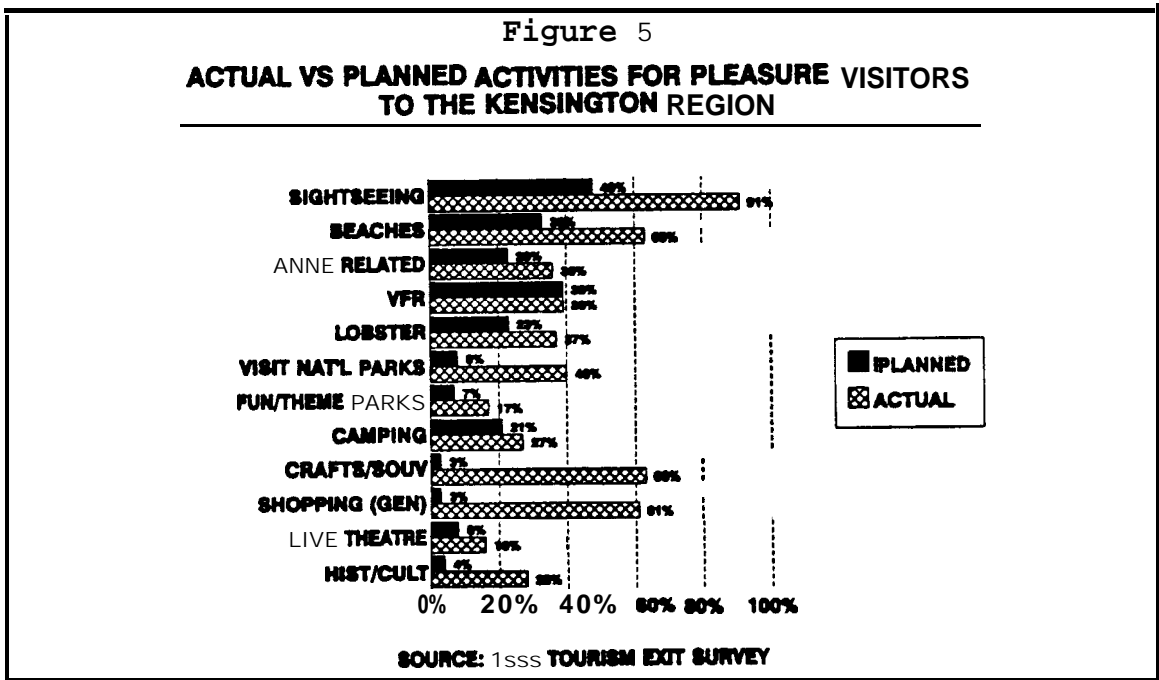


Thirty-five percent of visitors that overnighted in the Kensington tourism region stayed in non-paid accommodations, while 33% stayed in fixed roof facilities. Thirty-two percent stayed in campgrounds or trailer parks. When compared to provincial standards, the Kensington region attracted significantly more VFR, cottage and camping travelers, while attracting significantly fewer hotel/motel visitors.



**Visitor Activities**

sightseeing (48%) , visiting friends and relatives (39%) , and beach visits (39%) were the top activities planned by visitors to the Kensington region. Other planned activities included: Anne/Lucy Maud Montgomery activities; lobster suppers; and **camping**.

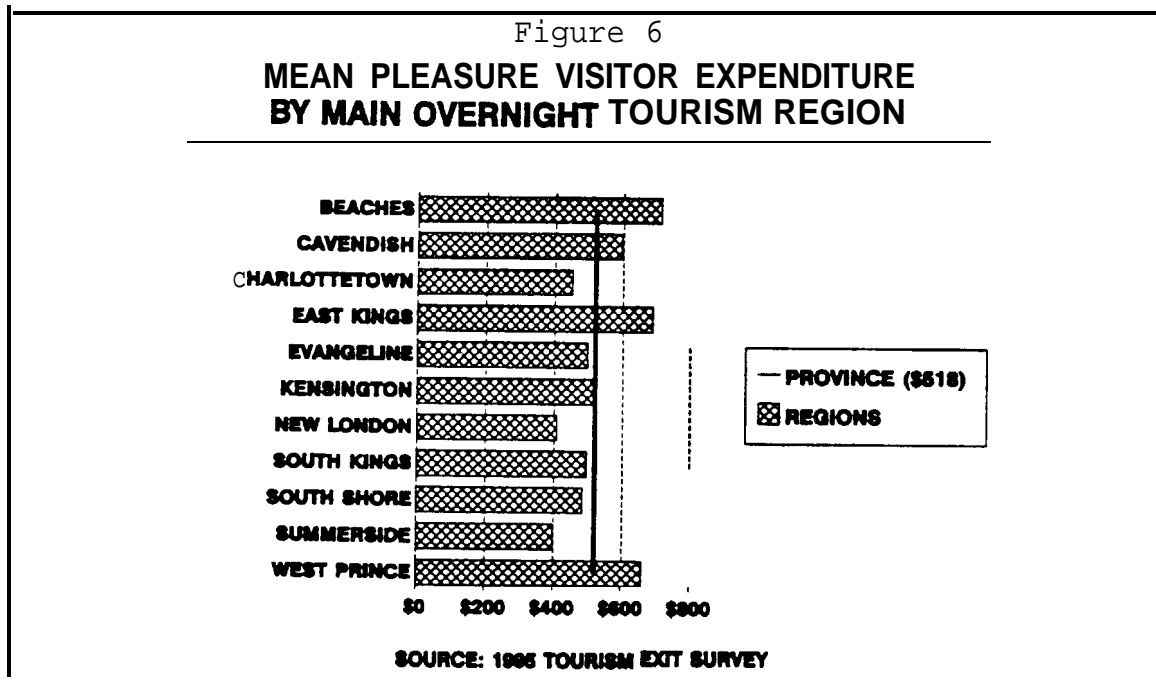


Visitors to the Kensington region actually participated in sightseeing (91%), beach visits (63%), **souvenir/handcraft** shopping (63%), and shopping for general merchandise more often than other activities. These activities, combined with the region's history/culture should continue to be the main lure piece to entice additional visitors to this region, until other commercial and non commercial attractions are developed.

#### Visitor Expenditures

Visitor receipts for the Kensington tourism region are estimated at \$5.4 million. The mean party expenditure by those who overnighed mainly in the Kensington tourism region is estimated at \$516, marginally lower than the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.4 people.

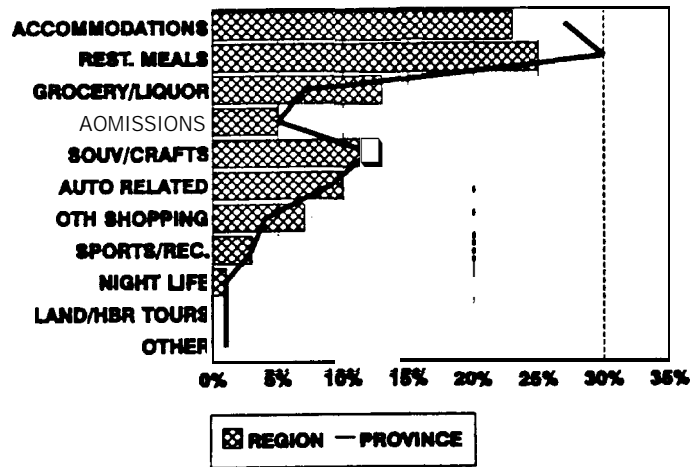
Accommodations, restaurant meals and grocery/liquor purchases combined, represented 64% of total expenditures, while purchases of handicrafts, souvenirs and other shopping goods represented 17% of expenditures. Automobile expenses, admissions to **attractions/events/sport** and recreation amenities accounted for a further 18% of expenditures. The balance, 1%, was spent on nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to the Kensington region tended to spend more on grocery/liquor purchases and automotive products, while spending below provincial averages on accommodations and restaurant meals. This latter point may be tied in to the significantly higher **VFR** component of Kensington's traffic.

Figure 7

### PERCENTAGE OF VISITOR EXPENDITURES ON VARIOUS TOURISM PRODUCTS



SOURCE: 1984 TOURISM EXIT SURVEY

(vii) NEW LONDON **TOURISM** REGION

**Regional Tourism Plant Inventory**

The 1994 Tourism Operator Survey defined the physical infrastructure of the New London region's tourism plant. The strength of this region's tourism plant rests with its accommodations sector.

THE NEW **LONDON** TOURISM P-

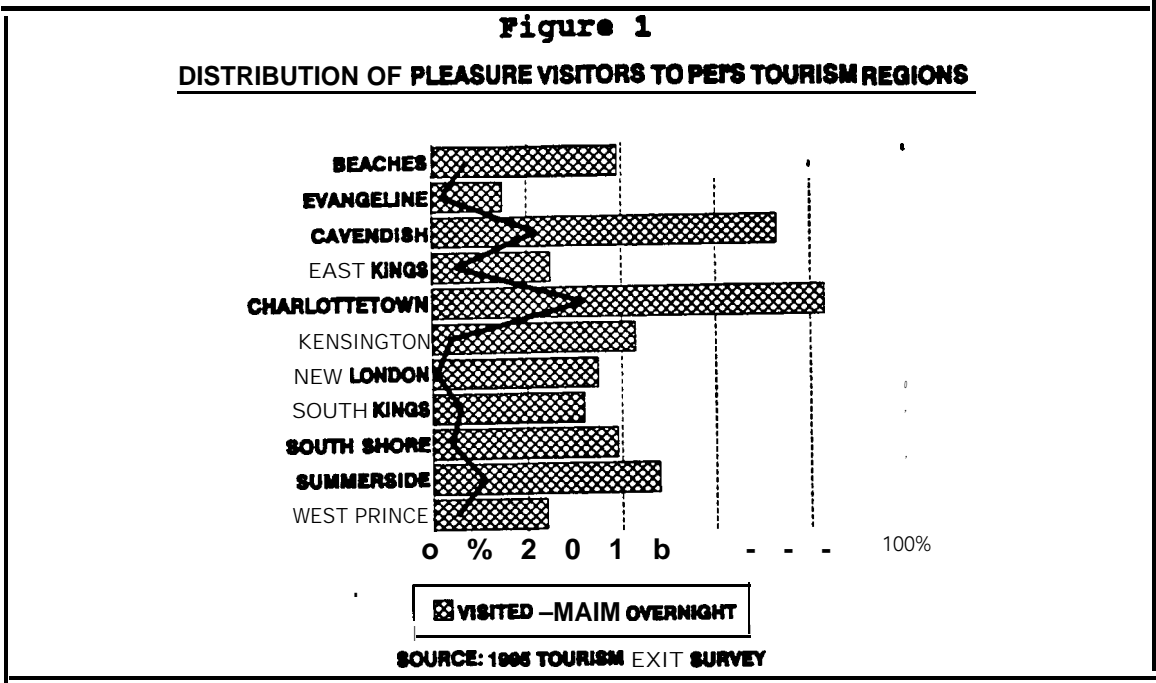
	1994	
	<b>NUMBER OPERATIONS</b>	<b>NUMBER UNITS</b>
<b>ACCOMMODATIONS</b>	30	83
<b>CAMPGROUNDS*</b>	0	0
<b>RESTAURANTS</b>	5	--
<b>ATTRACTIONS</b>	1	--
<b>ACTIVITIES</b>	2	--
<b>CRAFTS/GIFT SHOP</b>	5	--

● **Includes** government campgrounds

When compared to the provincial tourism plant, New London has a 4% share of fixed roof accommodation operators.

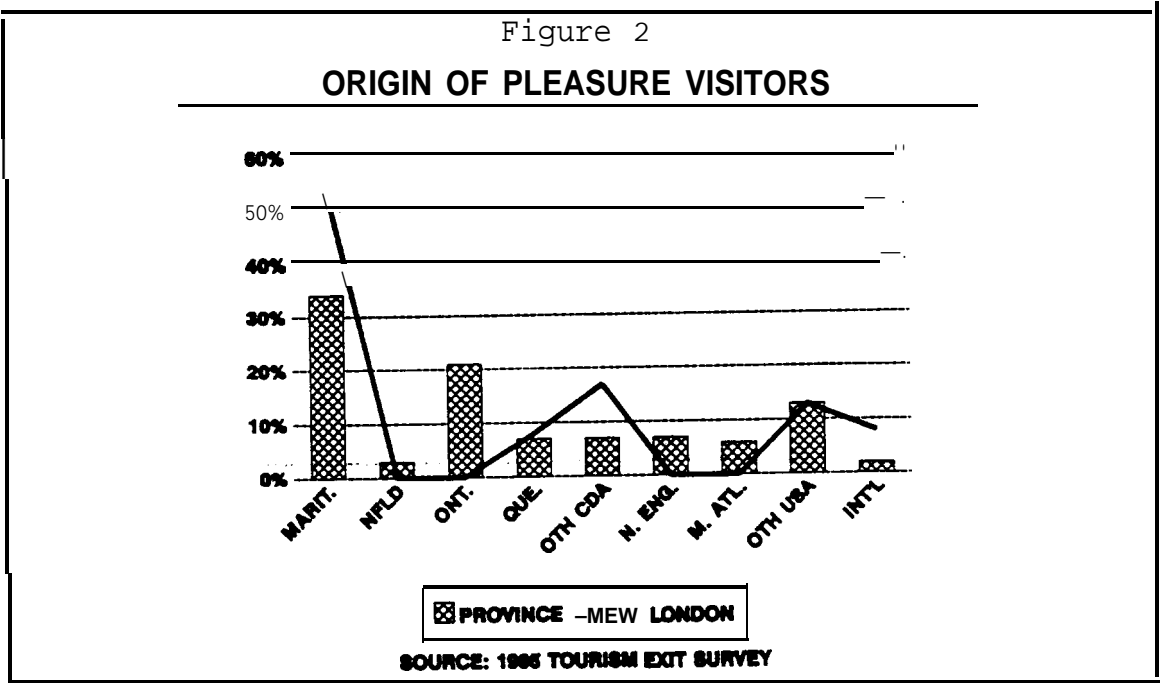
The 1995 Tourism Exit Survey concluded that 35% of all pleasure travelers to Prince Edward Island (an estimated 239,138 visitors) visited the New London region. This region was the "main" overnight destination for 1% of all pleasure travelers (6,832 visitors), who stayed an average of 5.0 nights, occupying an equivalent of 17,080 room nights in paid and non-paid accommodations.

When compared to 1994 visitation, the New London tourism region realized a 2% increase in overnight pleasure travel visitation. The length of time pleasure visitors overnighed in the New London tourism region decreased from 5.9 nights to 5.0 nights.

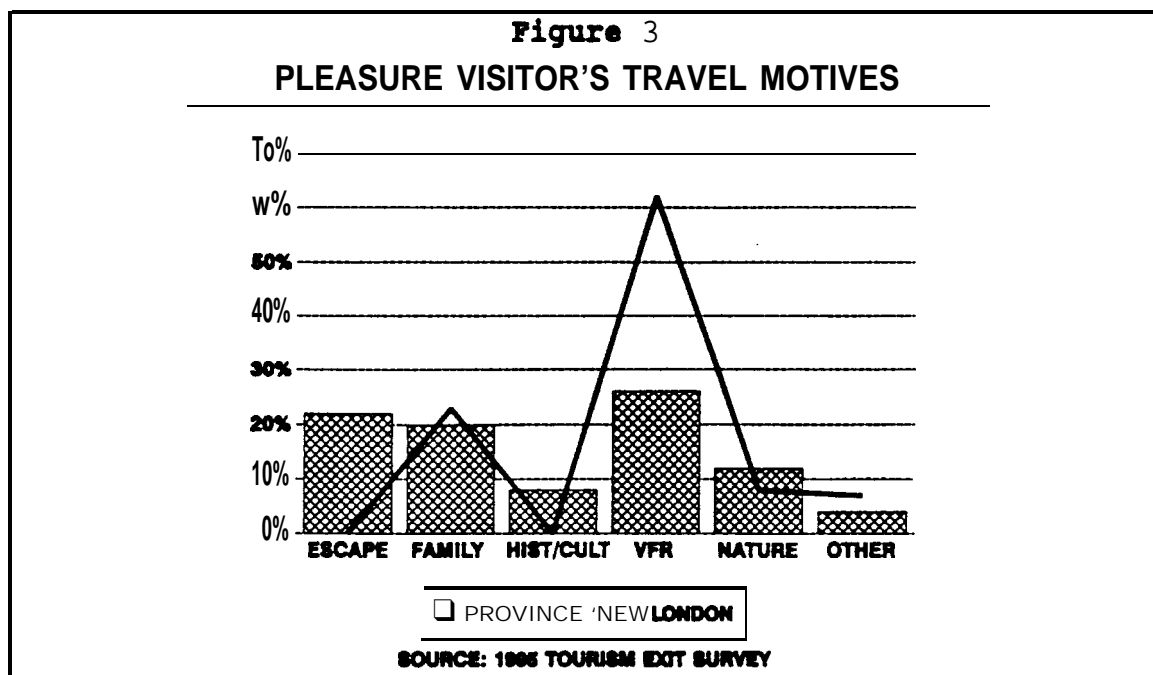


**Visitor Profile**

Fifty-four percent of all pleasure travelers who overnighted mainly in the New London area were Maritimers and 23% were visitors from provinces west of Ontario. Eight percent were Quebec pleasure travelers, while another 8% were American visitors. The balance, 7%, were from other origins. Sixty-two percent of visitors who overnighted mainly in the New London tourism region were repeat visitors.



