
A PROFILE OF MOTOR COACH TOURISTS:

Results from the 2014 PEI Survey of Motor Coach Tourists

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
1. INTRODUCTION	3
1.1. Background.....	3
1.2. The Study Purpose	4
2. METHODOLOGY	5
2.1. Sampling Procedure	5
2.2. Surveys Collected and Used.....	6
2.3. Data Processing and Weighting	7
2.4. Survey Instrument	9
3. Motor Coach Market Trends.....	10
3.1. Trends in Motor Coach Tourists to PEI.....	10
3.2. Trends in Overnight Stays by Motor Coach Tourists in PEI.....	11
4. Key Indicators and Estimated Total Direct Expenditures.....	13
4.1. Summary of Key Indicators	13
4.2. Estimated Total Direct Expenditures	15
5. A Profile of Motor Coach Tourists.....	17
5.1. Origin of Travel Parties	17
5.2. Party and Age Composition and Average Party Size	19
5.3. Gender and Age of Motor Coach Tourists	20
5.4. Average Length of Stay and PEI Regions Visited During the Trip.....	21
5.5. Type of Visitation, Last Trip to PEI, and Average Number of Times Visited PEI	22
5.6. Primary Feature That Attracted Motor Coach Tourists to PEI.....	23
5.7. Activities Participated in While in PEI	24
5.8. Average Spending on Pre-paid Tour Package	25
5.9. Evaluation of the Trip and Future Behavioural Intentions.....	26
5.10. Instances of Complaints	28
5.11. Intention to Return to PEI	29
5.12. Comments	30
5.13. Demographic Characteristics of Respondents	31
6. Impact of the PEI 2014 Celebrations on Motor Coach Tourists' Direct Spending in PEI	34
6.1. Awareness of the PEI 2014 Celebrations Before Travelling to PEI	34
6.2. Participation in the PEI 2014 Celebrations While in PEI	35
6.3. Influence of the PEI 2014 Celebrations on the Decision to Travel to PEI.....	36
6.4. Motor Coach Tourists' Direct Expenditures that Resulted from the PEI 2014 Celebrations	37
6.5. Motor Coach Tourists' Total Direct Expenditures for Their Entire PEI Trip in 2014	39
6.6. Impact of the PEI 2014 Celebrations on Motor Coach Tourists' Direct Expenditures	41

EXECUTIVE SUMMARY

A motor coach tourist survey is a tool used to measure the impact of motor coach tourists on a destination and to profile these visitors. A motor coach tourist survey can capture demographic information of motor coach tourists and information about their visits such as the ages of visitors, travel party size, activities participated in, expenditures, and trip evaluation.

In 2014, a motor coach tourist survey was conducted in Prince Edward Island (PEI). Data was collected via mail-back and online surveys distributed to motor coach tourists at select accommodation operators. The motor coach tourist survey was conducted in 2014 for two main purposes: 1) to provide a full range of statistics on the volume of motor coach tourists to PEI and detailed characteristics of their visit to PEI, and 2) to gather information to evaluate the impacts of special celebrations that took place in PEI in 2014 to celebrate and commemorate the 150th anniversary of the 1864 Charlottetown Conference, where the idea of Canadian Confederation was first discussed (hereafter referred to as “PEI 2014 celebrations”).

In total, 205 surveys were used in the 2014 PEI motor coach tourist study. In terms of statistical accuracy, a sample of this size has a sampling error of ± 6.78 percent at a 95 percent confidence level.

A total of 21,002 motor coach tourists, in 10,991 parties, visited PEI in 2014. In total, motor coach tourists spent 21,725 nights in PEI in 2014. These results continued an upward trend in motor coach visitation to PEI in recent years. In 2014, the number of overnight stays by motor coach tourists was highest during August and September, followed by July, June and October.

On average, motor coach travel parties were comprised of 1.91 people. About 77 percent of parties were comprised of two adults. Over three-quarters (76.2%) of motor coach parties were from the United States while 11.8 percent were from Canada and 12.0 percent were from another country. More than one-quarter (26.2%) of parties were from the South Atlantic United States.

Sixty-five percent of motor coach tourists were female. One-half were between the ages of 65 and 74, while 23.6 percent were between the ages of 55 and 64, and 14.3 percent were aged 75 and over. Only about 2 percent of motor coach tourists were under the age of 35.

Total direct expenditures by motor coach tourists who visited PEI in 2014 totalled more than \$7.4 million. This includes the portion of the cost of the motor coach tour package that is considered expenditures in PEI. Tour package expenditures accounted for \$5.4 million in expenditures in PEI, or 73.5 percent of total direct expenditures. The other items that accounted for the largest proportion of motor coach parties' expenditures were shopping (\$1.1 million; 14.9% of total expenditures) and food and beverage at restaurants and bars

(\$517,471; 7.0%). On average, motor coach tourists spent \$178.32 per person per day and \$673.54 per party per visit in PEI in 2014.

Motor coach parties spent an average of 1.98 nights in PEI. They visited various regions of PEI and participated in a variety of activities during their visit. The most popular regions of visitation were the Points East Coastal Drive region and the Greater Charlottetown Area. Nearly all parties visited Anne of Green Gables attractions and went sightseeing and/or took a driving tour. Other popular activities included sampling local culinary products, visiting historical and cultural attractions, shopping for local crafts, souvenirs and antiques, and visiting a national or provincial park.

About one-half of motor coach parties were attracted to PEI by the natural beauty and pastoral settings and 21.8 percent were attracted by Anne of Green Gables and Lucy Maud Montgomery attractions.

The vast majority of motor coach parties rated various aspects of their trip as good or excellent. This included such things as the quality of attractions and events, quality of customer service, variety of things to see and do, and accommodation and restaurant service and quality. Over 90 percent of parties agreed that their time spent in PEI was excellent, their trip to PEI was good value for money spent, suitable activities were offered during the visit to PEI, and they were satisfied with their time in PEI. Ninety-seven percent of motor coach parties indicated they would recommend PEI as a travel destination to others.

Only 2.0 percent of motor coach parties indicated they had experienced a problem or had a complaint that would impact their decision to return to PEI, or would deter them from recommending PEI to others. Seventy-nine percent of respondents who provided additional comments about their time in PEI had something positive to say. Most of the positive comments related to beautiful scenery, friendly people, good hospitality, and general enjoyment of their time in PEI.

Twenty-two percent of those who provided additional comments had negative feedback or suggestions for improvement, but many of these comments related to aspects of the motor coach tour such as an unacceptable amount of time spent at places on the tour of PEI, a lack of free time to explore on their own, and some issues with accommodations in PEI.

About 23 percent of motor coach parties were aware of the PEI 2014 celebrations before they travelled to PEI and 6.7 percent participated in a PEI 2014 event during their visit to PEI. The PEI 2014 celebrations did not influence motor coach parties' decision to visit PEI. Direct expenditures that resulted from motor coach parties' attendance of PEI 2014 events totalled \$38,046 and included food and beverage and shopping expenditures at PEI 2014 events. This accounted for 0.5 percent of total direct tourism expenditures by these visitors in PEI in 2014.

1. INTRODUCTION

1.1. Background

- A motor coach tourist survey is a tool used to measure the impact of motor coach tourists on a destination and to profile these visitors.
- A survey of motor coach tourists can capture demographic information of visitors and trip characteristics such as the ages of visitors, travel party size, length of stay, activities participated in, expenditures, and trip evaluation.
- For Prince Edward Island (PEI), a survey of motor coach tourists has been conducted as a supplement to the year-long PEI visitor exit survey that is conducted periodically. The PEI visitor exit survey was conducted in 2014 to update existing historical information about visitors to PEI and to evaluate the impacts of special celebrations that were held in 2014 to celebrate and commemorate the 150th anniversary of the 1864 Charlottetown Conference, where the idea of Canadian Confederation was first discussed (hereafter referred to as “PEI 2014 celebrations”).
- The PEI motor coach tourist survey was conducted in 2014 for the same purposes – to update existing historical information about motor coach tourists and to evaluate the impacts of the PEI 2014 celebrations.
- Prior to 2014, the PEI motor coach tourist survey had most recently been conducted in 2007.
- The motor coach tourist survey was distributed to motor coach tourists by accommodation operators as the tourists checked out of their room. Attached to the survey was a pre-paid, pre-addressed envelope that respondents could use to return the survey. The survey also included a web address that respondents could use to access the online version of the survey rather than completing the paper copy.
- More details about the methodology of the 2014 PEI motor coach tourist survey are provided in Chapter 2.

1.2. The Study Purpose

- The main purpose of the 2014 PEI motor coach tourist survey was to provide a full range of related statistics on the volume of motor coach tourists to PEI and detailed characteristics of their visits such as travel party size, ages of visitors, activities participated in, regions visited, expenditures, and trip evaluation.
- The year 2014 marked the 150th anniversary of the 1864 Charlottetown Conference, where the idea of Canadian Confederation was first discussed. Many activities and events took place throughout PEI in 2014 to celebrate and commemorate this historical anniversary. It was expected that the celebrations would attract a greater number of visitors to PEI in 2014 and have positive socio-cultural impacts on the province. As a result, the Centre for Tourism Research was commissioned to conduct research on the PEI 2014 celebrations to evaluate the impacts of the celebrations on the province in 2014.
- Many activities and events related to the PEI 2014 celebrations were held during the motor coach season so motor coach tourists were included in the PEI 2014 research by the addition of PEI 2014-related questions to the motor coach tourist survey (discussed in Section 2.4).
- The survey pursued seven broad objectives:
 - To update existing historical information on motor coach tourists and their overnight stays in Prince Edward Island.
 - To gather information regarding motor coach tourist behaviours.
 - To identify key market segments of motor coach tourists to PEI.
 - To determine if motor coach tourists were aware of the PEI 2014 celebrations and if so, the level of influence the celebrations had on their decision to visit PEI in 2014.
 - To determine the level of participation in the PEI 2014 celebrations and events by motor coach tourists.
 - To enhance our knowledge and understanding of tourism (in general, and for PEI).
 - To collect critical data to measure the overall importance of tourism in PEI.