Seventy-seven percent of visitors who overnighed in the New London tourism region were adult travelers, while the balance, 23%, were families. The majority of these visitors were over 40 years of age (77%). Seventy-seven percent of visitors that overnighed in the New London area reported 'non-family' travel motives. Visiting friends and relatives (62%) and experiencing a family vacation (23%) were primary travel motivators for visitors to this region.

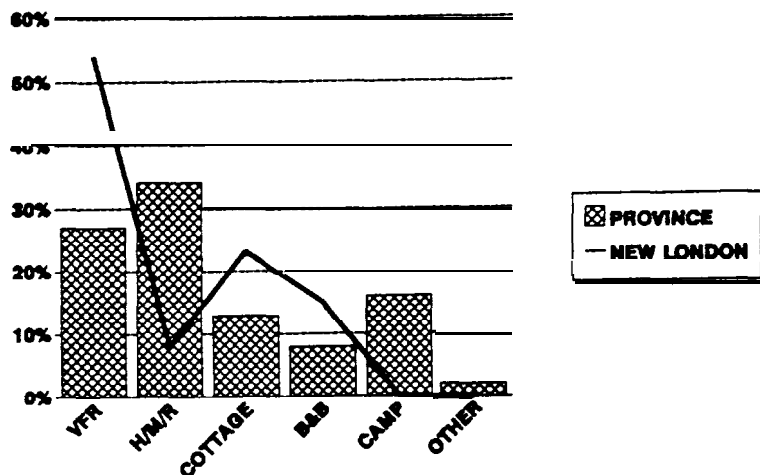


Given such strong VFR travel motives, it was not surprising to discover that 54% of all visitors who overnighed mainly in the New London tourism region stayed in non-paid accommodations. Forty-six percent stayed in fixed roof accommodations. Given the absence of campgrounds in this tourism region, it is understandable that all non-VFR visitors to this region stayed in fixed roof accommodations.

When compared to provincial standards, New London attracted significantly more VFR (visiting friends & relatives), cottage, and bed and breakfast visitors, while attracting significantly fewer travelers who stayed in hotels and motels.

Figure 4

ACCOMMODATIONS FREQUENTED BY VISITORS TO NEW LONDON



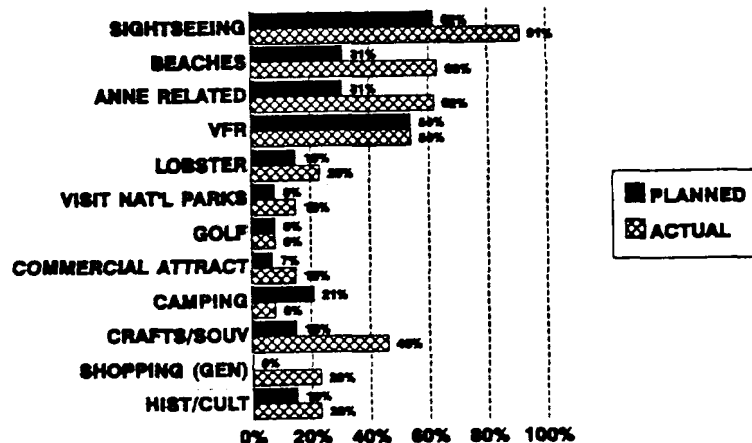
SOURCE: 1986 TOURISM EXIT SURVEY

Visitor Activities

Sightseeing (62%) and visiting friends and relatives (54%) were the main activities planned by visitors to the New London region. Other planned activities included beach visits and Anne related activities.

Figure 5

ACTUAL VS PLANNED ACTIVITIES FOR PLEASURE VISITORS TO THE NEW LONDON REGION



SOURCE: 1986 TOURISM EXIT SURVEY

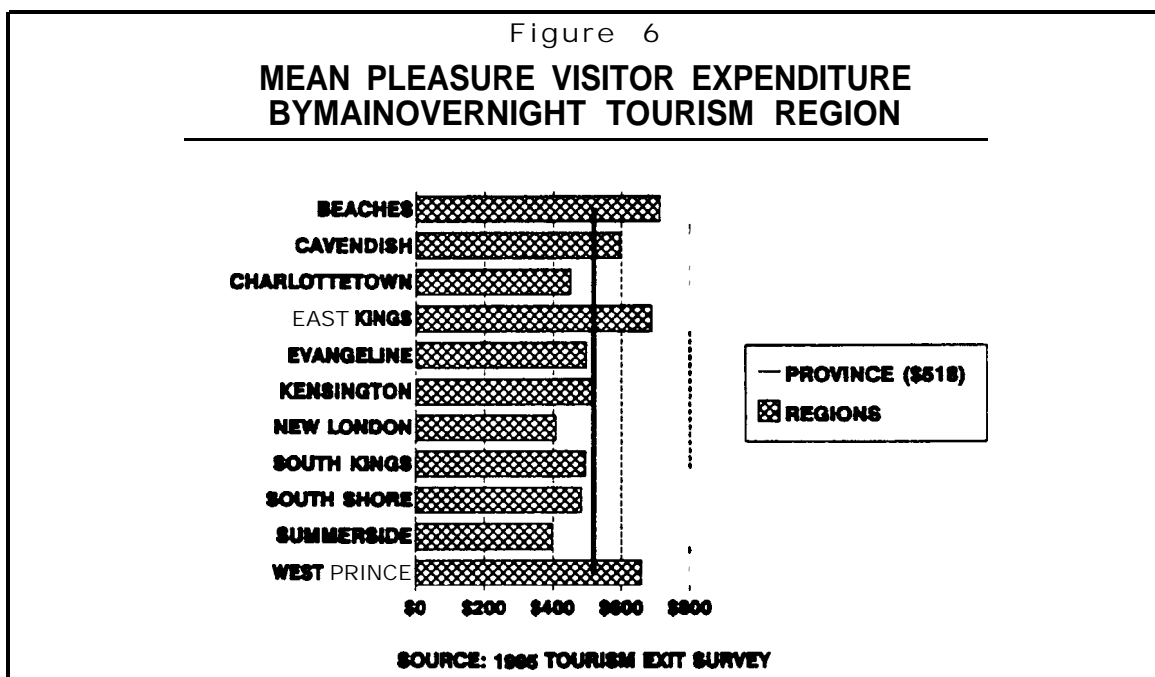


Visitors to the New London area tended to actually participate in sightseeing (91%) and visiting friends and relatives (54%)-activities, more than other activities. These activities should form the base for any lure pieces that may be developed to entice additional visitors to this region.

### Visitor Expenditures

Visitor receipts for the New London tourism region are estimated at \$1.5 million. The mean party expenditure by those who overnighed in the New London tourism region is estimated at \$408, 21% below the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 1.9 people. Given the high ratio of VFR traffic in this region, it is not surprising that the average visitor party expenditures are significantly below the provincial average.

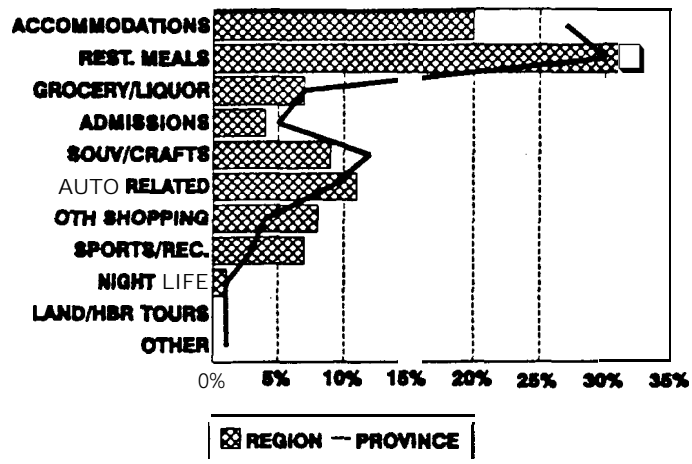
Restaurant meals and grocery/liquor purchases combined, represented 45% of total expenditures, while accommodations accounted for 13% of visitor expenditures. Purchases of handicrafts, souvenirs and other shopping goods represented 23% of expenditures, while automobile expenses, admissions to attractions/events/sport and recreation amenities accounted for 18% expenditures. The balance, 1%, was spent on nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to the New London region tended to spend more against restaurant meals, crafts and souvenirs, automotive expenses and other shopping goods, while spending significantly less on accommodations.

**Figure 7**

**PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS**



SOURCE: 1994 TOURISM EDT SURVEY

## (viii) SOUTHERN KINGS TOURISM REGION

### Regional Tourism Plant Inventory

The physical infrastructure of the Southern Kings tourism plant was defined by a 1994 Tourism Operator Survey. The strengths of this region's tourism plant lie with its fixed roof accommodation, restaurant, and craft/gift shop sectors. Collectively, these operators account for 80% of this region's tourism plant.

#### THE SOUTHERN KINGS TOURISM PLANT

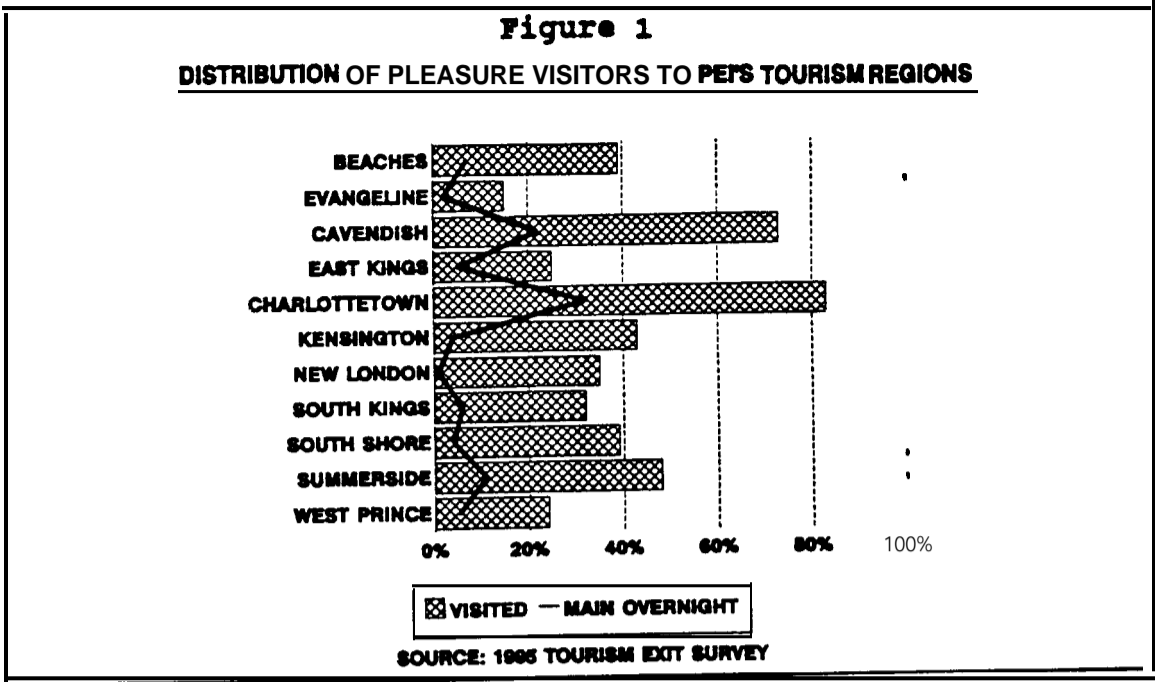
	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	99	S23
CAMPGROUNDS ●	7	456
RESTAURANTS	45	--
ATTRACTIONS	16	--
ACTIVITIES	21	--
CRAFTS/GIFT SHOP	<b>30</b>	--

● Includes government campgrounds

Southern Kings has a 12% share of the Province's tourism plant. It ranks first in the number of craft and gift shop (18%) operators, second in attractions (16%), and third in the number of restaurant operators (10%).

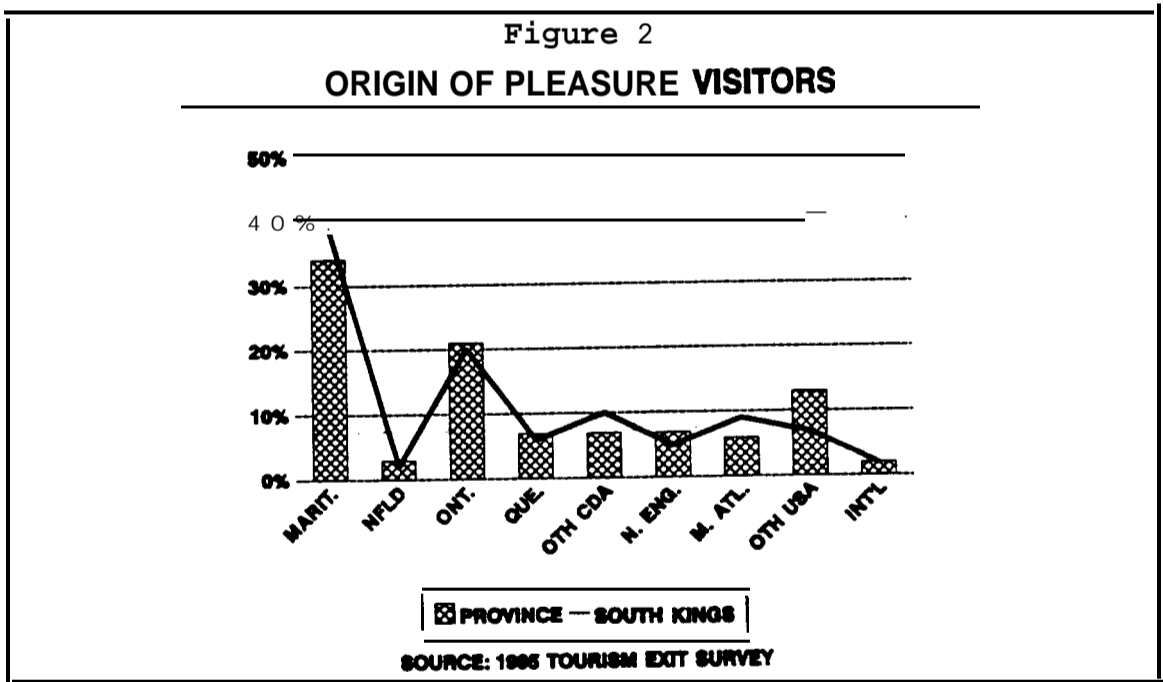
The 1995 Tourism Exit Survey concluded that 32% of all pleasure travelers to Prince Edward Island, an estimated 218,640 visitors, visited the Southern Kings region. This region was the 'main' overnight destination for 6% of all pleasure travelers (40,995 visitors), who stayed an average of 6.3 nights, occupying an equivalent of 129,134 room nights in paid and non-paid accommodations.

When compared to 1994 visitation levels, -Southern Kings realized a 23% increase in overnight pleasure visitation. With respect to length of time spent in the region, overnight visitations increased from 4.5 nights in 1994 to 6.3 nights in 1995.

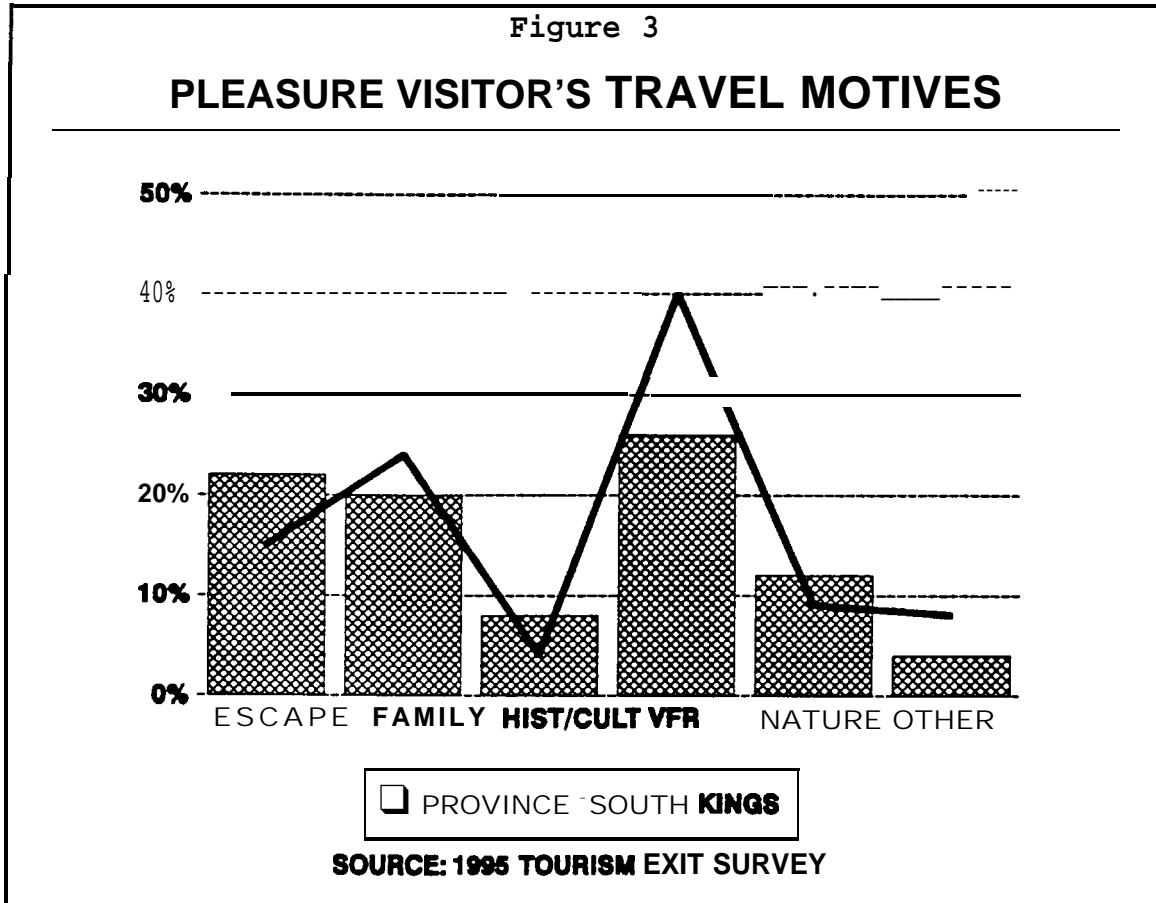


**Visitor Profile**

Thirty-nine percent of all overnight pleasure travelers to the Southern Kings area were Maritime vacationers and 21% were American visitors. Twenty percent were from the province of Ontario, while the balance, 20%, were from other origins. Sixty-nine percent of all visitors who overnighted mainly in the Southern Kings tourism region were repeat visitors. Repeat visitation figures are significantly higher than the provincial norm (59%), and could be a reflection of high VFR traffic.

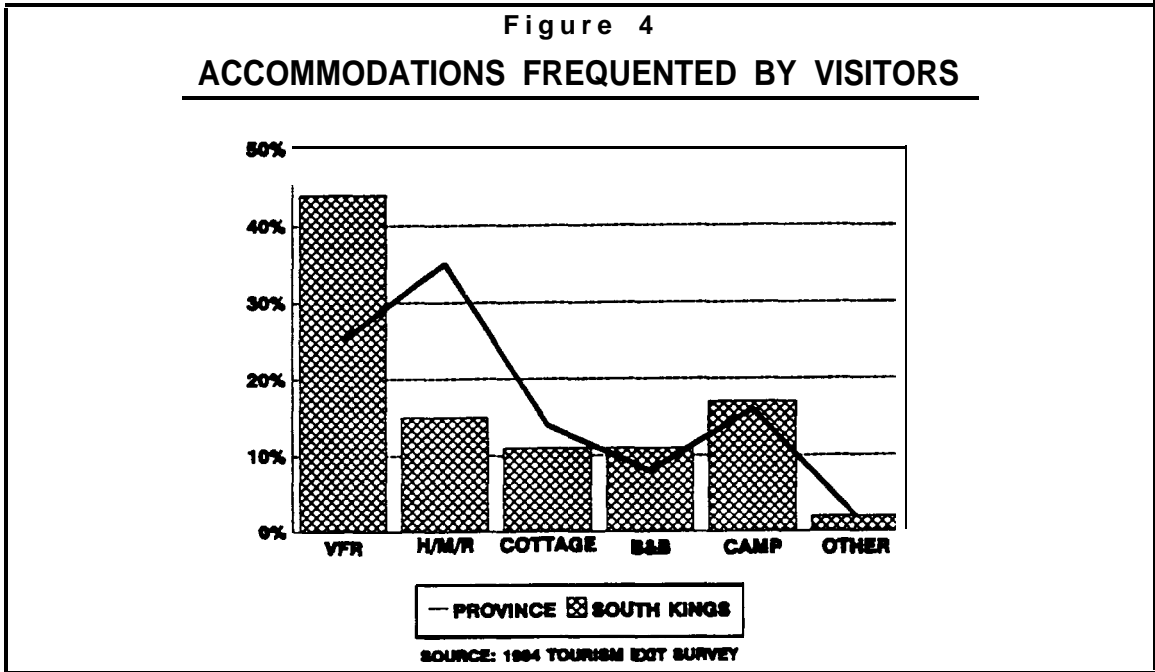


Seventy percent of visitors who overnighted **in** Southern Kings were adult travelers, while the balance, 30%, were families. The strong majority of these visitors were over 40 years of age (74%). Given this region's appeal to the adult couples market, it is not surprising to find that 86% of visitors that overnighted in the Southern Kings area reported "non-family" travel motives. Visiting friends and relatives (40%), experiencing a family vacation (24%), and relax and escape (15%) were primary travel motivators for these visitors.



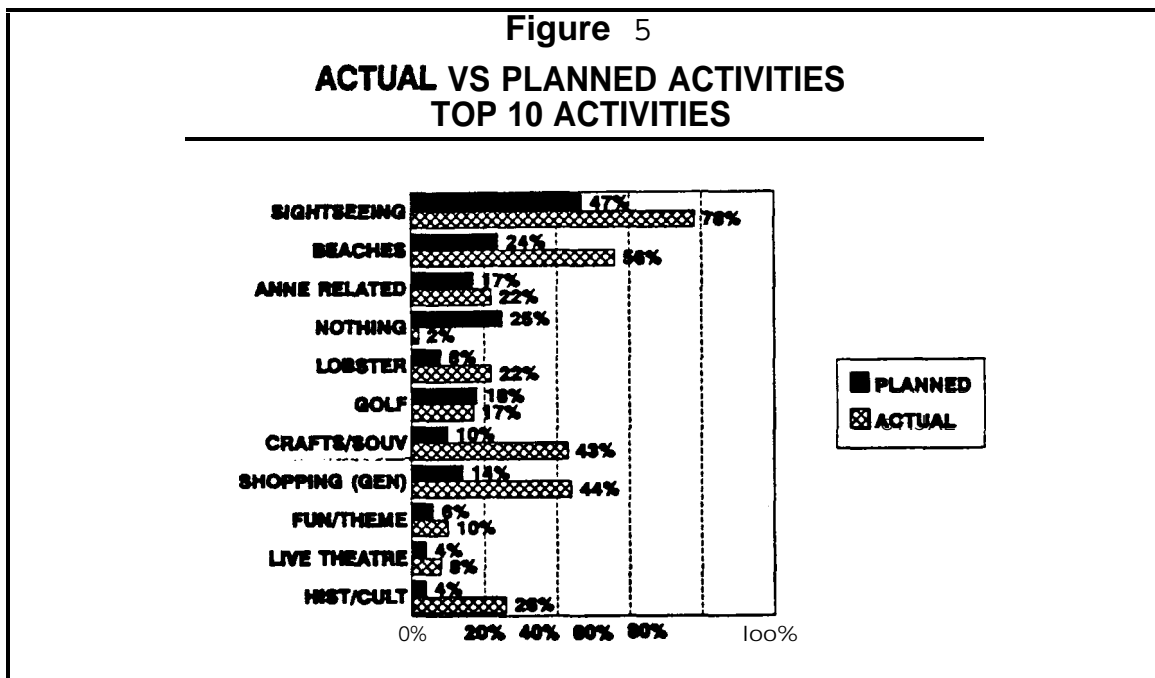
When compared to provincial norms, Southern Kings attracted significantly more visitors that **travelled** for **VFR** motives.

Forty-three percent of the visitors that overnighted mainly in the Southern Kings tourism region stayed in non-paid accommodations, while 37% stayed in fixed roof accommodations, and 20% stayed in campgrounds or trailer parks. The high ratio of visitors staying in non-paid accommodations is not surprising, given the strong **VFR** travel motives of visitors to this tourism region.



**Visitor Activities**

Sightseeing (64%), visiting friends and relatives (42%), and visiting the beaches (35%) were the main activities planned by visitors to Southern Kings. **Other** planned activities included Anne/Lucy Maud Montgomery activities, camping, and **golf**.

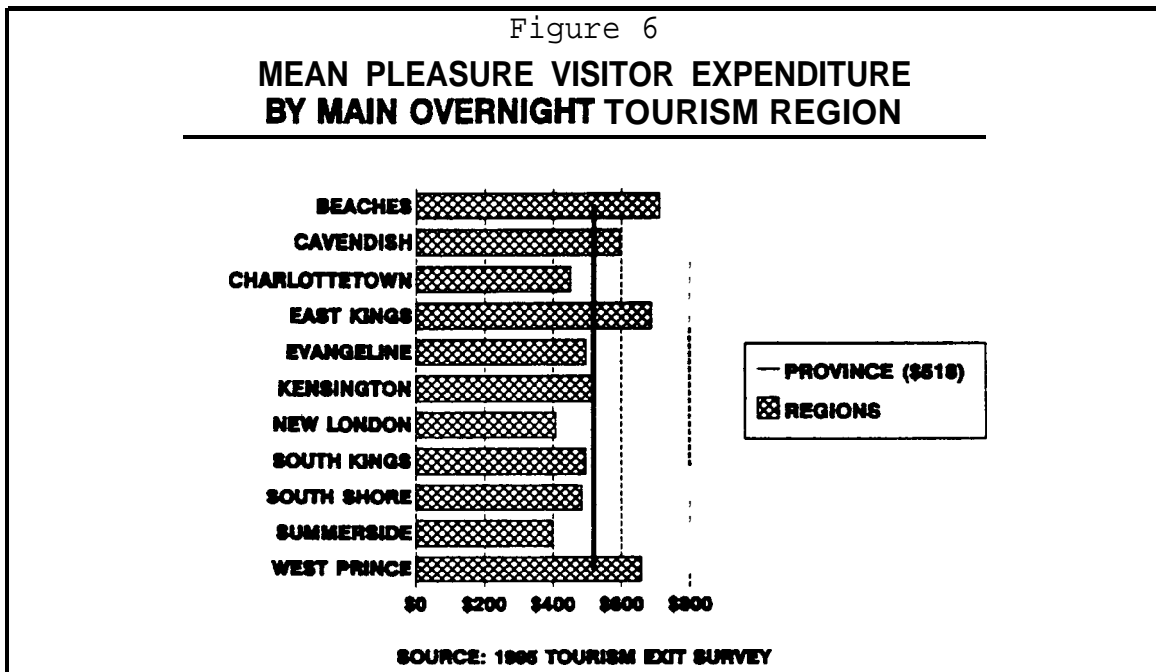


Visitors to Southern Kings **actually participated** in sightseeing (85%), beach visits (57%), general shopping (55%), craft/souvenir shopping (47%) and visiting friends and relatives (50%), more than other activities. The **region's** sights, beaches, crafts and golf should continue to be emphasized in future lure pieces.

Visitor Expenditures

Visitor receipts for the Southern Kings tourism region are estimated at \$8.7 million. The mean **party** expenditure by those who overnighed mainly in the Southern Kings tourism region is estimated at \$495, 4% below than the provincial average of \$518. The high percentage of VFR traffic to this region may account for this variance. The average party size for visitors that overnighed mainly in Southern Kings is estimated at 2.5 people.

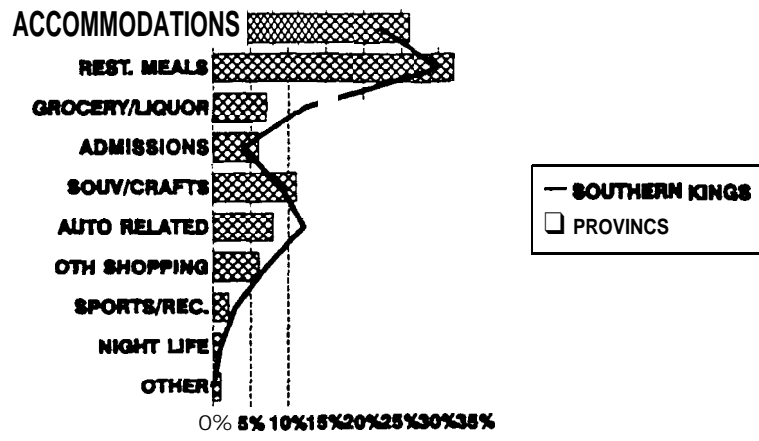
Accommodations, restaurant meals, and grocery/liquor purchases combined represented 64% of total expenditures, while purchases of handicrafts, souvenirs and other shopping goods represented a further 16% of expenditures. Automobile expenses, admissions to attractions, events, sport and recreation amenities accounted for an additional 19% of expenditures. The balance, 1%, was on nightlife and miscellaneous expenses.



**When** compared to provincial spending norms, visitors to Southern Kings tended to spend more against auto related and grocery/liquor products, while spending below the provincial average on accommodations, restaurant meals, admissions, handicrafts and souvenirs.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS



SOURCE: 1986 TOURISM EXP. SURVEY



### (iii) SOUTH SHORE TOURISM REGION

#### Regional Tourism Plant **Inventory**

The physical infrastructure of tourism in the South Shore tourism region was defined by a 1994 Tourism Operator Survey. The strengths of this region's tourism plant rests with its fixed roof accommodation and restaurant sectors. Collectively, they represent 75% of this tourism region's plant. Overall, the South Shore region has a 9% share of the Province's tourism plant.