2. METHODOLOGY

2.1. Sampling Procedure

Target Population

- The target population was motor coach tourists who stayed overnight in PEI in 2014.
- Mail-back questionnaires were randomly distributed to motor coach tourists at select accommodation operators on the basis of planned survey dates in each month.

Mail-back Questionnaires and Online Survey

- The mail-back questionnaires were distributed by front desk staff of select accommodation operators used by motor coach tours in PEI. The accommodation operators were provided with packages of surveys that were labelled with the date they were to be delivered to motor coach tourists. The distribution schedule was based on motor coach arrival and departure dates that were provided by the accommodation operators.
- The mail-back questionnaire included a web address for the online version of the survey. Individuals who received the questionnaire had the option of completing the hard-copy questionnaire or the online version.
- Responding to the survey was voluntary.

2.2. Surveys Collected and Used

Survey Distribution and Samples

- In total, 215 surveys were collected and 205 surveys were used in the study.
- About 51 percent of the surveys that were used were completed by motor coach tourists who visited PEI during the main season of July and August. The remainder were completed by motor coach tourists who visited PEI during the other months of the year.

Table 1
Survey Statistics and Samples

	Surveys Collected	Surveys Used	Use Rate
By Season			
Main Season	111	104	93.7%
Other Season	104	101	97.1%
Total	215	205	95.3%

Sample Size and Margin of Error

- The approximate margin of error associated with the total sample and specific sub-groups (by season) used in this report is shown in Table 2.
- In terms of statistical accuracy, the actual margin of error for each market will vary slightly due to minor variations in the sample size.
- Overall, a sample of this size has a sampling error of ± 6.78 percent at a 95 percent confidence level, though the margins of error for the two sub-groups of seasons are higher (Main Season = $\pm 9.51\%$; and Other Season = $\pm 9.66\%$).
- Note that this is a guideline only. The same caution should be applied when interpreting significance testing throughout this report.

Table 2
Sample Size and Margin of Error

	Sample Size	Margin of Error ^{a)}
By Season		
Main Season	104	± 9.51
Other Season	101	± 9.66
Total	205	± 6.78

Note: ^{a)} Margin of error indicates % of total number of motor coach tourist parties used in each sub-group at the 95% confidence level.

2.3. Data Processing and Weighting

Data Processing and Error Detection

- This study of PEI motor coach tourists involved many steps of data processing.
- All mail-back questionnaires were manually reviewed to determine if they were complete and coherent.
- Data were then captured, coded and verified, and then merged with online survey data.
- Electronic verifications were also made to identify any outliers and to correct them.
- Statistical reliability and validity tests, and consistency controls were also conducted during this process.

Data Imputation

- For the 2014 PEI motor coach tourist study, some data were imputed. For example, missing travel party size and/or total trip spending were imputed if the remainder of the fields on the questionnaire was valid.
- The target populations were partitioned into two seasons: main season (July and August) and other season (all other months).
- Total imputation was carried out for all the factors above and for strata that were outside the scope of the questionnaire distribution.
- For these out-of-scope factors, the characteristics of motor coach tourists were estimated using the 2007 PEI survey of motor coach tourists and the 2014 PEI visitor exit survey.
- Total imputation was also performed for any in-scope factors that received an insufficient number of surveys for some specific segments to meet minimum requirements (combination of minimum number of questionnaires and maximum weight) based on the monthly counts of motor coach tourists and overnight stays by motor coach tourists.

Bias Adjustment and Weighting the Sample

- For estimation purposes, the responses obtained through the questionnaires must be treated as a simple random sample from the total motor coach tourists and their overnight stays in PEI in each stratum (by month).

- The data may be subject to some degree of “*distribution bias*” due to the fact that not all categories of motor coach tourists and their overnight stays are represented in the distribution or to a “*non-response bias*” due to the fact that the individuals replying may not be representative of the motor coach tourist population.
- Weighting techniques used in the estimation process attempt to reduce the effect of biases and were also performed to determine aggregate motor coach travel parties’ characteristics. Therefore, using the calculated weights, estimates can be obtained for a variety of motor coach tourist characteristics. These estimates take the form of totals, averages and percentages, and can be obtained at different levels.
- For this report, the final survey sample was weighted by two seasons (main season and other season) to align it with the total motor coach travel parties.
- Weighting factors were calculated by using a mix of overnight stays by motor coach tourists provided by the PEI Department of Economic Development and Tourism, and results obtained from the mail-back and online surveys.
- According to the results of the volume of motor coach tourists, it was estimated that 21,002 motor coach tourists in 10,991 parties visited PEI in 2014.
 - Main season: 9,747 tourists (46.4%) and 4,802 parties (43.7%)
 - Other season: 11,255 tourists (53.6%) and 6,189 parties (56.3%)
- These figures (number of parties) were used to weight the survey data and adjust the survey results. Therefore, results in this report are based on the weighting values rather than on the raw scores of the sample.
- However, note that results may not reflect all actual responses of each party or individuals in the party because the application of the weighting scheme was based only on the number of motor coach travel parties by two seasons, not based on all survey questions.

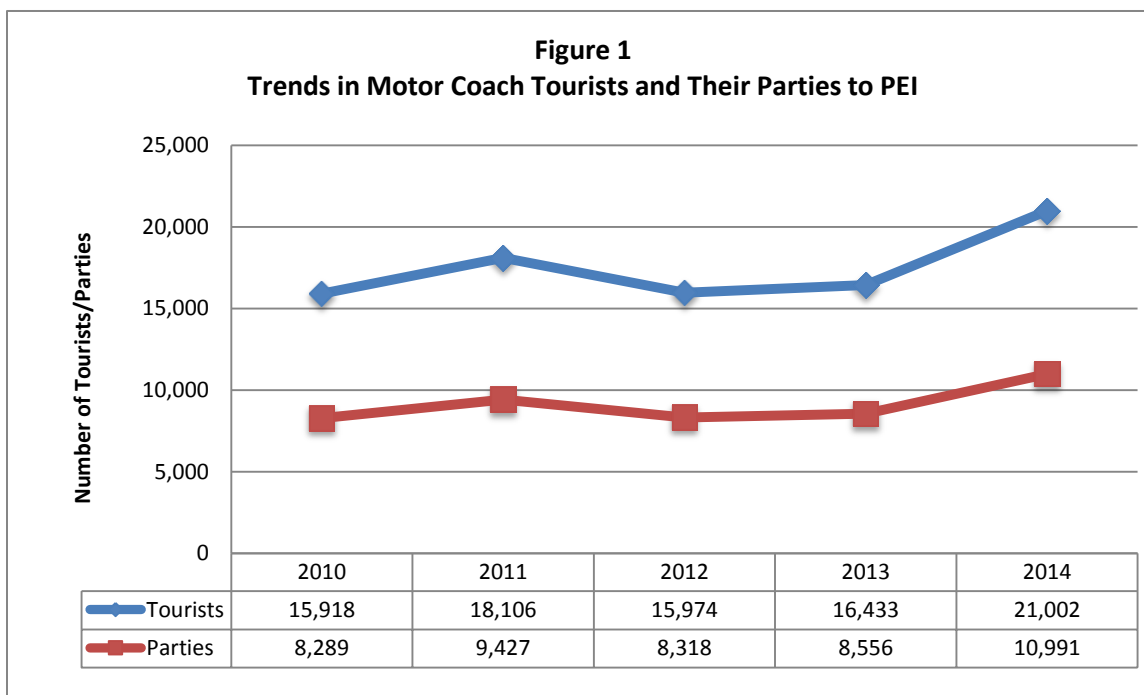
2.4. Survey Instrument

- The PEI motor coach tourist survey gathers information on the travel habits of motor coach tourists visiting the province. Below is a list of information available from the questionnaire:
 - Usual place of residence (country, province/state, postal code/zip code, city)
 - Date of entry and exit (day, month, year)
 - Travel party size
 - Age and gender composition of travel party
 - Activities participated in
 - Regions visited
 - Previous visitation to PEI
 - Primary reason for booking a motor coach tour that included PEI
 - Per person price of the motor coach tour and number of nights included in the tour
 - Total expenditures in PEI
 - Evaluation of PEI
 - Intentions to revisit PEI
 - Instances of problems or complaints
 - Demographic information
- In addition to the above, the 2014 PEI survey of motor coach tourists included questions related to the PEI 2014 celebrations. These questions included the following:
 - Did you hear about PEI 2014 celebrations/events before travelling to Prince Edward Island?
 - Did you partake in any PEI 2014 celebrations/events while in Prince Edward Island?
 - If yes, which PEI 2014 event(s) did you partake in? (Please specify)
 - If yes, to what extent did attending PEI 2014 event(s) influence your decision to travel to PEI? That is, did it account for 0% of your decision, 100% of your decision, or some percentage in between?
 - The survey question that asked about travel party expenditures in PEI included two items related to the PEI 2014 celebrations:
 - Spending on food and beverage at PEI 2014 events (if attended PEI 2014 event)
 - Shopping expenditures at PEI 2014 events (if attended PEI 2014 event)