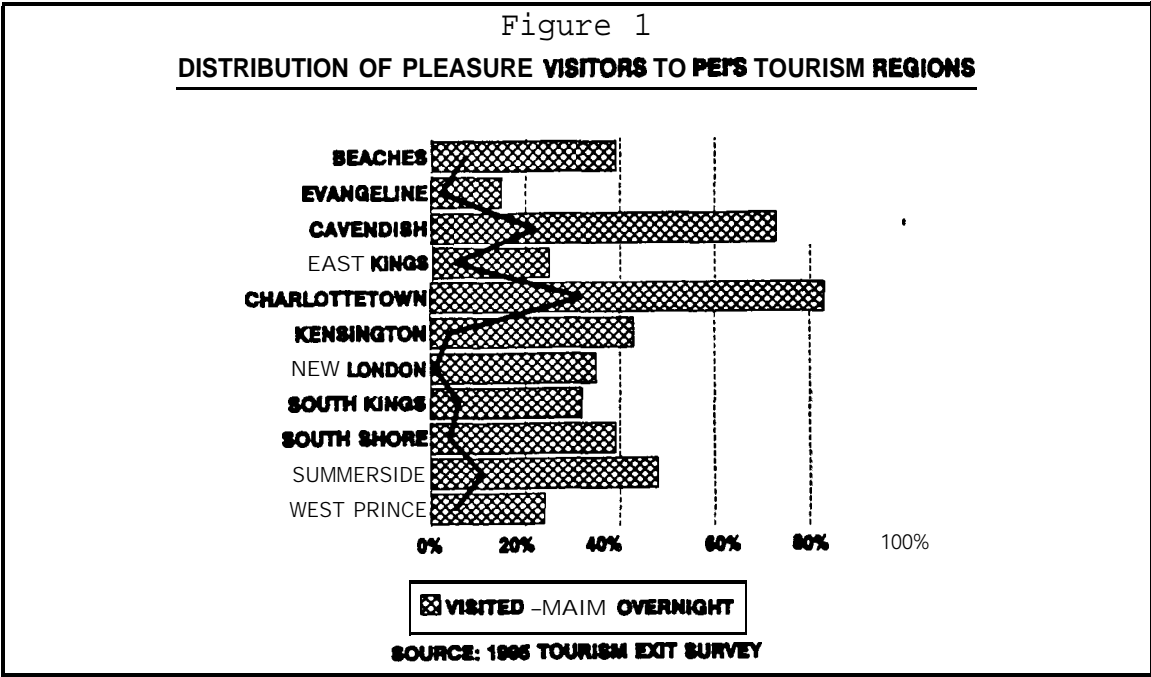
#### **THE SOUTH SHORE TOURISM PLANT**

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
ACCOMMODATIONS	96	442
CAMPGROUNDS ●	5	696
RESTAURANTS	29	--
ATTRACTIONS	9	--
ACTIVITIES	12	--
<b>CRAFTS/GIFT SHOP</b>	15	--

● Includes government campgrounds

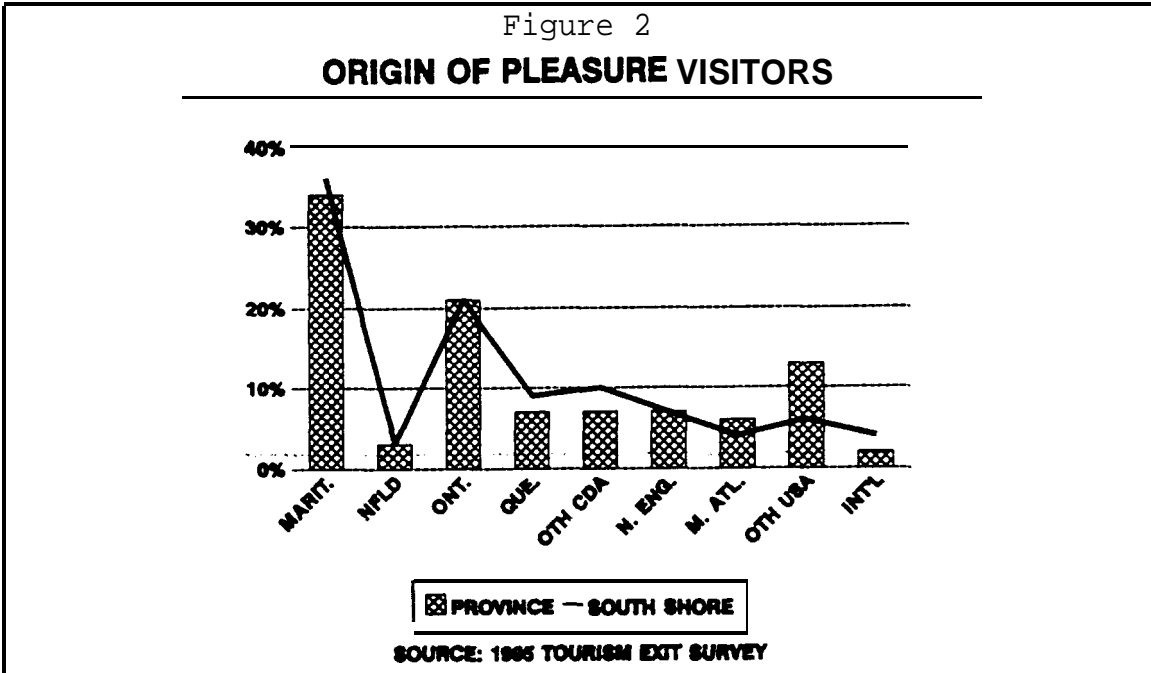
The 1995 Tourism Exit Survey concluded that 39% of all pleasure travelers to Prince Edward Island (an estimated 266,468 visitors) visited the South Shore region. This region was the **"main"** overnight destination for 4% of all pleasure travelers (27,330 visitors), who stayed an average of **5.0** nights, occupying an equivalent of 68,325 room nights in paid and non-paid accommodations.

When compared to 1994 visitation, the South Shore tourism region realized a 18% decrease in overnight pleasure visitation. With respect to the length of time these visitors spent in the region, overnight visitations -increased **marginally from** 4.9 nights in 1994 to 5.0 nights in 1995.

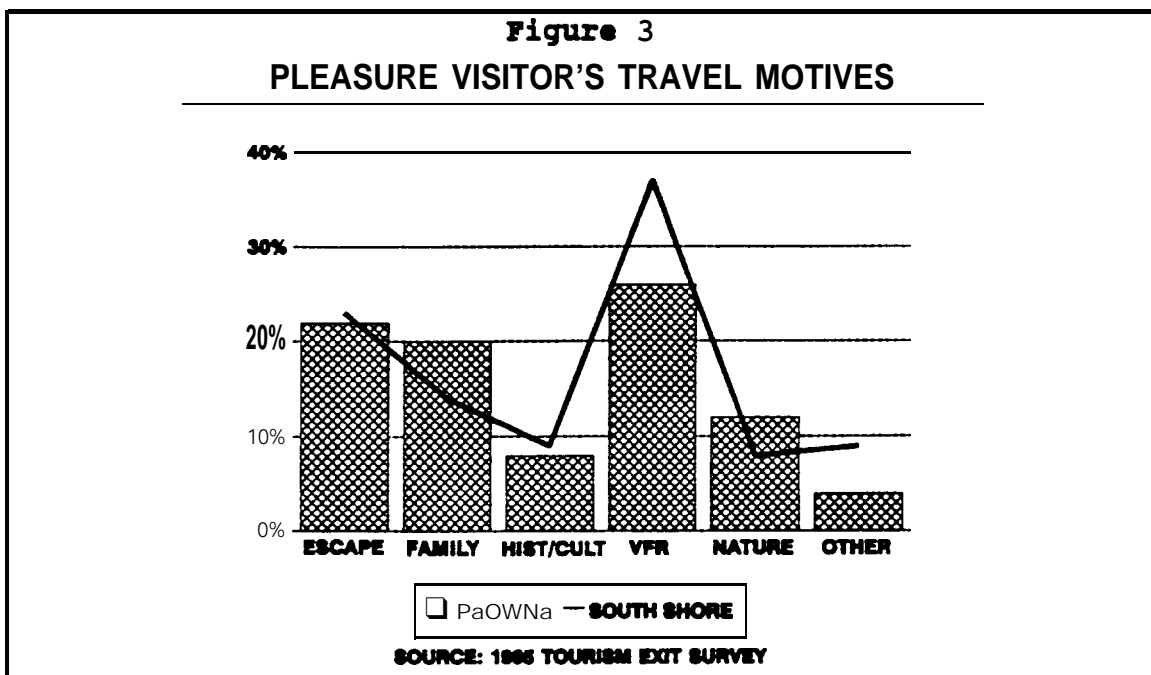


**Visitor Profile**

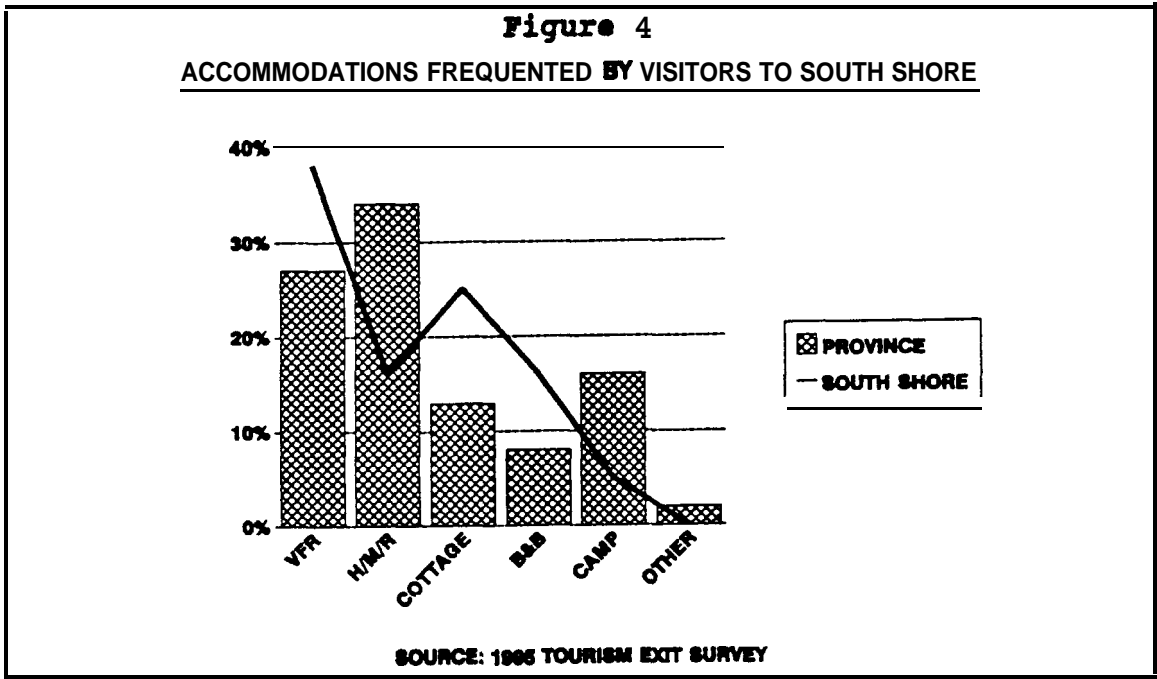
Thirty-six percent of all overnight pleasure travelers to the South Shore were Maritime vacationers, and 21% were pleasure travelers from Ontario. Eighteen percent were Americans, and 9% were from Quebec. The balance of pleasure travelers, 16%, were from other origins. Seventy-six percent of all visitors who overnightsed mainly in the South Shore tourism region were repeat visitors.



Seventy-seven percent of visitors who overnighted mainly in the South Shore tourism region were adult travelers, while the balance, 23%, were families. The majority of these visitors **were over 40** years of age (**69%**). Given this **region's** strong appeal to the adult couples market, it is not surprising that **86%** of **visitors that** overnighted in the South Shore area reported "non-family" travel motives. Visiting friends and relatives (37%), and relax and escape (23%), were primary travel motivators for these visitors.

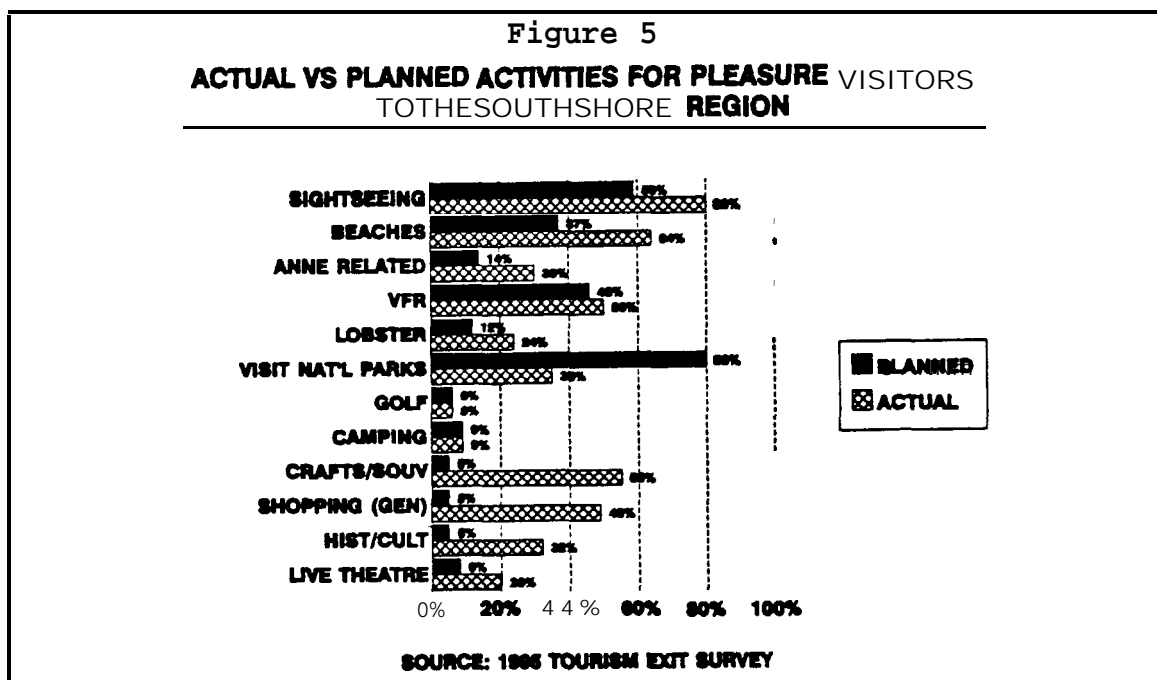


Fifty-six percent of all visitors that overnighted mainly in the South Shore tourism region stayed in paid, fixed roof accommodations, while 38% stayed with friends and relatives in non-paid accommodations. The balance of visitors, 6%, stayed at private/government campgrounds. When compared to provincial standards, the South Shore region attracted more VFR (visiting friends and relatives), cottage and bed and breakfast travelers, while attracting fewer hotel/motel and camping visitors.



**visitor Activities**

Visiting PEI's National Parks (80%), sightseeing (59%), visiting friends and relatives (46%), and beach visits (37%) were the top activities planned by visitors to the South Shore region. Other planned activities included Anne related attractions and lobster.

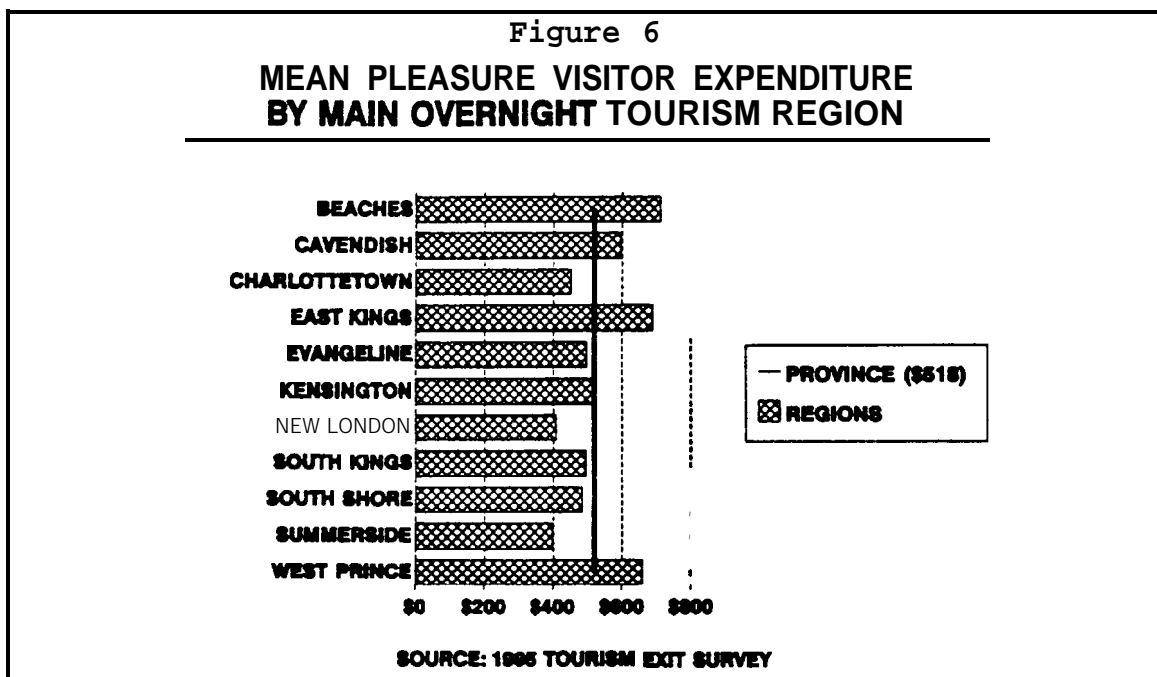


Visitors to the South Shore region tended to actually participate in sightseeing (80%), beach visits (64%), craft and souvenir shopping (55%), visiting friends and relatives (50%), and shopping for general merchandise (49%), more than other activities. These activities should serve as the main themes for lure pieces to entice additional visitors to this region.

### Visitor Expenditures

Visitor receipts for the South Shore tourism region are estimated at \$5.9 million. The mean party expenditure by those who overnighed mainly in the South Shore tourism region is estimated at \$484, marginally lower than the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.3 people.

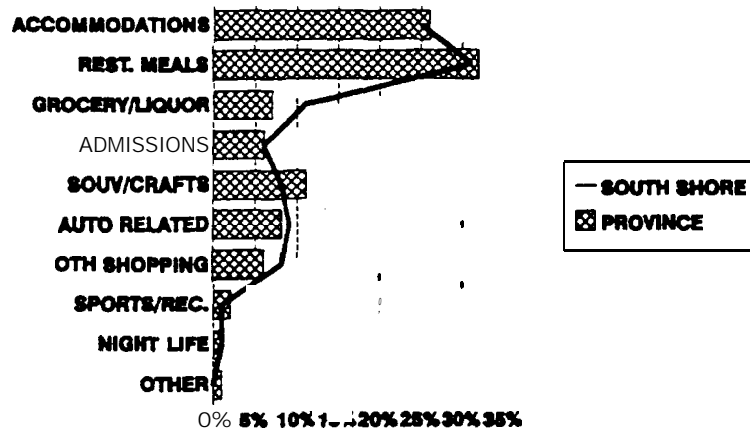
Accommodations, restaurant meals, and grocery/liquor purchases **combined**, represented 65% of total expenditures; while purchases of handicrafts, souvenirs and other shopping goods represented 15% of expenditures. Automobile expenses, admissions to attractions/events/sport and recreation amenities accounted for a further 16% of expenditures. The balance, 4%, was spent on nightlife and miscellaneous-expenses.



When compared to provincial spending norms, visitors to the South Shore region tended to spend marginally more on grocery/liquor purchases, auto related expenses, and shopping for **general merchandise**, while spending slightly below the provincial average on accommodations, restaurant meals and crafts/souvenirs.

Figure 7

**PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS**



SOURCE: 1986 TOURISM EXIT SURVEY

## (x) SUMMERSIDE TOURISM REGION

### Regional Tourism Plant Inventory

A 1994 **survey** of Tourism Operators defined the physical infrastructure of tourism in the Summerside region. The strength of the region's tourism plant lies with its fixed roof accommodation and restaurant sectors. Collectively, these operators account for 75% of the Summerside region's tourism plant. On a provincial basis, **Summerside** has a **4%** share of fixed **roof accommodations** and an **11%** share of restaurant operators.

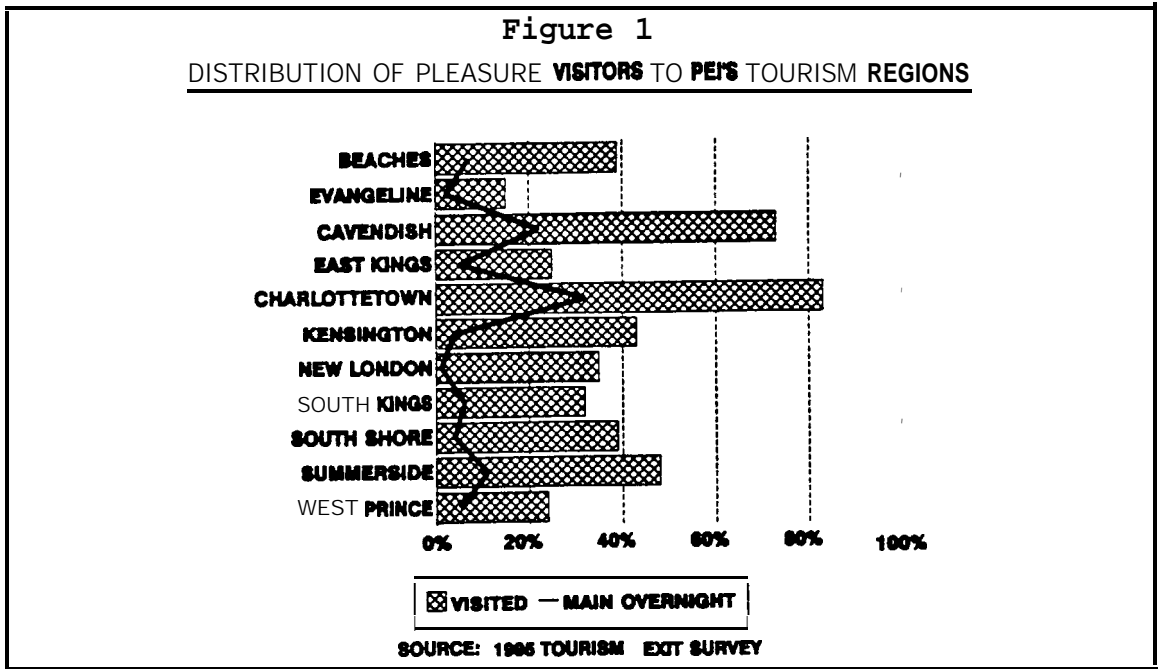
#### THE SUMMERSIDE TOURISM PLANT

	1994	
	NUMBER Operations	NUMBER UNITS
ACCOMMODATIONS	32	555
<b>CAMPGROUNDS*</b>	2	91
RESTAURANTS	53	..
ATTRACTIONS	5	--
ACTIVITIES	6	--
CRAFTS/GIFT SHOP	<b>15</b>	--

- Includes government campgrounds

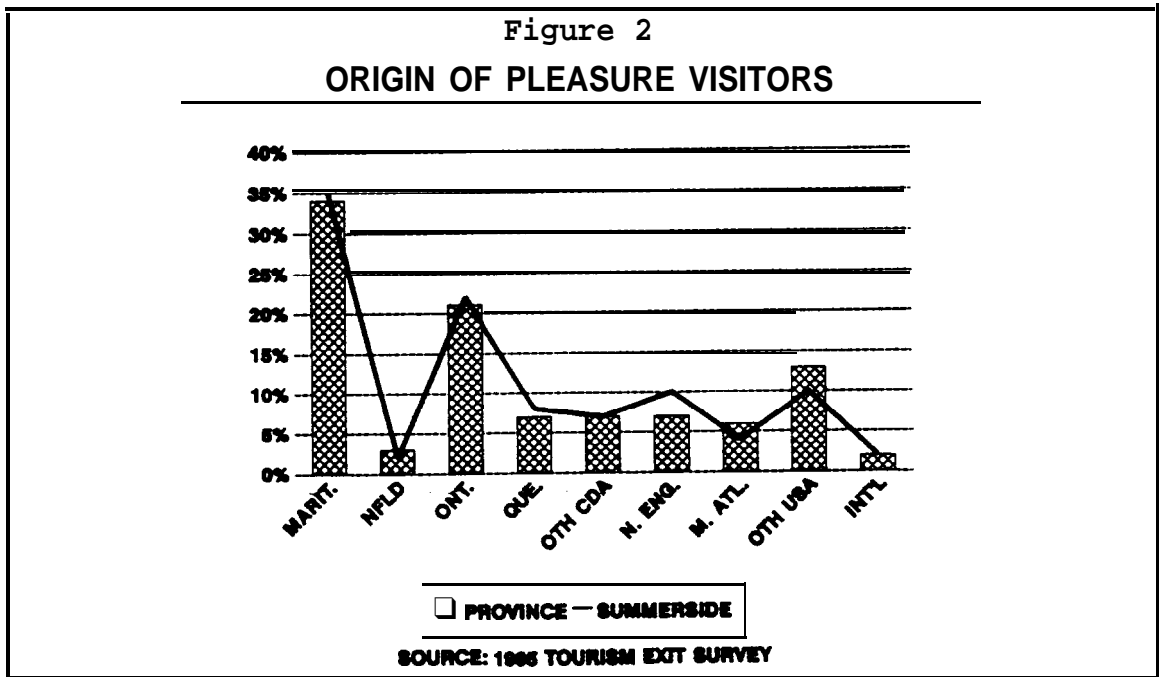
The 1995 Tourism Exit Survey concluded that 48% of all pleasure travelers to Prince Edward Island (an estimated 327,961 visitors) visited the **Summerside** region. This region was the "**main**" overnight destination for 11% of all pleasure travelers (75,158 visitors), who stayed an average of 4.4 nights, occupying an equivalent of 165,348 room nights in both paid and non-paid accommodations.

When compared to 1994 visitations, the Summerside tourism region realized a 2% increase in overnight pleasure travel visitations. The length of time-overnight pleasure travelers stayed in the region increased from 4.0 nights in 1994 to 4.4 nights in 1995.



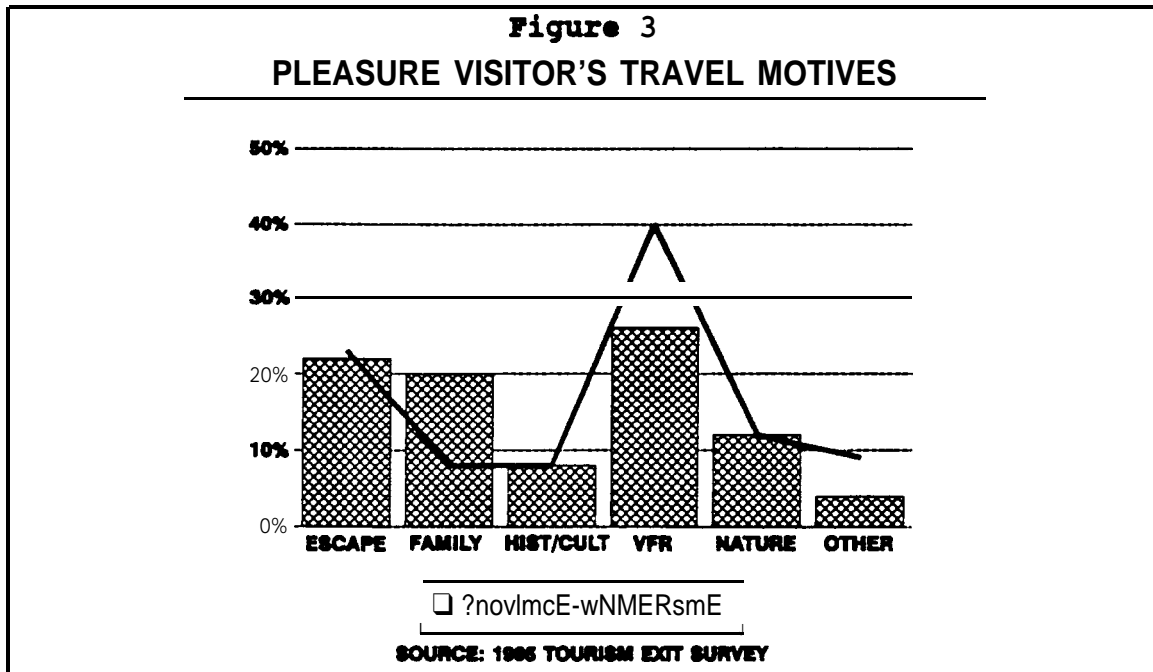
### Visitor Profile

Thirty-five percent of all overnight pleasure travelers to the Summerside tourism region were Maritime travelers. American and Ontarian vacationers represented 24% and 22% of visitors respectively, while 19% of pleasure travelers were from other origins. Sixty-one percent of all visitors who overnighted in the Summerside tourism region were repeat visitors.

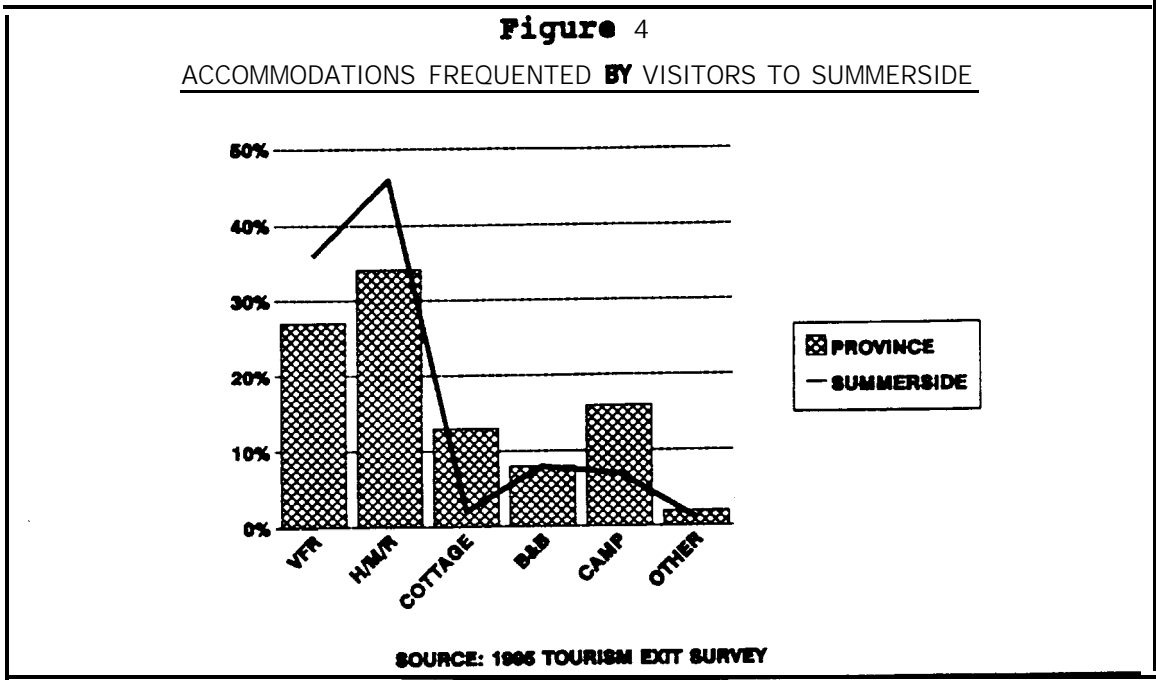




Eighty percent of visitors who **overnighted** mainly in the Summerside tourism region were adult travellers, -while the balance, 20%, were families. The majority of these visitors were over 40 years of age (72%). Given this region's appeal **to** the adult couples market, it is not surprising to find that 92% of visitors that overnighted in the Summerside area reported "**non-family**" travel motives. Visiting friends and relatives (40%), and relax and escape (23%) were primary travel motivators for these visitors.

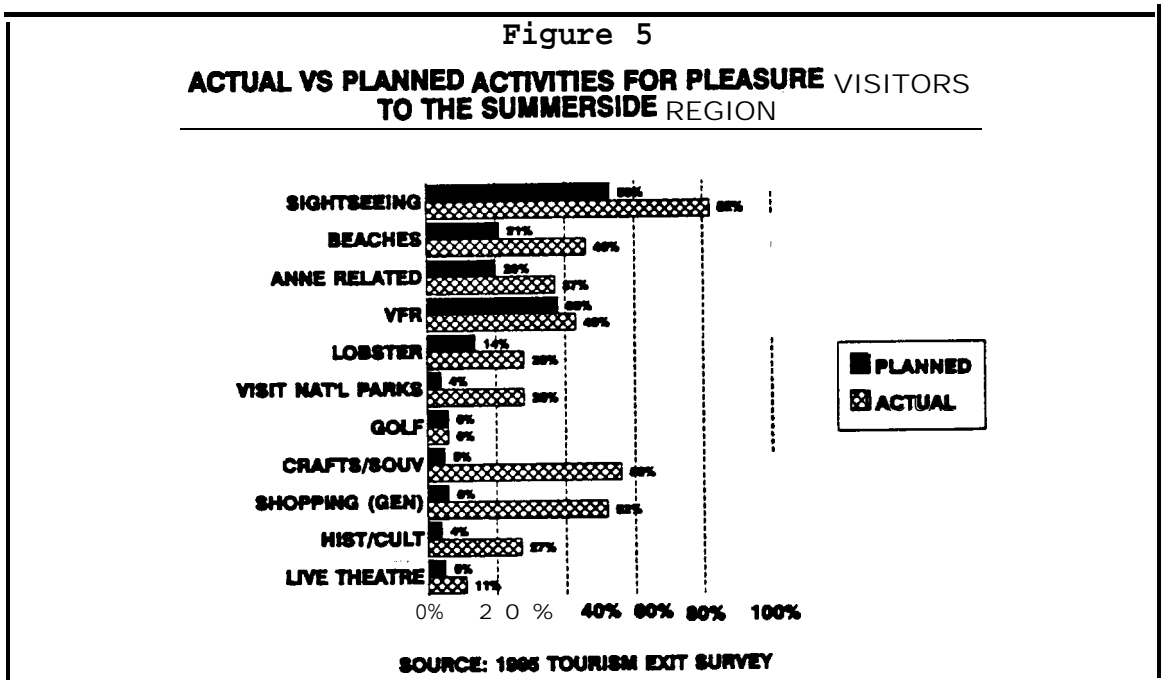


Forty-six percent of visitors that overnighted in the Summerside tourism region stayed in hotels/motels, while 36% stayed with friends and relatives in non-paid accommodations. Ten percent stayed in other fixed roof accommodations, while 8% frequented campgrounds or trailer parks. When compared to provincial norms, Summerside attracted significantly more travelers who stayed in hotels/motels and with friends and relatives, while attracting fewer cottagers and campground vacationers.