3. Motor Coach Market Trends

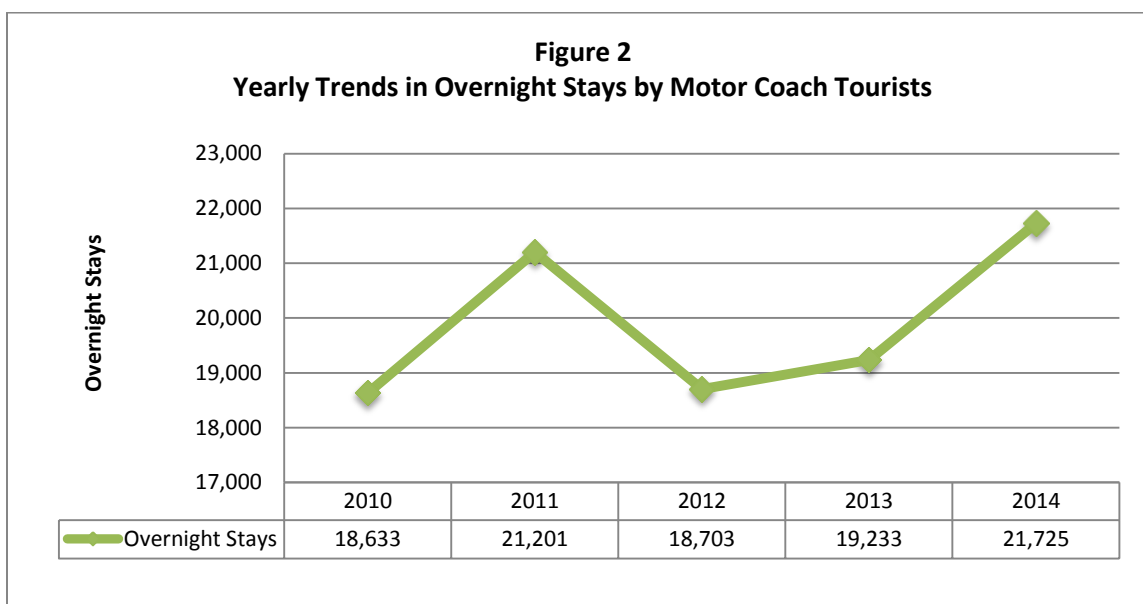
3.1. Trends in Motor Coach Tourists to PEI

- The number of motor coach tourists visiting PEI declined in 2012 from 2011 levels but has been on an upward trend in recent years with 2014 seeing the highest number of motor coach tourists in the past five years.
- In 2014, the number of motor coach tourists increased by 27.8 percent compared to 2013 to 21,002 motor coach tourists.

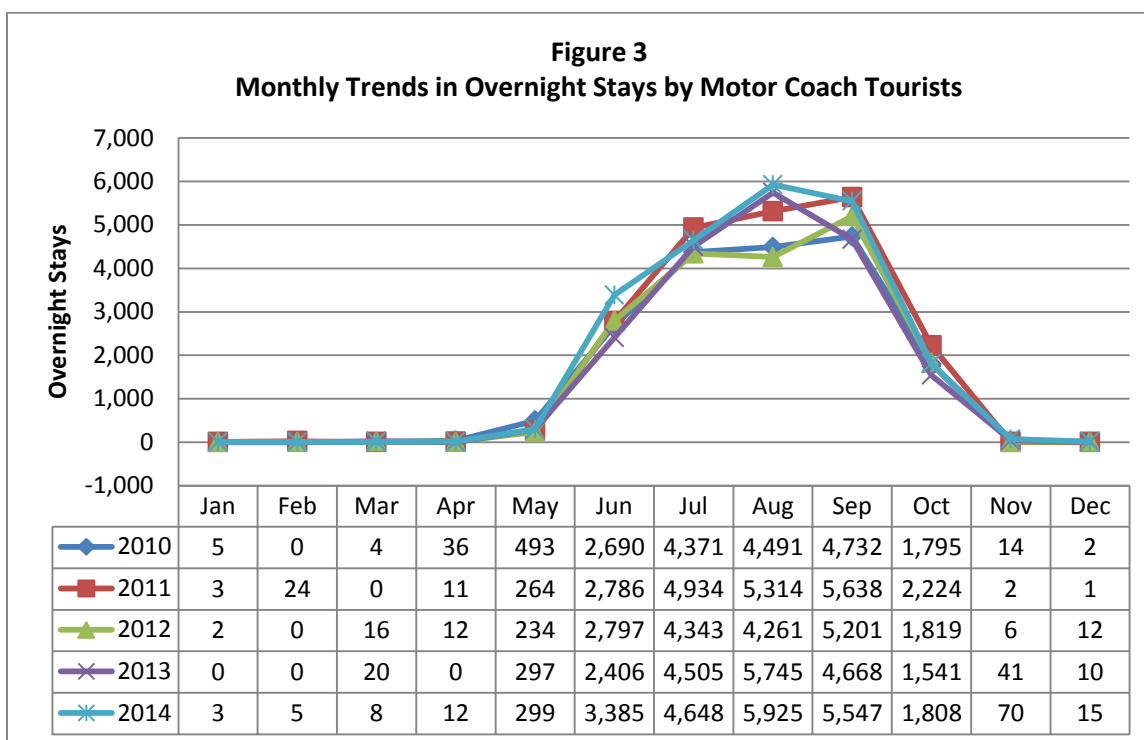


3.2. Trends in Overnight Stays by Motor Coach Tourists in PEI

- As expected, the number of overnight stays in PEI by motor coach tourists followed a similar trend as the number of motor coach tourists visiting PEI. The number of overnights stays declined between 2011 and 2012 but has been increasing in recent years.
- In 2014, the number of overnight stays in PEI by motor coach tourists was 21,725, the highest of the past five years.
- During 2010-2012, September was the month with the largest number of overnight stays by motor coach tourists while August had the largest number of overnight stays by motor coach tourists in 2013 and 2014.
- Between 2010 and 2014, about three-quarters of overnight stays by motor coach tourists in PEI were during July, August or September. June and October were also popular months for motor coach visitation.
- In recent years, the number of overnight stays by motor coach tourists during November and December has increased.



Note: Overnight stays by motor coach tourists include both fixed-roof room nights and camp site nights sold.



Note: Overnight stays by motor coach tourists include both fixed-roof room nights and camp site nights sold.

4. Key Indicators and Estimated Total Direct Expenditures

4.1. Summary of Key Indicators

- Motor coach tourists spent a total of 21,725 nights in PEI in 2014.
- On average, motor coach tourists spent about two nights in PEI.
- A total of 21,002 motor coach tourists visited PEI in 2014.
- At an average party size of 1.91 people, this means that approximately 10,991 motor coach tourist parties visited the province.
- Including expenditures related to the motor coach tour package, total direct expenditures by motor coach tourists to PEI were over \$7.4 million.
- Motor coach tourists spent an average of \$673.54 per party per visit and \$178.32 per person per night, including tour package expenditures.

Table 3
Key Indicators of Motor Coach Tourists in 2014

	Main Season ^{a)}	Other Season ^{b)}	Total
Estimated Motor Coach Travel Parties and Tourists			
Total Number of Overnight Stays by Motor Coach Tourists ^{c)}	10,573	11,152	21,725
(% of Overnight Stays)	(48.7%)	(51.3%)	(100.0%)
Average Number of Nights Stayed in PEI ^{d)}	2.20	1.80	1.98
Average Party Size ^{d)}	2.03	1.82	1.91
Estimated Total Number of Motor Coach Travel Parties ^{d)}	4,802	6,189	10,991
(% of Motor Coach Travel Parties)	(43.7%)	(56.3%)	(100.0%)
Estimated Total Number of Motor Coach Tourists ^{d)}	9,747	11,255	21,002
(% of Motor Coach Tourists)	(46.4%)	(53.6%)	(100.0%)
Estimated Expenditures ^{d)}			
Average Spending per Person per Night (excluding tour package) *	\$41.18	\$53.25	\$47.36
Average Spending per Party per Visit (excluding tour package) *	\$183.95	\$174.79	\$178.66
Estimated Total Direct Expenditures (excluding tour package) *	\$883,716	\$1,079,882	\$1,963,599
Average Spending per Person per Night (including tour package) **	\$176.85	\$177.86	\$178.32
Average Spending per Party per Visit (including tour package) **	\$790.06	\$583.89	\$673.54
Estimated Total Direct Expenditures (including tour package) **	\$3,795,606	\$3,607,279	\$7,402,885

Note: ^{a)} The main season indicates July and August.

^{b)} The rest of the year (other season) is the remaining months of the year that motor coach visitors travel to PEI.

^{c)} Actual data provided by the PEI Department of Economic Development and Tourism (Tourism PEI's Occupancy Reporting System).

^{d)} Estimates were based on the results of the 2014 Prince Edward Island survey of motor coach tourists.

* Motor coach packages typically include the cost of transportation, accommodations, most meals, and admission fees to certain attractions and events. Consequently, the estimate for direct expenditures excludes spending on these items, typically called expenses of pre-paid motor coach package tour; ** The expenditures including the portion of total tour package expenses in PEI were estimated by the survey data (see details in Table 4). These are usually paid to the tour operator/company and then are paid to the individual local tourism operators such as accommodation, restaurants, etc.