**Visitor Activities**

Sightseeing (53%), visiting friends and relatives (38%), beach visits (21%) and Anne attractions were the main activities planned by visitors to the Summerside region.

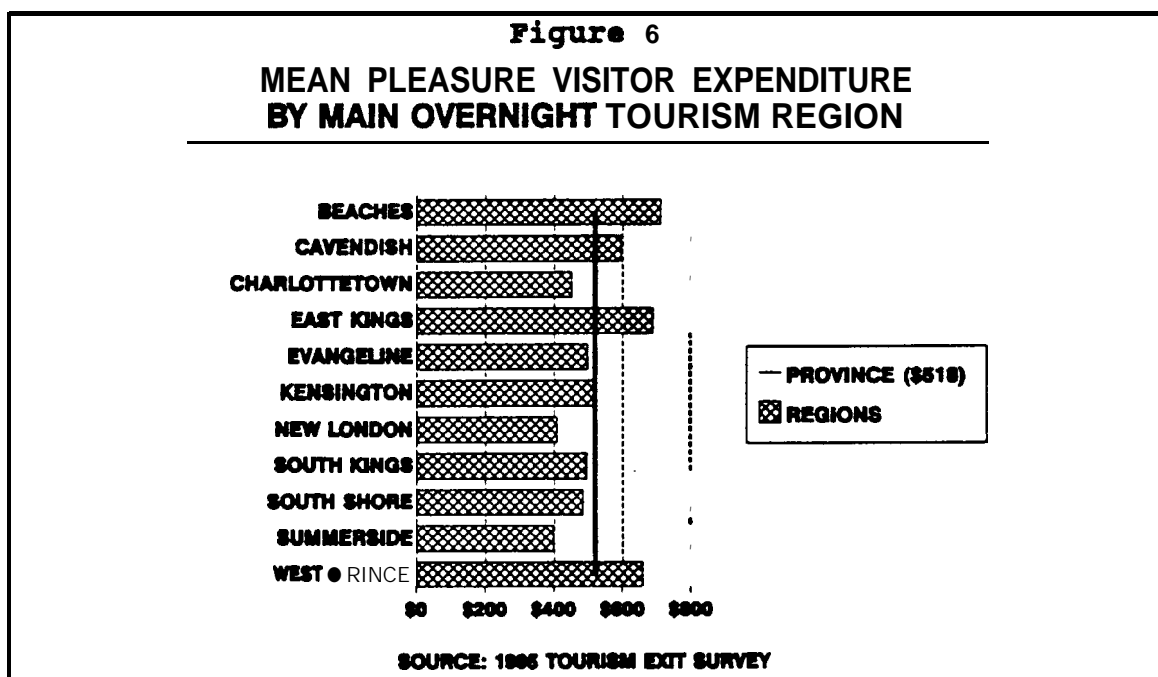


Visitors to the Summerside area actually **participated** in sightseeing (82%), souvenir shopping (56%), and shopping for general merchandise (52%) more than **other** activities. These activities should continue to be the main lure pieces to entice additional visitors to this region.

### Visitor Expenditures

Visitor receipts for the Summerside tourism region are estimated at \$16.1 million. The mean party expenditure for those who overnighed mainly in the Summerside tourism region is estimated at \$397, 23% below the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.2 people.

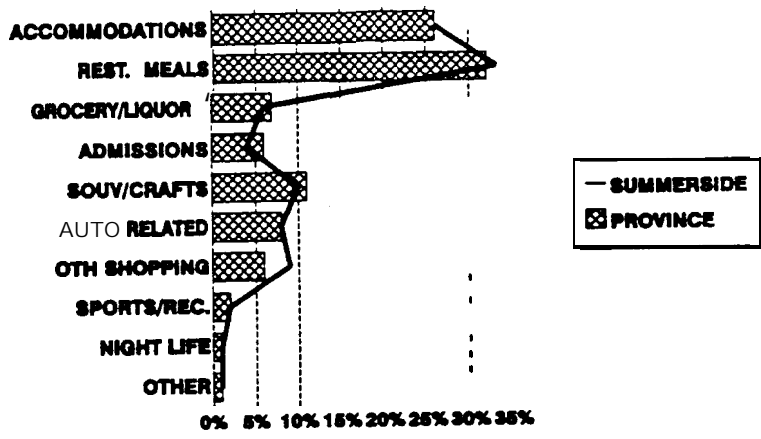
Accommodations, restaurant meals and grocery/liquor purchases combined, represented 65% of total expenditures, while purchases of handicrafts, souvenirs and other shopping goods represented 19% of expenditures. Automobile expenses, admissions to attractions/events/sports and recreation amenities accounted for a further 13% of expenditures. The balance, 3%, was spent on nightlife and miscellaneous expenses.



When compared to provincial spending norms, visitors to the Summerside region tended to spend marginally more on restaurant meals and shopping goods, while spending marginally less on grocery and liquor purchases, admissions and craft/souvenirs.

Figure 7

PERCENTAGE OF VISITOR EXPENDITURES  
ON VARIOUS TOURISM PRODUCTS



SOURCE: 1996 TOURISM EXIT SURVEY

## (xi) WEST PRINCE TOURISM REGION

### Regional Tourism Plant Inventory

A 1994 **survey** of Tourism Operators defined the physical infrastructure of tourism in the West Prince tourism region. The strengths of this region's tourism plant lies in its fixed roof accommodation and restaurant sectors. Collectively these sectors account for 69% of the region's tourism plant.

Provincially, West Prince ranks second with 15% of the province's campground operators, third in attraction operators (14%) and fourth in restaurant operators (**9%**). Overall the West Prince tourism area accounts for 8% of the Province's tourism plant.

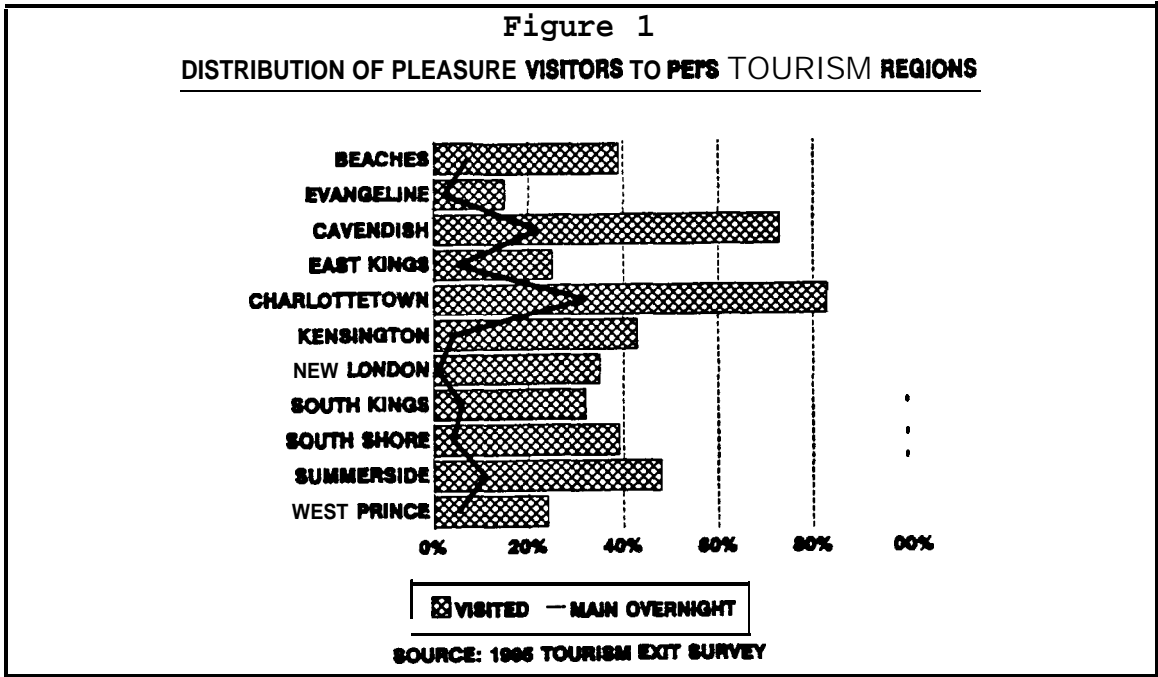
#### THE WEST PRINCE TOURISM PLANT

	1994	
	NUMBER OPERATIONS	NUMBER UNITS
<b>ACCOMMODATIONS</b>	59	279
CAMPGROUNDS ●	<b>8</b>	302
RESTAURANTS	<b>43</b>	--
ATTRACTIONS	15	--
<b>ACTIVITIES</b>	9	--
<b>CRAFTS/GIFT SHOP</b>	14	--

●Includes government campgrounds

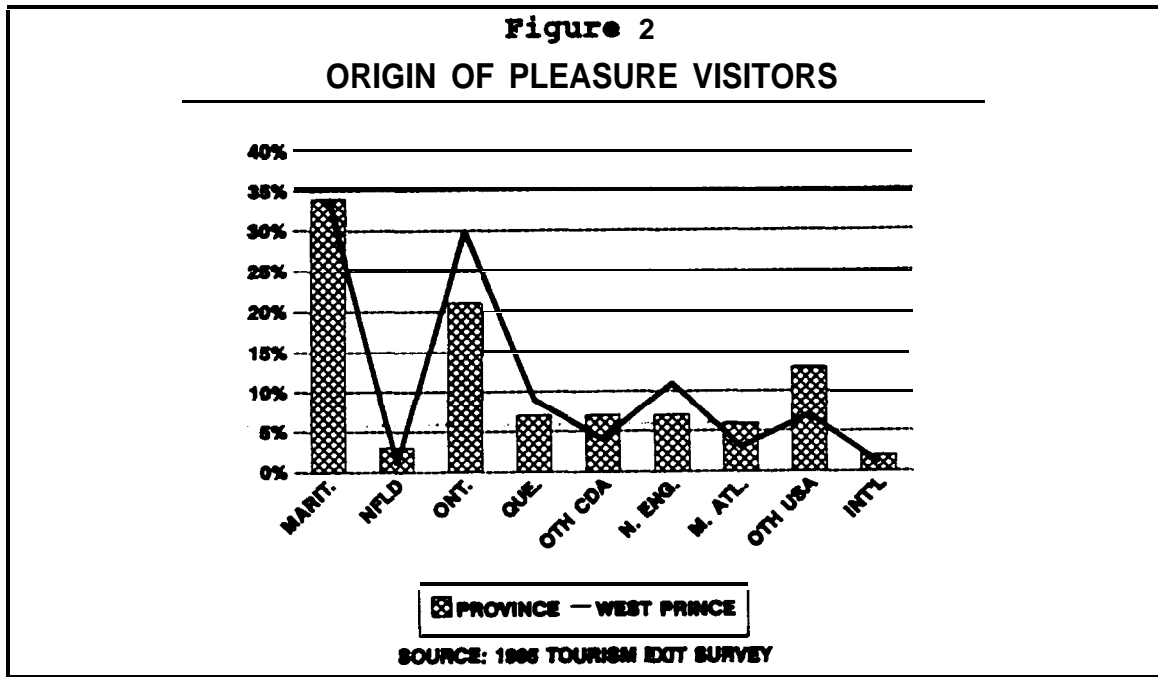
The 1995 Tourism Exit **Survey** concluded that 24% of all **pleasure** travelers to Prince Edward-Island (an estimated **163,980** visitors) visited the West Prince region. This region was the "**main**" overnight destination for 5% of all pleasure travelers (34,163 visitors), who stayed an average of 7.3 nights, occupying an equivalent of 124,695 room nights in paid and non-paid accommodations.

When compared to 1994 v-imitations, **the** West Prince tourism region experienced a 28% increase in **overnight pleasure visitation**. The length of time these pleasure visitors stayed overnight in the region remained at the 1994 level of 7.3 nights.

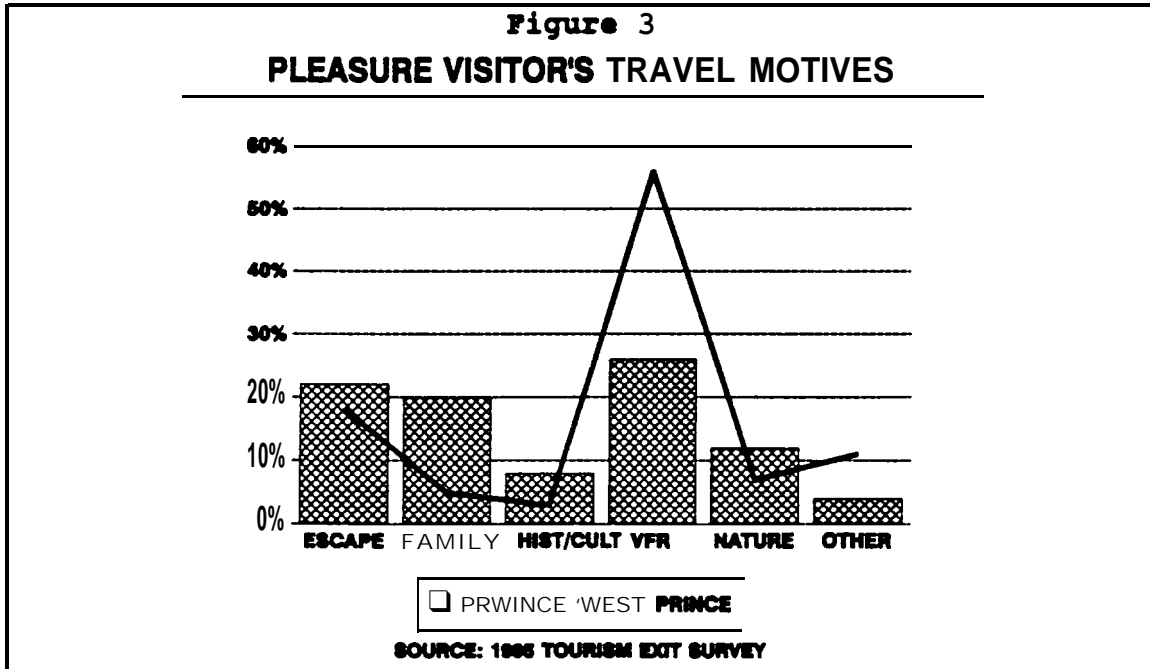


**Visitor Profile**

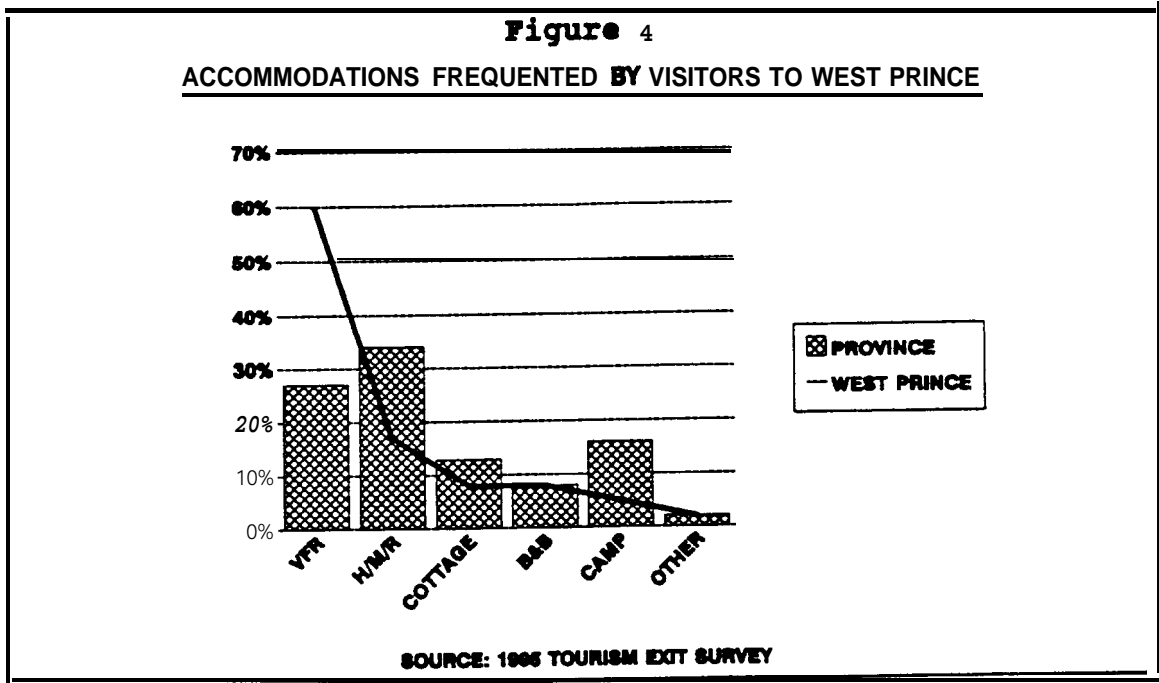
Thirty-four percent of all pleasure travelers that overnighted mainly in the West Prince area were Maritime vacationers and 30% were pleasure travelers from the province of Ontario. Twenty percent were American visitors, while the balance, 16%, were from other origins. Eighty-four percent of all visitors who overnighted in the West Prince tourism region were repeat visitors. Repeat visitation for West Prince is significantly higher than the provincial norm (59%). This may be attributed to very high VFR traffic.