4.2. Estimated Total Direct Expenditures

- Total direct expenditures in PEI by motor coach tourists were over \$7.4 million.
- Motor coach tour packages typically include the cost of transportation, accommodations, most meals, and admission fees to attractions or other activities. The amount of expenditures in PEI related to the tour package components totalled over \$5.4 million, or 73.5 percent of total direct expenditures in PEI.
- Expenditures by motor coach tourists, aside from those spent on the tour package, totalled close to \$2.0 million. The items that accounted for the greatest proportion of this spending were shopping, and restaurants and bars.
- On average, motor coach tourists spent \$178.32 per person per night and \$673.54 per party per night, including tour package expenditures.
- Though there were fewer motor coach tourists in the main season of July and August, total direct expenditures by this group were higher than total expenditures by motor coach visitors who visited in the other months of the year (\$3.8 million versus \$3.6 million). This is mostly due to the larger party size and longer stays of main season travellers as per person per night spending was similar between the two groups (\$176.85 versus \$177.86).

Table 4
Estimated Total Direct Expenditures by Motor Coach Tourists to PEI

	Main Season		Other Season		Total	
Number of Individual Tourists (%)	9,747	(46.4%)	11,255	(53.6%)	21,002	(100.0%)
Number of Travel Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Total Direct Expenditures	\$3,795,606	(51.3%)	\$3,607,279	(48.7%)	\$7,402,885	(100.0%)
Tour Package in PEI	\$2,911,889	76.7%	\$2,527,397	70.1%	\$5,439,286	73.5%
Accommodation	\$8,415	0.2%	\$0	0.0%	\$8,415	0.1%
Restaurants and Bars	\$220,359	5.8%	\$297,112	8.2%	\$517,471	7.0%
Food and Beverage at Stores	\$47,543	1.3%	\$68,626	1.9%	\$116,169	1.6%
Car Rentals and Local Transportation	\$1,963	0.1%	\$2,988	0.1%	\$4,951	0.1%
Shopping	\$496,676	13.1%	\$607,969	16.9%	\$1,104,645	14.9%
Recreation and Entertainment	\$65,564	1.7%	\$59,861	1.7%	\$125,425	1.7%
Other Expenses	\$43,195	1.1%	\$43,327	1.2%	\$86,522	1.2%
Average Spending per Person per Night	\$176.85	100.0%	\$177.86	100.0%	\$178.32	100.0%
Tour Package in PEI	\$135.68	76.7%	\$124.62	70.1%	\$131.02	73.5%
Accommodation	\$0.39	0.2%	\$0.00	0.0%	\$0.20	0.1%
Restaurants and Bars	\$10.27	5.8%	\$14.65	8.2%	\$12.46	7.0%
Food and Beverage at Stores	\$2.22	1.3%	\$3.38	1.9%	\$2.80	1.6%
Car Rentals and Local Transportation	\$0.09	0.1%	\$0.15	0.1%	\$0.12	0.1%
Shopping	\$23.14	13.1%	\$29.98	16.9%	\$26.61	14.9%
Recreation and Entertainment	\$3.05	1.7%	\$2.95	1.7%	\$3.02	1.7%
Other Expenses	\$2.01	1.1%	\$2.14	1.2%	\$2.08	1.2%
Average Spending per Party per Visit	\$790.06	100.0%	\$583.89	100.0%	\$673.54	100.0%
Tour Package in PEI	\$606.11	76.7%	\$409.10	70.1%	\$494.89	73.5%
Accommodation	\$1.75	0.2%	\$0.00	0.0%	\$0.77	0.1%
Restaurants and Bars	\$45.87	5.8%	\$48.09	8.2%	\$47.08	7.0%
Food and Beverage at Stores	\$9.90	1.3%	\$11.11	1.9%	\$10.57	1.6%
Car Rentals and Local Transportation	\$0.41	0.1%	\$0.48	0.1%	\$0.45	0.1%
Shopping	\$103.38	13.1%	\$98.41	16.9%	\$100.50	14.9%
Recreation and Entertainment	\$13.65	1.7%	\$9.69	1.7%	\$11.41	1.7%
Other Expenses	\$8.99	1.1%	\$7.01	1.2%	\$7.87	1.2%
Average Number of Nights Stayed in PEI	2.20		1.80		1.98	
Average Party Size	2.03		1.82		1.91	

Note: Total direct expenditures were calculated as follows: average spending per person per night (\$178.32) × number of motor coach tourists (21,002) × average number of nights stayed (1.98) ≈ \$7,402,885 or average spending per party per visit (\$673.54) × number of motor coach travel parties (10,991) ≈ \$7,402,885.

5. A Profile of Motor Coach Tourists

5.1. Origin of Travel Parties

- Over three-quarters (76.2%) of motor coach parties were from the United States while 11.8 percent were from Canada and 12.0 percent were from another country.
- Twenty-six percent of motor coach parties were from the South Atlantic United States, 13.7 percent were from the East North Central United States and 8.5 percent were from the Middle Atlantic United States.
- The majority of those from Canada were from Ontario, representing 6.9 percent of total motor coach parties.
- In the main season, 67.3 percent of motor coach parties were from the United States compared to 83.2 percent of those who travelled during the other seasons.
- Canadians comprised a small portion (3.0%) of motor coach tourists outside of the main season but accounted for 23.1 percent of motor coach parties who visited during the main season.

Table 5
Origin of Motor Coach Travel Parties by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Canada	1,108	23.1%	184	3.0%	1,292	11.8%
Ontario	693	14.4%	61	1.0%	754	6.9%
Manitoba & Saskatchewan	46	1.0%	61	1.0%	107	1.0%
Alberta & British Columbia	323	6.7%	61	1.0%	384	3.5%
Rest of Canada	46	1.0%	0	0.0%	46	0.4%
United States	3,232	67.3%	5,147	83.2%	8,379	76.2%
New England ^{a)}	139	2.9%	245	4.0%	384	3.5%
Middle Atlantic ^{b)}	323	6.7%	613	9.9%	936	8.5%
South Atlantic ^{c)}	923	19.2%	1,961	31.7%	2,884	26.2%
East North Central ^{d)}	831	17.3%	674	10.9%	1,505	13.7%
West North Central ^{e)}	139	2.9%	551	8.9%	690	6.3%
East South Central ^{f)}	139	2.9%	0	0.0%	139	1.3%
West South Central ^{g)}	231	4.8%	245	4.0%	476	4.3%
Mountain ^{h)}	139	2.9%	429	6.9%	568	5.2%
Pacific, Alaska & Hawaii ⁱ⁾	369	7.7%	429	6.9%	798	7.3%
Other Country	462	9.6%	858	13.9%	1,320	12.0%

Note: The data was not weighted by origin information of actual motor coach tourists or parties so the results may not reflect the actual origin of motor coach tourists. The US regions include the following states:

^{a)} New England: Maine, New Hampshire, Vermont, Massachusetts, Connecticut, Rhode Island

^{b)} Middle Atlantic: New York, Pennsylvania, New Jersey

^{c)} South Atlantic: Maryland, Delaware, District of Columbia/Washington D.C., West Virginia, Virginia, North Carolina, South Carolina, Georgia, Florida

^{d)} East North Central: Wisconsin, Michigan, Illinois, Indiana, Ohio

^{e)} West North Central: North Dakota, South Dakota, Minnesota, Iowa, Nebraska, Kansas, Missouri

^{f)} East South Central: Kentucky, Tennessee, Mississippi, Alabama

^{g)} West South Central: Oklahoma, Arkansas, Texas, Louisiana

^{h)} Mountain: Montana, Idaho, Wyoming, Nevada, Utah, Colorado, New Mexico, Arizona

ⁱ⁾ Pacific, Alaska & Hawaii: Washington, Oregon, California, Alaska, Hawaii

5.2. Party and Age Composition and Average Party Size

- On average, motor coach parties were comprised of 1.91 people. Parties who visited during the main season were slightly larger than those who visited in the other seasons (2.03 people versus 1.82 people).
- Seventy-seven percent of parties were comprised of two adults, while 18.2 percent of parties consisted of one adult and 4.8 percent consisted of three or more adults.
- A large proportion (83.0%) of parties were comprised of adults aged 55 and over. About 10 percent of parties were comprised of travellers of various age generations while 6.4 percent were comprised of adults between the ages of 35 and 54. Less than one percent of parties were comprised of adults between the ages of 18 and 34.
- The age composition of parties was similar by season.

Table 6
Party and Age Composition and Average Party Size by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Party Composition						
Adult travelling alone	831	17.3%	1,164	18.8%	1,995	18.2%
2 adults	3,509	73.1%	4,963	80.2%	8,472	77.1%
3 or more adults	462	9.6%	61	1.0%	523	4.8%
Age Composition						
Millennial (18 to 34) Travellers	46	1.0%	0	0.0%	46	0.4%
Middle Aged (35 to 54) Travellers	277	5.8%	429	6.9%	706	6.4%
Senior (55 and over) Travellers	3,971	82.7%	5,147	83.2%	9,118	83.0%
Multi-generation Travellers	508	10.6%	613	9.9%	1,121	10.2%
Party Size						
Average Party Size (All Adults)	2.03		1.82		1.91	
Avg. Number of Male Passengers	0.68		0.66		0.67	
Avg. Number of Female Passengers	1.35		1.16		1.24	

Note: Families as one of the travel party composition types and the average number of children in the party are not available because the surveys did not capture motor coach travel parties who had a child(ren) in the sampling process.

5.3. Gender and Age of Motor Coach Tourists

- Close to two-thirds (64.9%) of motor coach tourists were female.
- One-half of motor coach tourists were between the ages of 65 and 74, 23.6 percent were between the ages of 55 and 64, and 14.3 percent were aged 75 and over.
- About 12 percent of motor coach tourists were under the age of 55.
- A greater proportion of motor coach tourists who visited in the main season were aged 75 and over compared to the other seasons (19.4% versus 9.8%). This was offset by a greater proportion of motor coach tourists aged 55 to 64 in the other seasons versus the main season (27.2% versus 19.4%).