Eighty-one percent of visitors who overnighted in West Prince were adult travelers, while the balance, 19%, were families. The majority of these **visitors** were over **40** years of age (75%). Given this region's appeal to the adult couples market, it is not surprising to find that 95% of visitors that overnighted in the West Prince area reported "non-family" travel motives. Visiting friends and relatives (56%), and relax and escape (**18%**) were primary travel motivators for these visitors.

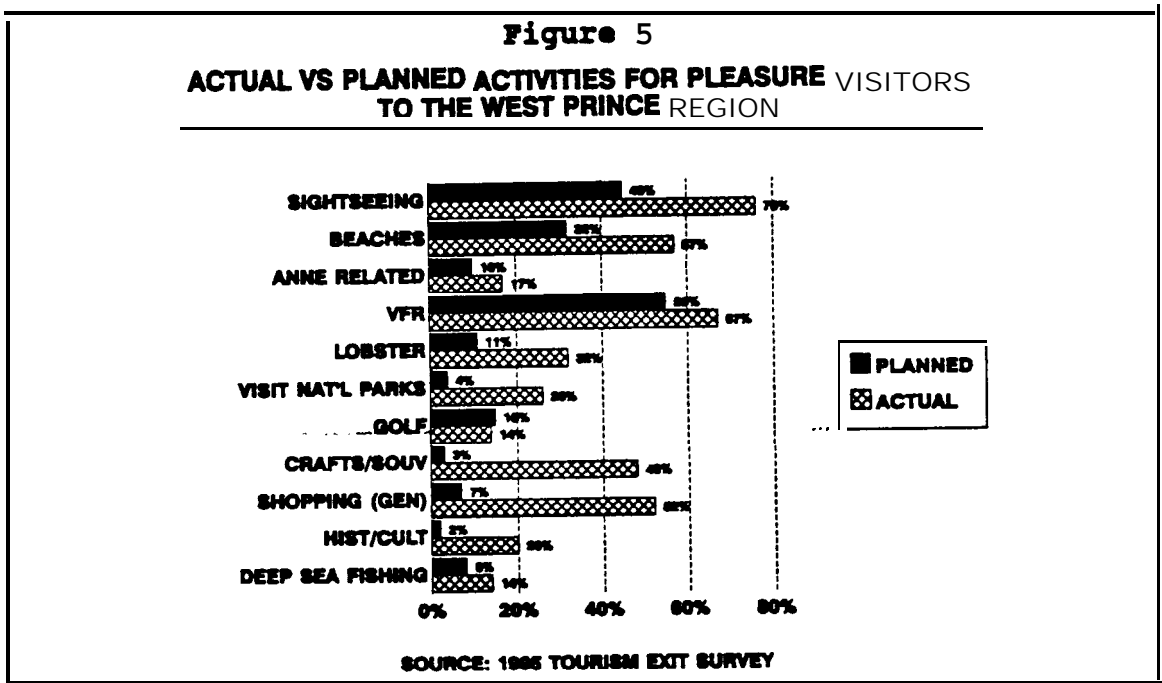


Sixty percent of all pleasure travelers that overnighted mainly in the West Prince tourism region stayed with friends/relatives in **non-**paid accommodations. An additional 33% of visitors stayed in fixed roof accommodations, while 7% stayed in campgrounds or trailer parks. When compared to provincial norms, West Prince attracted significantly more **VFR** travelers, while attracting significantly fewer hotel/motel and campground visitors.



**visitor Activities**

Visiting friends and relatives (55%), sightseeing (45%), and visiting the beaches (32%) were the top activities planned by visitors to West Prince. Other planned activities, albeit, at a much lower level, included golf and lobster suppers.



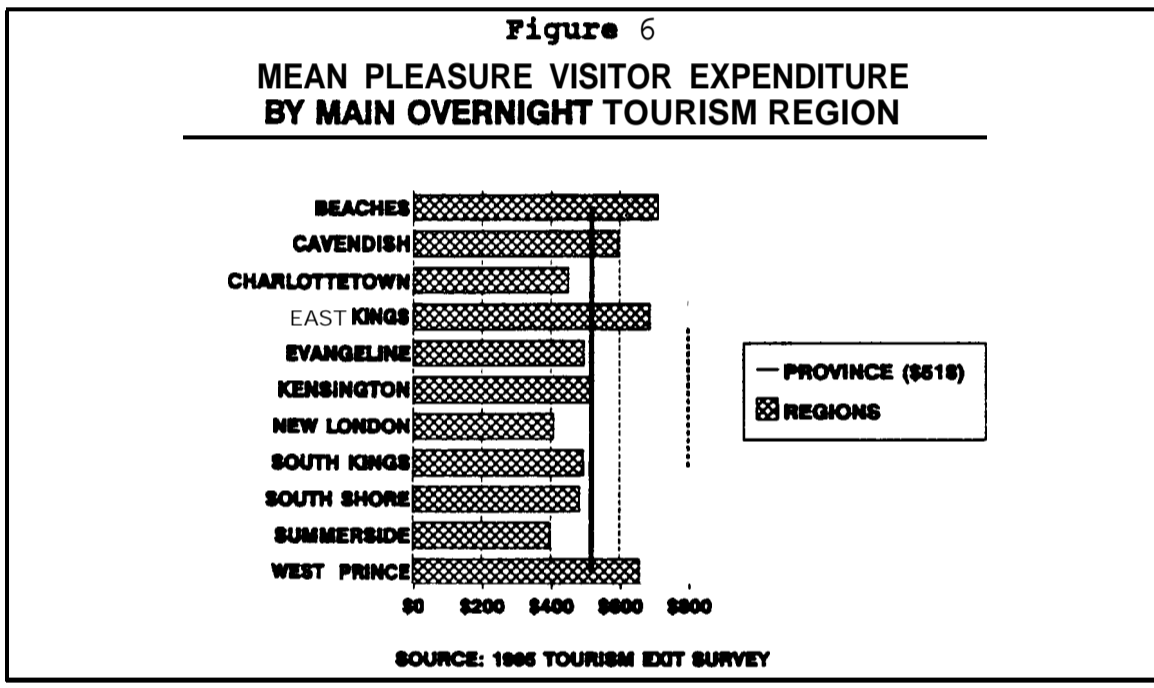


Visitors to West Prince actually participated in sightseeing (76%), VFR activities (67%), beach visits (57%), general shopping (52%) and crafts/souvenirs shopping (48%), more than other activities. These activities, combined with the region's seafood and its history and culture, should continue as the main lure to entice additional visitors to this region.

**Visitor Expenditures**

Visitors receipts for the West Prince tourism region are estimated at \$7.3 million. The mean party expenditure by those who overnighed mainly in the West Prince tourism region is estimated at \$657, 27% higher than the \$518 mean party expenditure recorded for the province. This expenditure included, on average, 2.2 people.

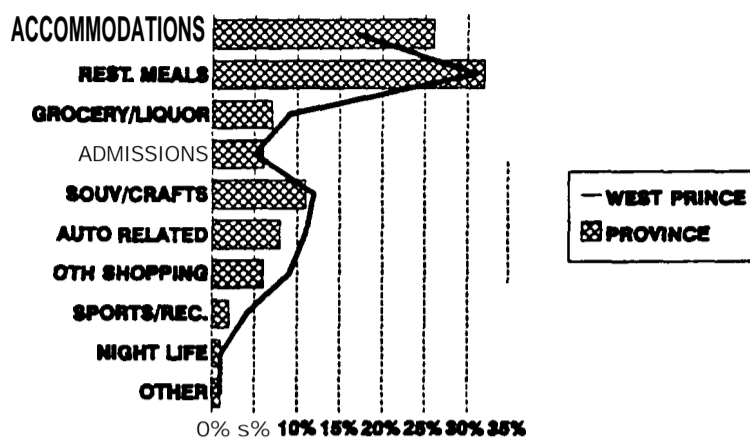
Accommodations, restaurant meals, and grocery/liquor purchases combined, represented 57% of total expenditures; while purchases of handicrafts, souvenirs and other shopping goods represented 21% of expenditures. Automobile expenses, admissions to attractions/events/sport and recreation amenities accounted for a further 20% of expenditures. Nightlife and miscellaneous expenses accounted for 2% of total expenditures.



When compared to provincial spending norms, visitors to West Prince tended to spend more against automobile expenses, grocery/liquor purchases and general shopping goods, while spending below provincial averages on accommodations.

Figure 7

### PERCENTAGE OF VISITOR EXPENDITURES ON VARIOUS TOURISM PRODUCTS



SOURCE: 1985 TOURISM EXIT SURVEY

## VII MOTORCOACH TRAVELLER PROFILE

### Motorcoach Visitations:

A survey of **motorcoach** tour operators suggests that between May 15 and October 31, 1995, approximately 724 **motorcoaches** visited Prince Edward Island, carrying 27,953 passengers. This represents a 2.5% increase when compared to 1994 levels. The average cost of a Maritime **motorcoach** tour package was \$1,750. An 11% decrease, when compared to 1994 tour rates.

### MOTORCOACH VISITATION COMPARISON

	1994	1995	+/-
<b>BUSES VISITING PEI</b>	<b>708</b>	724	2.3%
PASSENGERS	27,265	27,953	2.5%
AVERAGE BUS LOAD	38.51	38.61	.3%

### Expenditures:

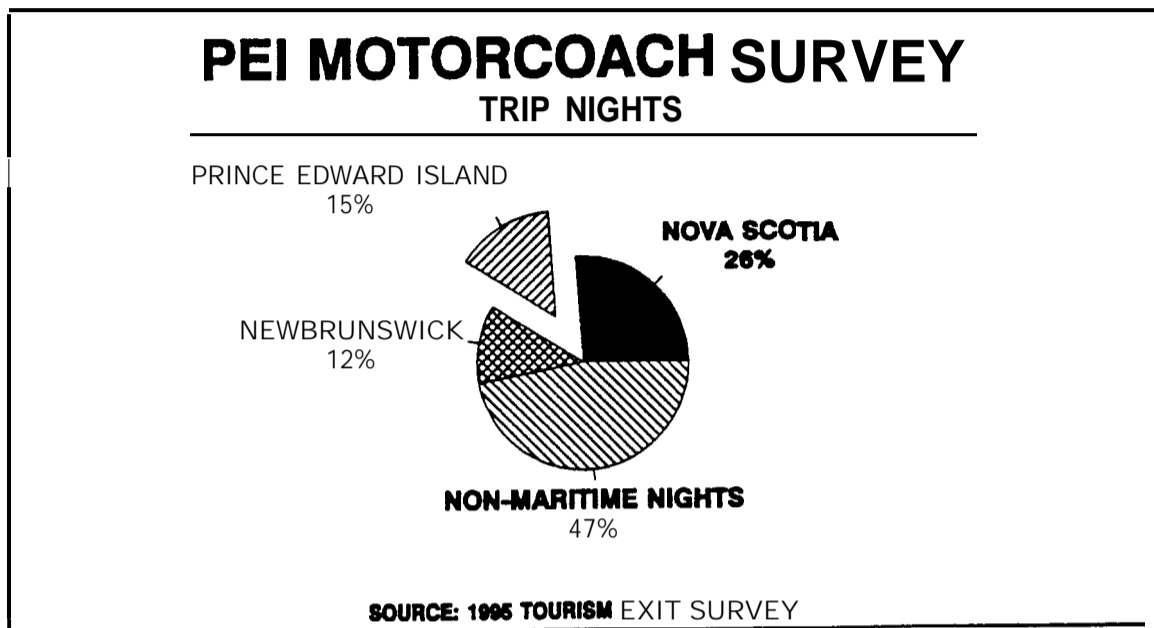
Provincial **motorcoach** receipts for 1995 are estimated at \$9.7 million and account for 7% of the province's total pleasure travel receipts. The average expenditure per party by a **motorcoach** visitor in 1995 was \$152.50, a decrease of 12% when compared to 1994 expenditure levels.

The majority of spending by motorcoach visitors was against restaurant meals (45%), crafts and souvenirs (41%). Other expenditures were against shopping for general merchandise and admissions.

EXPENDITURE CATEGORIES	%	TOTAL EXPENDITURES
RESTAURANT MEALS	44.8	\$1,060,941
SOUVENIRS/CRAFTS	41.3	<b>\$978,055</b>
<b>OTHER SHOPPING</b>	3.4	\$80,518
<b>ADM. TO EVENTS</b>	4.1	997,095
OTHER	6.4	\$151,563
SUB-TOTAL	100.0	<b>\$2,368,172</b>
<b>PEI'S SHARE OF TOUR COST</b>	15.0	\$7,337,662
TOTAL		<b>\$9,705,835</b>

**Demographic cs:**

The strong majority (84%) of **motorcoach** visitors to Prince Edward Island continue to be first time visitors. These visitors tend to be older, retired, married couples who travel to learn a new culture (29%) and experience nature (25%). The 1995 Exit Survey characterizes **motorcoach** visitors as: over 50 years of age (87%) ; retired (71%) ; household income of \$50,000 or less (56%); and USA residents (67%).



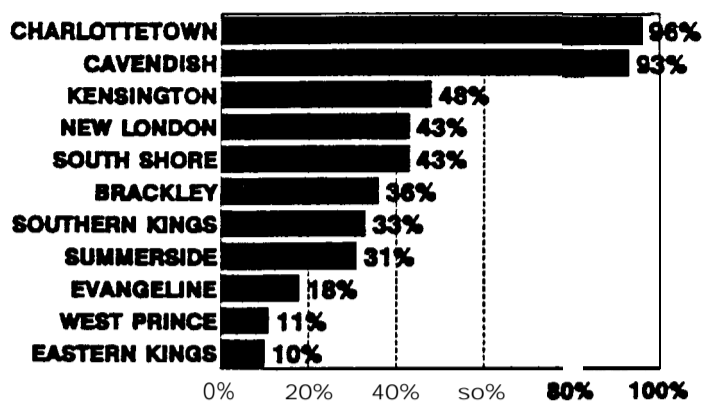
**Itineraries:**

**Motorcoach** tour companies tend to offer Prince Edward Island as one stop-over in a Maritime tour. While the average length of a Maritime tour is 12.9 nights, Prince Edward Island received 2.0 nights, for a 15% share of trip nights. Nova Scotia received the bulk of trip nights with a 26% share, while New Brunswick received a 12% share. The balance of trip nights (6 nights or 46% of trip nights) were spent traveling to and from the Maritime region.

The more popular **motorcoach** destinations on Prince Edward Island included the Charlottetown (96%) and Cavendish (93%) tourism regions. Other regions visited by **motorcoach** travelers, albeit less frequently, included the Kensington, New London, and Beaches Tourism Regions.