Table 7
Gender and Age of Individual Motor Coach Tourists by Season

	Main Season		Other Season		Total	
Number of Individual Tourists (%)	9,747	(46.4%)	11,255	(53.6%)	21,002	(100.0%)
Gender						
Male	3,280	33.7%	4,098	36.4%	7,378	35.1%
Female	6,467	66.3%	7,157	63.6%	13,624	64.9%
Age						
Under 8 Years	n/a	n/a	n/a	n/a	n/a	n/a
9 – 17 Years	n/a	n/a	n/a	n/a	n/a	n/a
18 – 24 Years	n/a	n/a	61	0.5%	61	0.3%
25 – 34 Years	323	3.3%	61	0.5%	384	1.8%
35 – 44 Years	139	1.4%	184	1.6%	323	1.5%
45 – 54 Years	830	8.5%	917	8.1%	1,747	8.3%
55 – 64 Years	1,893	19.4%	3,059	27.2%	4,952	23.6%
65 – 74 Years	4,668	47.9%	5,873	52.2%	10,541	50.2%
75 Years and over	1,894	19.4%	1,100	9.8%	2,994	14.3%

Note: n/a indicates that the number of children (aged 17 and under) and those aged 18-24 years during the main season are not available because the surveys did not capture motor coach tourists in these age groups in the sampling process.

5.4. Average Length of Stay and PEI Regions Visited During the Trip

- Motor coach parties stayed an average of 1.98 nights in PEI in 2014.
- Nearly all (98.5%) parties visited the Points East Coastal Drive region during their time in PEI and 90.2 percent visited the Greater Charlottetown Area.
- Other regions of PEI were visited by a much smaller percentage of parties. About one-quarter visited the Red Sands Shore region, while 19.0 percent visited the Green Gables Shore region and about 10 percent visited each of Summerside and the North Cape Coastal Drive region.
- Note that a “visit” was defined as staying overnight, dining, visiting an attraction, or participating in an activity in the region, and not travelling through the region only.

Table 8
Average Length of Stay in PEI and PEI Regions Visited During the Trip by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Average Length of Stay in PEI	2.20		1.80		1.98	
PEI Regions Visited *						
Greater Charlottetown Area	4,340	90.4%	5,576	90.1%	9,916	90.2%
Green Gables Shore	923	19.2%	1,164	18.8%	2,087	19.0%
Summerside	554	11.5%	613	9.9%	1,167	10.6%
Points East Coastal Drive	4,756	99.0%	6,066	98.0%	10,822	98.5%
Red Sands Shore	1,385	28.8%	1,348	21.8%	2,733	24.9%
North Cape Coastal Drive	462	9.6%	551	8.9%	1,013	9.2%

Note: * Results were based on multiple responses.

5.5. Type of Visitation, Last Trip to PEI, and Average Number of Times Visited PEI

- Close to all (94.1%) motor coach parties were visiting PEI for the first time.
- The majority of those who had visited PEI previously had not visited recently and they had not visited PEI often.
- Over three-quarters of repeat visitors had last visited PEI in 2009 or earlier.
- On average, repeat visitors had visited PEI 0.91 times in the past five years.

Table 9
Type of Visitation and Last Trip to PEI by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Type of Visitation						
First-Time Visitors	4,340	90.4%	6,005	97.0%	10,345	94.1%
Repeat Visitors	462	9.6%	184	3.0%	646	5.9%
Last Trip to PEI *						
This year (2014)	0	0.0%	0	0.0%	0	0.0%
One year ago (2013)	46	10.0%	0	0.0%	46	7.1%
Two years ago (2012)	46	10.0%	0	0.0%	46	7.1%
Three years ago (2011)	0	0.0%	0	0.0%	0	0.0%
Four years ago (2010)	0	0.0%	61	33.2%	61	9.5%
Five or more years ago (2009 & earlier)	369	80.0%	123	66.8%	492	76.3%
Average Number of Times Visited PEI in the Past Five Years*						
Mean (Group Median)	1.00 (0.75)		0.67 (0.67)		0.91 (0.72)	

Note: * Repeat visitors only.

5.6. Primary Feature That Attracted Motor Coach Tourists to PEI

- About one-half of motor coach parties indicated that the primary reason they booked a bus tour that included a visit to PEI was the natural beauty and pastoral settings of the province.
- Twenty-two percent of motor coach parties were attracted by Anne of Green Gables and Lucy Maud Montgomery.
- Thirteen percent indicated they were attracted by “other” features. The responses specified in this category were mostly statements about PEI being part of the tour they had purchased.

Table 10
Primary Feature That Attracted Motor Coach Tourists to PEI by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Natural beauty and pastoral settings	2,262	47.1%	3,125	50.5%	5,387	49.0%
World of Anne of Green Gables and Lucy Maud Montgomery	923	19.2%	1,471	23.8%	2,394	21.8%
Beaches and coastline	277	5.8%	551	8.9%	828	7.5%
Culinary experiences (lobster, seafood, wine, farm products, etc.)	416	8.7%	245	4.0%	661	6.0%
Birthplace of Confederation attractions	185	3.9%	0	0.0%	185	1.7%
Outdoor activities (water-based activities, skiing, Confederation trail, cycling, bird watching, etc.)	0	0.0%	61	1.0%	61	0.6%
Festivals and events	46	1.0%	0	0.0%	46	0.4%
Other features	693	14.4%	735	11.9%	1,428	13.0%

5.7. Activities Participated in While in PEI

- The two most popular activities among motor coach tourists were visiting Anne of Green Gables attractions (97.1% of parties participated in this activity) and sightseeing and/or taking a driving tour (95.0%).
- Other popular activities related to nature, and culinary and cultural activities, and included sampling local culinary products (83.1%), visiting historical and cultural attractions (82.7%), shopping for local crafts, souvenirs, antiques (80.9%), visiting a national or provincial park (73.6%), visiting Birthplace of Confederation attractions (55.9%) and going to a beach (54.8%).

Table 11
Activities Participated in While in PEI by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Visiting Anne of Green Gables attractions	4,663	97.1%	6,005	97.0%	10,668	97.1%
Sightseeing/driving tour	4,617	96.1%	5,821	94.1%	10,438	95.0%
Sampling local culinary products (lobster, potatoes, mussels, oysters, wine, beer, etc.)	4,109	85.6%	5,025	81.2%	9,134	83.1%
Visiting historical and cultural attractions	4,248	88.5%	4,841	78.2%	9,089	82.7%
Shopping for local crafts/souvenirs/antiques	3,740	77.9%	5,147	83.2%	8,887	80.9%
Visiting a national or provincial park	3,925	81.7%	4,167	67.3%	8,092	73.6%
Visiting Birthplace of Confederation attractions (e.g., Founders' Hall, Province House)	2,770	57.7%	3,370	54.5%	6,140	55.9%
Going to a beach	2,955	61.5%	3,064	49.5%	6,019	54.8%
Attending a performance (live theatre, play)	2,262	47.1%	613	9.9%	2,875	26.2%
Attending a festival, event, or concert	1,293	26.9%	735	11.9%	2,028	18.5%
Taking part in an authentic PEI experience/hands-on learning activity (lobster fishing, clam digging, pottery, etc.)	277	5.8%	368	5.9%	645	5.9%
Using the Confederation Trail (cycling, walking, running, etc.)	92	1.9%	245	4.0%	337	3.1%
Participating in water activities (kayaking, tuna fishing, etc.)	139	2.9%	123	2.0%	262	2.4%
Visiting a theme, fun or amusement park	92	1.9%	0	0.0%	92	0.8%
Visiting friends and/or relatives	0	0.0%	61	1.0%	61	0.6%
Attending a sports event or tournament (as a spectator)	0	0.0%	61	1.0%	61	0.6%
Playing golf (not miniature)	0	0.0%	0	0.0%	0	0.0%
Other	323	6.7%	123	2.0%	446	4.1%

Note: Results were based on multiple responses.

5.8. Average Spending on Pre-paid Tour Package

- On average, motor coach parties spent \$1,667.89 per person for the motor coach tour package.
- Assuming that a 30 percent margin on the cost of the tour package was retained by the tour company, \$1,167.52 per person was spent at the destinations on the tour.
- The tours included an average of 9.01 nights meaning that the cost of the tour package was about \$129.58 per person per night, assuming the cost was equal for all destinations on the motor coach tour.
- Applying this to the number of nights the motor coach parties spent in PEI, average spending per person per visit that resulted from the tour package was \$256.14.
- Average spending per party per visit that resulted from the tour package was \$494.89.

Table 12
Average Spending on Pre-paid Tour Package by Season

	Main Season	Other Season	Total
Number of Parties (%)	4,802 (43.7%)	6,189 (56.3%)	10,991 (100.0%)
Average Spending on Pre-paid Tour Package per Person	\$1,756.03	\$1,596.88	\$1,667.89
Average Spending on Pre-paid Tour Package per Person at Destinations *	\$1,229.22	\$1,117.82	\$1,167.52
Average Number of Nights included in Pre-paid Tour Package	9.06	8.97	9.01
Average Spending per Person per Night in PEI by Pre-paid Tour Package **	\$135.68	\$124.62	\$129.58
Average Number of Nights Stayed in PEI	2.20	1.80	1.98
Average Spending per Person per Visit in PEI by Pre-paid Tour Package	\$298.75	\$224.56	\$256.14
Average Party Size	2.03	1.82	1.91
Average Spending per Party per Night in PEI by Pre-paid Tour Package	\$275.26	\$227.03	\$247.79
Average Spending per Party per Visit in PEI by Pre-paid Tour Package	\$606.11	\$409.10	\$494.89

Note: * Results are based on a deduction for tour operators' margin on tour package prices. The estimates were calculated by applying a 30% margin to pre-paid tour package prices; this was selected based on the general rule of thumb for markups on tour packages and the researcher's estimate of a reasonable value. ** This assumes that per night spending is equal for all destinations on the tour, though this may not be the case for all tours.

5.9. Evaluation of the Trip and Future Behavioural Intentions

- Motor coach parties were pleased with various aspects of their trip to PEI. The quality of attractions/events and the quality of customer service received the highest ratings though accommodation and restaurant service and quality, and variety of things to see and do were also rated highly. All of these items were rated at 4.4 or higher on a five-point scale from 1 (very poor) to 5 (excellent).
- The prices of goods and services were rated lower at 3.81. Despite this, 91.9 percent of parties agreed that their trip to PEI was good value for the money spent.
- Ninety-five percent of parties agreed that their time spent in PEI was excellent and about 91 percent agreed that there were suitable activities offered during the visit to PEI, and that they were satisfied with their time in PEI.
- Eighty-five percent of parties indicated that the inclusion of PEI in the itinerary was an important reason for selecting the coach tour. About three-quarters of parties agreed that sufficient time was provided for the visit to PEI.
- Nearly all (97.0%) parties indicated they would recommend PEI as a travel destination to others and 83.6 percent indicated they would visit PEI again.

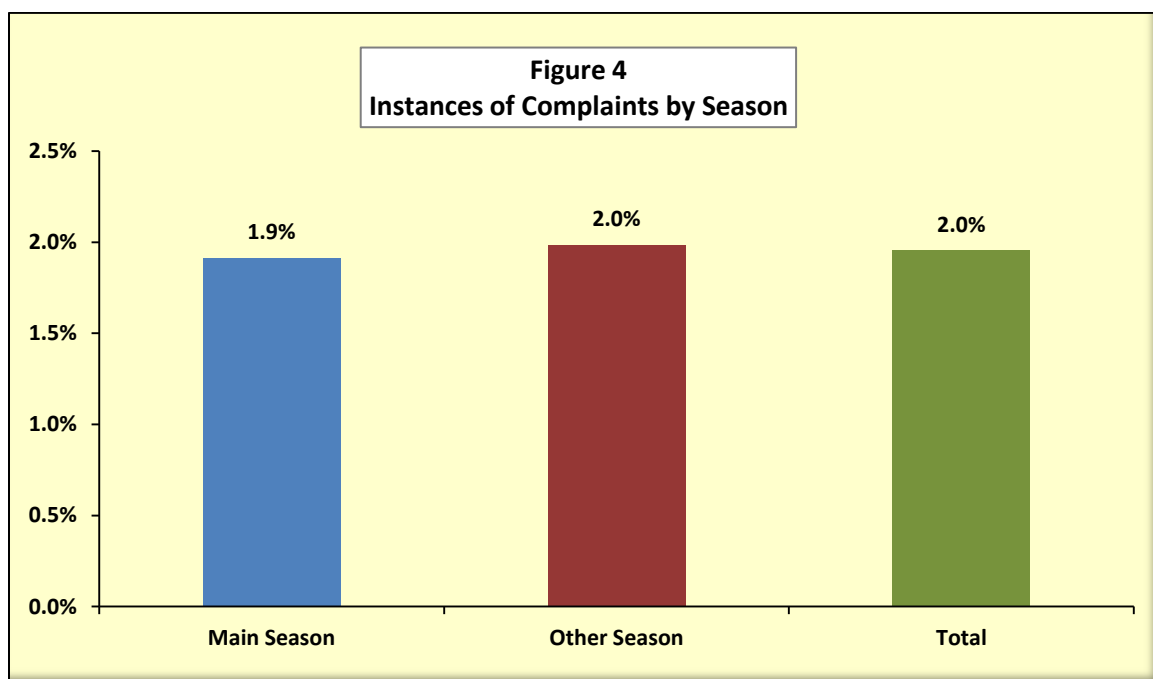
Table 13
Evaluation of the Trip and Future Behavioural Intentions by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Rating of Aspects of the Trip to PEI *	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}
Accommodation service and quality	82.5%	4.32	89.2%	4.47	86.2%	4.40
Restaurant service and quality (excluding fast food)	87.3%	4.30	93.5%	4.51	90.7%	4.41
Quality of attractions and/or events	96.6%	4.58	97.5%	4.68	97.1%	4.64
Quality of customer service	90.2%	4.50	97.8%	4.71	94.3%	4.61
Prices of goods and services	64.6%	3.79	66.3%	3.84	65.6%	3.81
Variety of things to see and do	92.1%	4.46	92.2%	4.46	92.2%	4.46
Evaluation of the Trip and Satisfaction **	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}
The inclusion of PEI in the itinerary was an important reason for selecting this coach tour	81.4%	4.39	87.8%	4.43	85.0%	4.41
On the tour, sufficient time was provided for the visit to PEI	67.6%	3.71	79.4%	4.00	74.2%	3.87
There were suitable activities offered during the visit to PEI	96.1%	4.43	87.6%	4.27	91.4%	4.34
My trip to PEI was good value for money spent	92.1%	4.43	91.8%	4.41	91.9%	4.42
My time spent in PEI was excellent	96.0%	4.62	95.0%	4.51	95.4%	4.56
I was satisfied with my time in PEI	91.2%	4.52	89.9%	4.37	90.5%	4.44
Behavioural Intentions **	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}	% ^{a)}	M ^{b)}
I would recommend PEI as a travel destination to others	97.0%	4.69	97.0%	4.64	97.0%	4.66
I would visit PEI again	84.2%	4.39	83.1%	4.38	83.6%	4.39

Note: ^{a)} Percentages (%) indicate the percentage of respondents who rated the statement 4 or 5; ^{b)} Mean values (M) were based on a 5-point Likert-type scale (* 1=very poor; 5=excellent; ** 1=strongly disagree; 5=strongly agree).

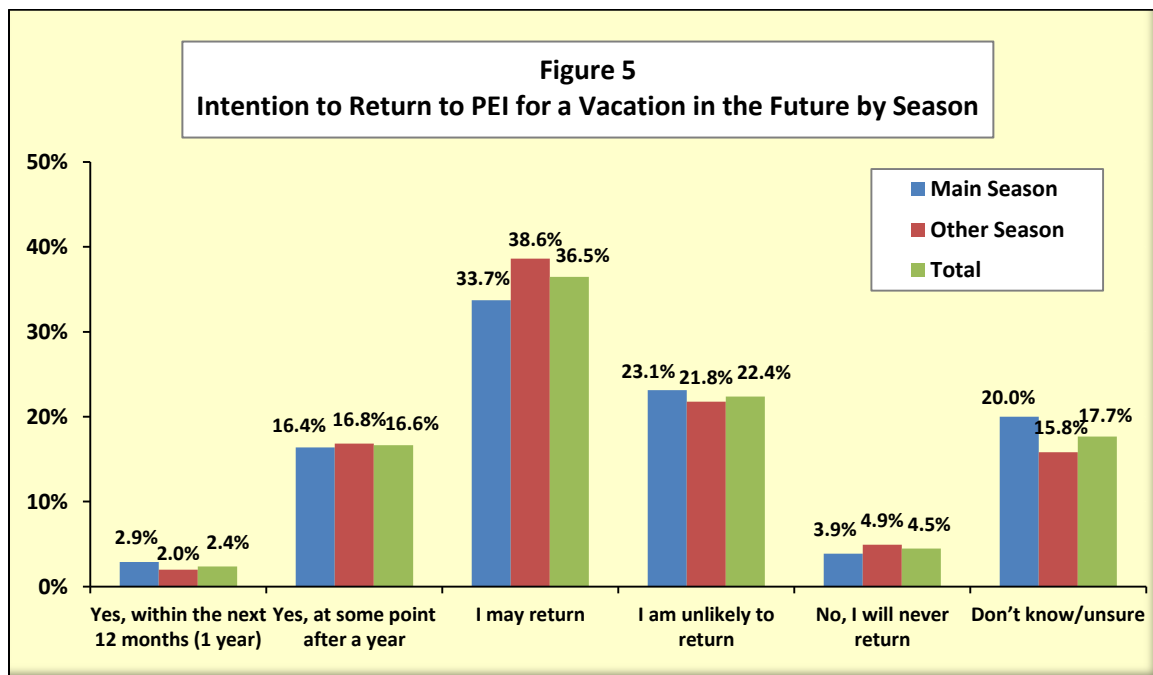
5.10. Instances of Complaints

- Only 2.0 percent of motor coach parties indicated they experienced a problem or had a complaint that would impact their decision to return to PEI, or deter them from recommending PEI as a travel destination to others.
- Respondents were given the opportunity to provide details of their problem or complaint but very few respondents chose to do so. The problems/complaints that were specified related to issues at restaurants or accommodations.



5.11. Intention to Return to PEI

- Nineteen percent of motor coach parties indicated they would return to PEI for a vacation in the future. About 37 percent indicated they may return.
- About 22 percent indicated they were unlikely to return to vacation in PEI in the future while 17.7 percent were unsure about their intentions to return and 4.5 percent indicated they will not return.