# PEI MOTORCOACH SURVEY

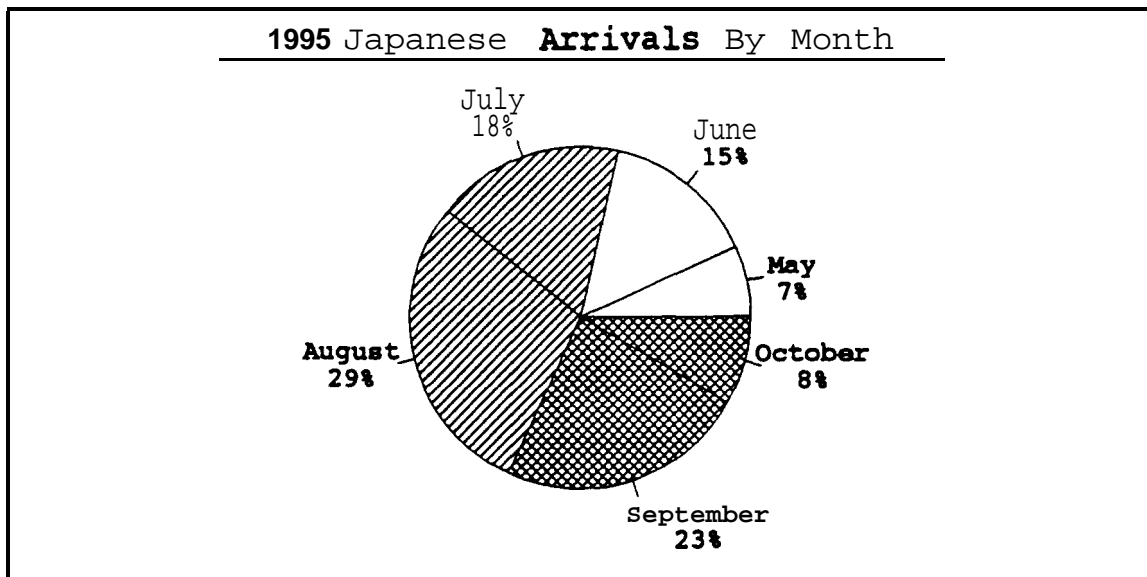
## AREAS VISITED



SOURCE: 1s0s TOURISM EXIT SURVEY

## VIII THE JAPANESE TRAVELLER PROFILE

During the 1995 tourist season, approximately 8,600 Japanese travelers visited Prince Edward Island, an increase of 15% when compared to 1994 Japanese visitation. This increase is due largely to the inclusion of May visitations in the 1995 Japanese report. Forty-seven percent of the Japanese visitors arrived during the summer season (July/August), with the balance visiting during shoulder periods.



Almost all Japanese respondents indicated at least one other destination was included in their trip itinerary, with Toronto (75%) and Vancouver (41%) being the cities most often also included. On average, Japanese visitors stayed 3.2 nights in Prince Edward Island. This gave PEI a 37% of Japanese trip nights.

Forty-four percent of Japanese visitors were couples traveling alone or with other couples and 41% were groups of friends. Families accounted for 10% of Japanese visitors, while single travelers represented 5% of Japanese visitors. The average travel party size for all Japanese visitors was 2.8 persons. A trend toward "couples" appears to be developing among Japanese visitors to PEI. In 1995, 44% of Japanese parties were couples; while in 1994, 21% were couples and in 1993, 15% of Japanese visitors were couples.

PARTY COMPOSITION	PERCENT
GROUP OF FRIENDS	41%
COUPLES	44%
FAMILIES	10%
SINGLE	5%

Japanese visitors who travelled with an organized tour reported spending an average of \$591.49 per expenditure party. In contrast, Japanese visitors who were not on a tour, spent \$1,021.69. The increase in spending may be due in part, to travel expenditures such as accommodations being included in tour packages. The combined average expenditure for all Japanese visitors is \$715.14 per party (average Japanese expenditure party size = 2.12 persons).

Based on visitations and party expenditure levels, it is estimated that Japanese visitors contributed \$2.4 million dollars to Prince Edward Island tourism industry in 1995.

Forty-eight percent of Japanese expenditures were against gifts, such as PEI handcrafts/souvenirs. Nineteen percent of Japanese visitor spending was on accommodations. The following table breaks down expenditures reported by Japanese visitors.

<b>EXPENDITURE CATEGORY</b>	<b>% OF TOTAL EXPEND.</b>	<b>PROJECTED TOTAL EXPENDITURE</b>
<b>CRAFTS/SOUVENIRS</b>	48.0	<b>\$1,144,030</b>
<b>*ACCOMMODATIONS</b>	<b>18.8</b>	<b>\$ 447,809</b>
RESTAURANT MEALS	15.3	<b>\$ 363,630</b>
<b>CITY/LAND/HARBOUR TOURS</b>	5.2	<b>\$ 123,673</b>
AUTO RELATED	4.1	<b>\$ 97,222</b>
<b>LIVE THEATRE</b>	2.5	<b>\$ 60,207</b>
HISTORY/CULTURE	1.3	<b>\$ 31,693</b>
SPORTING AMENITIES	0.4	<b>\$ 10,485</b>
OTHER	4.4	<b>\$ 104,371</b>
<b>TOTAL</b>	100	<b>\$2,382,900</b>

(\*Note: Results should be read with caution. A large percentage of Japanese respondents (49.1%, n=190) reported no spending on accommodations, likely due to the purchase of accommodation-inclusive packages prior to departure. This will tend to underestimate the accommodation spending total and skew spending percentages higher in other expenditure categories. Expenditure results for other categories, such as restaurant meals and live theatre, may also be affected by the purchase of travel packages.)

## IX BUSINESS TRAVELLER PROFILE

### Business Traveller Projections:

Twelve percent (94,650 visitors) of all visitors to Prince Edward **Island** between May 15 and October 31, 1995 were business travelers. Tourism receipts for business travelers are estimated at \$31.3 million, 18% of total provincial visitor receipts.

### Business Traveller Profile:

Seventy-four percent of all business travelers to PEI in 1995 were males, who tended to be **over 40 years** of age (61%) and had annual household incomes (61%) that were in excess of \$50,000. The strong majority of business travelers (81%) to PEI in 1995 were repeat visitors. Fifty-six percent of business travelers visited PEI during the shoulder tourism season, while 44% conducted their business during the peak season. This suggests that the majority of businesses travel in the off season as a means of controlling business travel expenses and avoiding crowds.

The primary travel motivators for business travelers were attending: meetings (25%) ; customer service visits (24%) ; conventions (15%) ; and sales calls (19%). The average number of nights spent on the Island conducting business was 5.5 nights, an **increase** of **0.6** nights when compared to 1994 levels.

### Origin of Business Travelers:

Not surprisingly, a strong majority of business travelers (67%) were from the Maritime provinces. Fourteen percent were Ontarians, and 12% were of other Canadian origins. The balance, 7%, **were** of US and international origins.

ORIGIN OF BUSINESS TRAVELERS

ORIGIN	%	PROJECTED NUMBER
<b>MARITIMES</b>	67	63,421
<b>NEWFOUNDLAND</b>	4	3,773
<b>ONTARIO</b>	14	<b>13,256</b>
<b>QUEBEC</b>	<b>3</b>	2,040
<b>OTHER CANADA</b>	<b>5</b>	4,732
<b>UNITED STATES</b>	4	3,708
<b>INTERNATIONAL</b>	3	2,840



Activities:

The most popular tourist related activity for business travelers while visiting Prince Edward Island was sightseeing (64%). Other pleasure activities that business travelers tended to participated in, albeit to a lesser extent, included: beach visits (43%), craft/souvenir shopping (28%), **general merchandise shopping (37%)**, attending lobster suppers (24%), and playing golf (25%).

Accommodations:

Hotel/Motel accommodations were preferred by the majority (78%) of business travelers. The strong majority (**91%**) of these business travelers indicated that their accommodations met or exceeded their expectations.

Expenditures:

Seventy-five percent of all business expenditures were against accommodations (38%) and restaurant meals (35%). Nine percent of business expenditures were auto related, while 9% was against craft/souvenir and general shopping merchandise. The balance of expenditures were against other products.

**BUSINESS TRAVELERS EXPENDITURES**

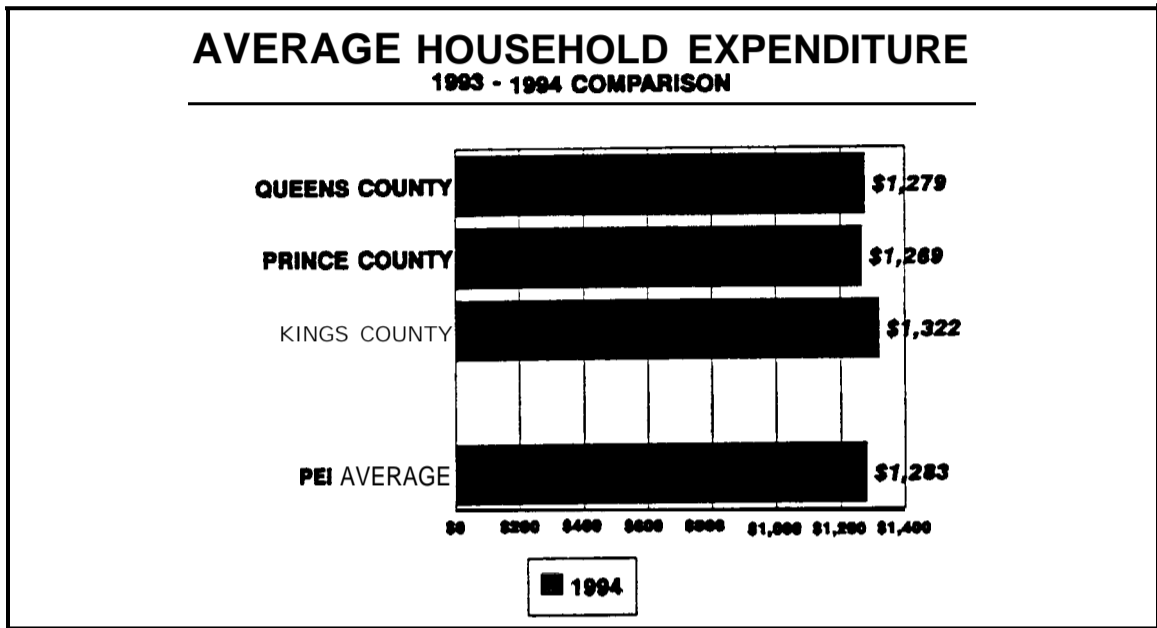
<b>CATEGORY</b>	<b>%</b>	<b>PROJECTED DOLLARS</b>
ACCOMMODATIONS	38	\$ 11,894,000
<b>RESTAURANT MEALS</b>	35	<b>\$10,955,000</b>
GROCERIES & LIQUOR	3	\$939,000
ADMISSION TO EVENTS	2	\$626,000
<b>SOUVENIRS/HANDCRAFTS</b>	5	<b>\$1,565,000</b>
AUTO RELATED	9	<b>\$2,817,000</b>
OTHER SHOPPING	4	\$1,252,000
SPORTS/RECREATION	2	\$626,000
<b>NIGHT ENTERTAINMENT EXPENSES</b>	2	<b>\$626,000</b>

Transportation:

Seventy **percent** of all business travelers arrived on PEI **by** automobile, while 25% arrived by air. Five percent of all business travelers were truck (tractor trailer) drivers.

## X THE ISLAND RESIDENT: TOURISM EXPENDITURES

The Island Resident **Survey** was administered to a representative sample of PEI resident households between June 12 and September 10, 1994. The purpose of this study was two-fold: to measure "immediate family" household expenditures on tourism products in 1994 and to measure incremental household expenditures while entertaining or hosting off-Island friends or relatives. A total of 251 households, proportionally distributed over each of **PEI's** three counties, participated in the survey.



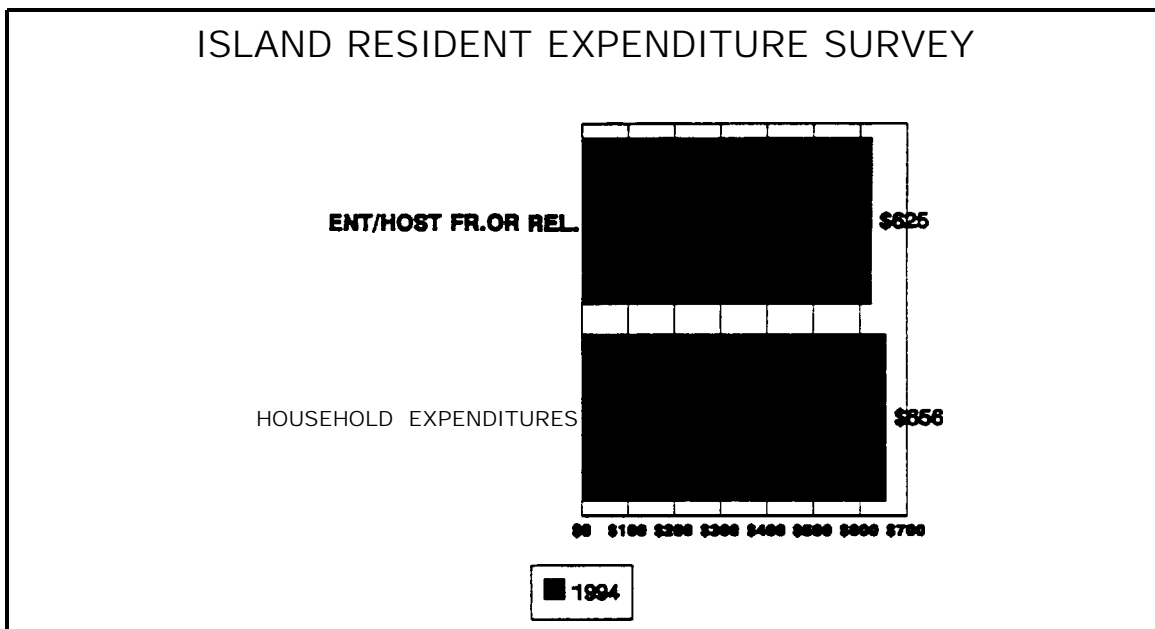
The data collected suggests that between June 12 and September 10, 1994, PEI residents spent a total of \$43,471,916.53 against tourism related products, an increase of 7.5% (\$3,013,782) when compared to 1993 levels. The average expenditure per household is estimated at \$1,283.00. Based on the sample drawn, 51% of expenditures were made by residents of Queens County, 34% were made by residents of Prince County and 15% were made by Kings County residents.

**ISLAND RESIDENT TOURISM EXPENDITURE  
PROJECTED ECONOMIC IMPACT**

COUNTY	AVERAGE EXPENDITURE PER HOUSEHOLD	*HOUSEHOLDS PER COUNTY	PROJECTED EXPENDITURE PER COUNTY
QUEENS	\$1,280	17,395	\$22.2
PRINCE	\$1,270	11,570	\$14.7
KINGS	\$1,323	4,930	\$ 6.5
TOTAL	\$1,283	33,895	\$43.5

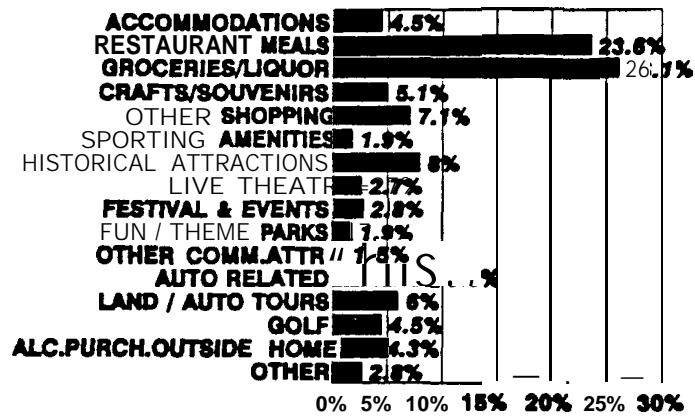
\* Province of Prince Edward Island Nineteenth Annual Statistical Review.

Fifty-one percent of total resident spending against tourism products was by "immediate family" households, while 49% was by households that "entertained or hosted" off-Island friends and relatives. 1994 expenditure levels by residents who entertained or hosted off-Island friends or relatives were marginally higher (5%) than 1993 levels, while expenditures by immediate family households were 10% above 1993 levels.



As in 1993, a significant proportion of **resident** spending on tourism related product (54%) was food related. Twenty-six percent of spending was against additional grocery/liquor products, 24% was on restaurant meals, and 4% was against alcohol purchases outside the home. The balance of spending was against automotive expenses and other, more traditional tourism products, including historical attractions, general merchandise shopping, tours, crafts/souvenirs, golf, and other products.

# ISLAND RESIDENT EXPENDITURES



EXPENSES

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