5.12. Comments

- Survey respondents were given the opportunity to provide comments about any aspect of their trip to PEI. In total, 68 respondents (33.2% of all survey respondents) provided a comment.
- The comments were reviewed and classified into various categories. About 68 percent of the comments were positive in nature and included comments about friendly people in PEI, good hospitality, beautiful scenery, enjoyment of specific places and activities, and overall enjoyment of the visit.
- An additional 10.3 percent of comments included both positive and negative feedback, or suggestions for improvement. This means that about 79 percent of respondents who provided a comment had something positive to say about their experience in PEI.
- About 12 percent of respondents provided a complaint or suggestions for improvement. The comments in this category varied but most related to components of the motor coach tour. Some respondents noted displeasure with their accommodation and/or food at the accommodation while others stated that an unacceptable amount of time was spent at the stops on the tour of PEI (either too little or too much time) or that they would have liked more time to explore PEI on their own.
- The remaining 10.3 percent of comments were miscellaneous comments that were neither positive nor negative feedback.

Table 14
Classification of Respondents' Comments

	Total Comments (N = 68)	
	N	%
Positive comments	46	67.6%
Negative comments/suggestions for improvement	8	11.8%
Mixed comments (positive and negative/suggestions for improvement)	7	10.3%
Other	7	10.3%

5.13. Demographic Characteristics of Respondents

- About 74 percent of survey respondents were female.
- One-half of survey respondents were between the ages of 65 and 74 while 25.1 percent were aged 55-64 and 10.5 percent were aged 75 and over.
- Ninety percent of respondents indicated they were currently living in the same country in which they were born. About 92 percent stated that English was their mother tongue.
- The majority (62.7%) of respondents were married or living common law.
- About 4 percent of respondents reported there was a child(ren) under the age of 18 living in their household. On average, there were 1.67 children under 18 in these households.
- About 13 percent of respondents reported there was a child(ren) aged 18 or older living in their household and these households included an average of 1.89 children aged 18 or older.
- Over three-quarters of respondents had completed some type of post-secondary education. Forty-four percent had a post graduate degree or professional designation while 20.1 percent had graduated from university and 14.4 percent had graduated from community or technical college.
- Sixty-five percent of respondents were retired, 22.2 percent were working full time and 10.9 percent were working part time or seasonally.
- About 27 percent of respondents chose not to state their annual household income. About 29 percent of respondents indicated their annual household income was less than \$60,000 while 24.0 percent indicated their annual household income was \$100,000 or more. About 20 percent of respondents reported annual household income between \$60,000 and \$99,999.

Table 15
Demographic Characteristics of Respondents by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Gender						
Male	1,293	26.9%	1,593	25.7%	2,886	26.3%
Female	3,509	73.1%	4,596	74.3%	8,105	73.7%
Age						
25 to 34	185	3.9%	61	1.0%	246	2.2%
35 to 44	92	1.9%	184	3.0%	276	2.5%
45 to 54	416	8.7%	613	9.9%	1,029	9.4%
55 to 64	923	19.2%	1,838	29.7%	2,761	25.1%
65 to 74	2,401	50.0%	3,125	50.5%	5,526	50.3%
75 and over	785	16.3%	368	5.9%	1,153	10.5%
Living in the Same Country in Which Respondents were Born						
Yes	4,386	91.3%	5,515	89.1%	9,901	90.1%
No	416	8.7%	674	10.9%	1,090	9.9%
Mother Tongue						
English	4,479	93.3%	5,576	90.1%	10,055	91.5%
French	92	1.9%	0	0.0%	92	0.8%
Other	231	4.8%	613	9.9%	844	7.7%
Marital Status						
Single	1,431	29.8%	1,777	28.7%	3,208	29.2%
Married/living common law	2,909	60.6%	3,983	64.4%	6,892	62.7%
Other	462	9.6%	429	6.9%	891	8.1%
Average Number of Children Living in the Household for All Parties						
17 years and younger	0.07		0.06		0.06	
18 years and older	0.13		0.33		0.24	
Average Number of Children Living in the Household for Those Who Have a Child(ren)						
17 years and younger (n=number of parties)	1.40 (n=231)		2.00 (n=184)		1.67 (n=415)	
18 years and older (n=number of parties)	1.75 (n=369)		1.94 (n=1,042)		1.89 (n=1,411)	

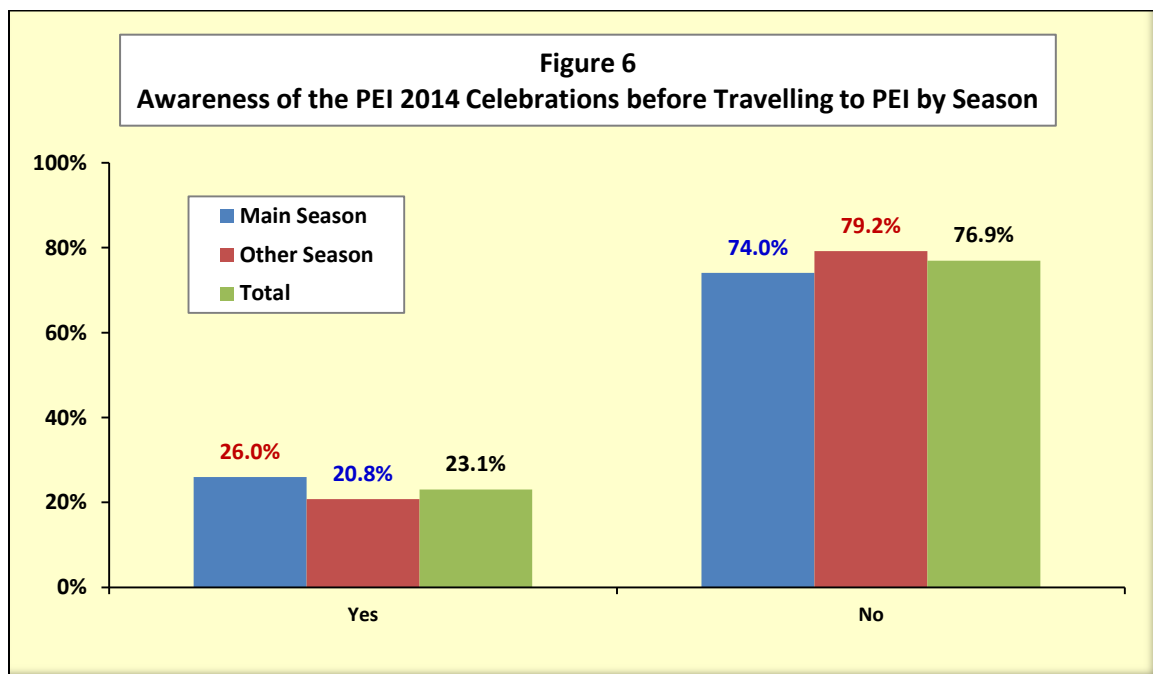
Table 15 (cont'd)
Demographic Characteristics of Respondents by Season

	Main Season		Other Season		Total	
Number of Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Education						
Some school	46	1.0%	0	0.0%	46	0.4%
High school diploma	369	7.7%	490	7.9%	859	7.8%
Some post-secondary	831	17.3%	613	9.9%	1,444	13.1%
Graduated community/technical college	600	12.5%	980	15.8%	1,580	14.4%
Graduated university (undergraduate degree)	1,108	23.1%	1,103	17.8%	2,211	20.1%
Post graduate degree/professional designation	1,847	38.5%	3,003	48.5%	4,850	44.1%
Employment Status						
Working full time	1,154	24.0%	1,287	20.8%	2,441	22.2%
Working part time or seasonally	646	13.5%	551	8.9%	1,197	10.9%
Retired	2,863	59.6%	4,289	69.3%	7,152	65.1%
Homemaker	139	2.9%	0	0.0%	139	1.3%
Other	0	0.0%	61	1.0%	61	0.6%
Annual Household Income						
Under \$40,000	462	9.6%	797	12.9%	1,259	11.5%
\$40,000 to \$59,999	785	16.3%	1,164	18.8%	1,949	17.7%
\$60,000 to \$79,999	416	8.7%	368	5.9%	784	7.1%
\$80,000 to \$99,999	646	13.5%	797	12.9%	1,443	13.1%
\$100,000 to \$124,999	646	13.5%	551	8.9%	1,197	10.9%
\$125,000 to \$149,999	139	2.9%	551	8.9%	690	6.3%
\$150,000 to \$174,999	139	2.9%	61	1.0%	200	1.8%
\$175,000 to \$199,999	92	1.9%	0	0.0%	92	0.8%
\$200,000 or more	277	5.8%	184	3.0%	461	4.2%
Not Stated	1,200	25.0%	1,716	27.7%	2,916	26.5%

6. Impact of the PEI 2014 Celebrations on Motor Coach Tourists' Direct Spending in PEI

6.1. Awareness of the PEI 2014 Celebrations Before Travelling to PEI

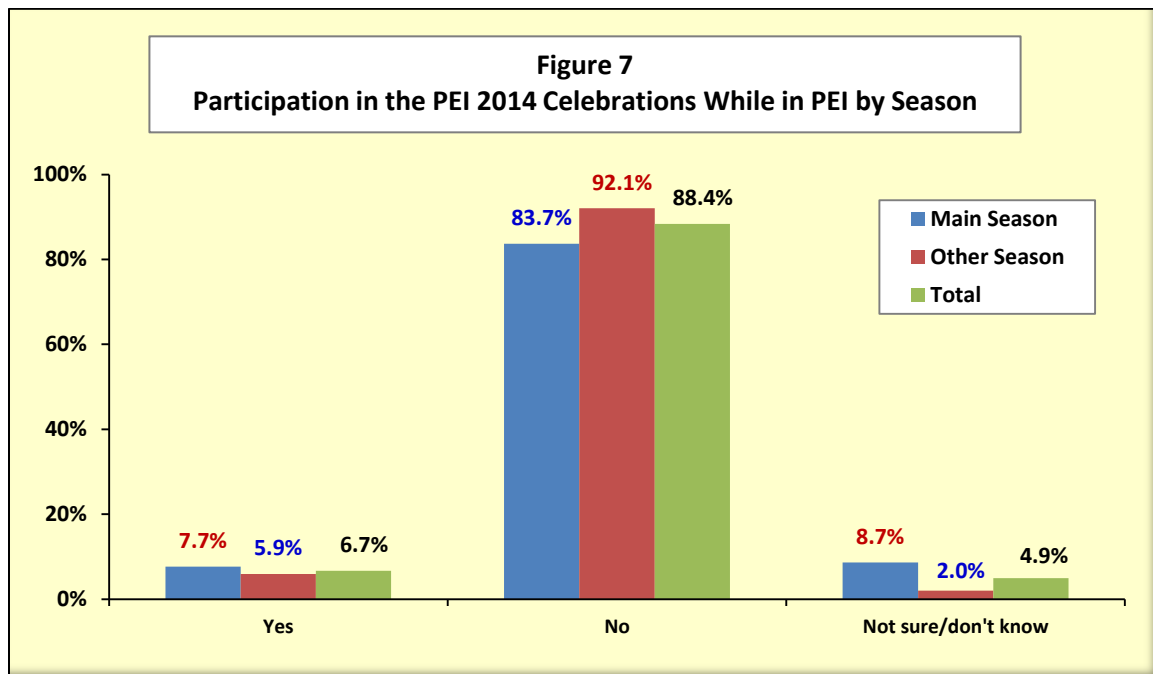
- The year 2014 marked the 150th anniversary of the 1864 Charlottetown Conference, where the idea of Canadian Confederation was first discussed. To celebrate and commemorate the anniversary of this historic event, many activities and events were held across PEI in 2014 (referred to as "PEI 2014 celebrations").
- Overall, 23.1 percent of motor coach parties were aware of the PEI 2014 celebrations before they travelled to PEI.
- Twenty-six percent of those who visited PEI during the main season were aware of the celebrations compared to 20.8 percent of those who visited in the other seasons.



Note: While **red-bold numbers** indicate a result that is *significantly higher than* the other group, **blue-bold numbers** indicate a result that is *significantly lower than* the other group.

6.2. Participation in the PEI 2014 Celebrations While in PEI

- About 7 percent of motor coach parties participated in a PEI 2014-related event while visiting PEI. Many of these parties indicated that the PEI 2014 event they had attended was the production of *Canada Rocks* at the Confederation Centre of the Arts in Charlottetown.



Note: While **red-bold numbers** indicate a result that is *significantly higher than* the other group, **blue-bold numbers** indicate a result that is *significantly lower than* the other group.

6.3. Influence of the PEI 2014 Celebrations on the Decision to Travel to PEI

- The PEI 2014 celebrations did not have any influence on motor coach parties' decision to visit PEI.

Table 16
Influence of the PEI 2014 Celebrations/Events on the Decision to Travel to PEI by Season*

	Main Season		Other Season		Total	
Those Who Were Aware of the PEI 2014 Celebrations before Travelling to PEI <i>and</i> Attended the Celebrations						
Number of Tourist Parties (%)	139	(53.1%)	123	(46.9%)	261	(100.0%)
Percent of Influence ¹⁾	0.0%		0.0%		0.0%	
All Motor Coach Travel Parties Regardless of Awareness and Attendance of the PEI 2014 Celebrations/Events						
Number of Tourist Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Percent of Influence ²⁾	0.0%		0.0%		0.0%	

Note: While ¹⁾ percent of influence of the PEI 2014 celebrations/event(s) on the decision to travel to PEI was based on the number of passenger travel parties who were aware of the PEI 2014 celebrations/event(s) before travelling to PEI and attended an event, ²⁾ percent of influence was based on all motor coach travel parties regardless of their awareness and attendance of the PEI 2014 celebrations/event(s).

6.4. Motor Coach Tourists' Direct Expenditures that Resulted from the PEI 2014 Celebrations

- Direct expenditures that resulted from motor coach parties' attendance of PEI 2014 events totalled \$38,046.
- This included spending on food and beverage at PEI 2014 events of \$20,092 and shopping expenditures at PEI 2014 events of \$17,954.
- On average, motor coach parties spent \$0.92 per person per night at PEI 2014 events. This includes all motor coach parties, even those who did not attend a PEI 2014 event.

Table 17
Estimated Direct Spending by Motor Coach Tourists that Resulted from the PEI 2014 Celebrations

	Main Season		Other Season		Total	
Number of Individual Tourists (%)	9,747	(46.4%)	11,255	(53.6%)	21,002	(100.0%)
Number of Travel Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Direct Expenditures that Resulted from the PEI 2014 Celebrations	\$20,616	(54.2%)	\$17,430	(45.8%)	\$38,046	(100.0%)
Food and beverage at PEI 2014 event(s)	\$12,622	61.2%	\$7,470	42.9%	\$20,092	52.8%
Shopping at PEI 2014 event(s)	\$7,994	38.8%	\$9,960	57.1%	\$17,954	47.2%
Tour package (travel package)	\$0	0.0%	\$0	0.0%	\$0	0.0%
Accommodations	\$0	0.0%	\$0	0.0%	\$0	0.0%
Food and beverage at restaurants, bars, etc.	\$0	0.0%	\$0	0.0%	\$0	0.0%
Food and beverage at stores	\$0	0.0%	\$0	0.0%	\$0	0.0%
Vehicle operation	n/a	n/a	n/a	n/a	n/a	n/a
Car rentals in PEI and local transportation	\$0	0.0%	\$0	0.0%	\$0	0.0%
Shopping	\$0	0.0%	\$0	0.0%	\$0	0.0%
Recreation and entertainment	\$0	0.0%	\$0	0.0%	\$0	0.0%
Other expenditures	\$0	0.0%	\$0	0.0%	\$0	0.0%
Average Spending per Person per Night	\$0.96	100.0%	\$0.86	100.0%	\$0.92	100.0%
Food and beverage at PEI 2014 event(s)	\$0.59	61.2%	\$0.37	42.9%	\$0.48	52.8%
Shopping at PEI 2014 event(s)	\$0.37	38.8%	\$0.49	57.1%	\$0.43	47.2%
Tour package (travel package)	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Accommodations	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Food and beverage at restaurants, bars, etc.	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Food and beverage at stores	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Vehicle operation	n/a	n/a	n/a	n/a	n/a	n/a
Car rentals in PEI and local transportation	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Shopping	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Recreation and entertainment	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Other expenditures	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%

Note: Total direct expenditures that resulted from the PEI 2014 celebrations were calculated as follows: average spending per person per night (\$0.92) × number of motor coach tourists (21,002) × average number of nights stayed (1.98) ≈ \$38,046.

6.5. Motor Coach Tourists' Total Direct Expenditures for Their Entire PEI Trip in 2014

- As shown previously, total direct expenditures by motor coach parties who visited PEI in 2014 totalled over \$7.4 million. This includes spending at PEI 2014 events and other spending.

Table 18
Estimated Total Direct Spending by Motor Coach Tourists for Their Entire PEI Trip*

	Main Season		Other Season		Total	
Number of Individual Tourists (%)	9,747	(46.4%)	11,255	(53.6%)	21,002	(100.0%)
Number of Travel Parties (%)	4,802	(43.7%)	6,189	(56.3%)	10,991	(100.0%)
Total Direct Expenditures in PEI	\$3,795,606	(51.3%)	\$3,607,279	(48.7%)	\$7,402,885	(100.0%)
Food and beverage at PEI 2014 event(s)	\$12,622	0.3%	\$7,470	0.2%	\$20,092	0.3%
Shopping at PEI 2014 event(s)	\$7,994	0.2%	\$9,960	0.3%	\$17,954	0.2%
Tour package (travel package)	\$2,911,889	76.7%	\$2,527,397	70.1%	\$5,439,286	73.5%
Accommodations	\$8,415	0.2%	\$0	0.0%	\$8,415	0.1%
Food and beverage at restaurants, bars, etc.	\$207,737	5.5%	\$289,642	8.0%	\$497,379	6.7%
Food and beverage at stores	\$47,543	1.3%	\$68,626	1.9%	\$116,169	1.6%
Vehicle operation	n/a	n/a	n/a	n/a	n/a	n/a
Car rentals in PEI and local transportation	\$1,963	0.1%	\$2,988	0.1%	\$4,951	0.1%
Shopping	\$488,682	12.9%	\$598,009	16.6%	\$1,086,691	14.7%
Recreation and entertainment	\$65,564	1.7%	\$59,861	1.7%	\$125,425	1.7%
Other expenditures	\$43,195	1.1%	\$43,327	1.2%	\$86,522	1.2%
Average Spending per Person per Night	\$176.85	100.0%	\$177.86	100.0%	\$178.32	100.0%
Food and beverage at PEI 2014 event(s)	\$0.59	0.3%	\$0.37	0.2%	\$0.48	0.3%
Shopping at PEI 2014 event(s)	\$0.37	0.2%	\$0.49	0.3%	\$0.43	0.2%
Tour package (travel package)	\$135.68	76.7%	\$124.62	70.1%	\$131.02	73.5%
Accommodations	\$0.39	0.2%	\$0.00	0.0%	\$0.20	0.1%
Food and beverage at restaurants, bars, etc.	\$9.68	5.5%	\$14.28	8.0%	\$11.98	6.7%
Food and beverage at stores	\$2.22	1.3%	\$3.38	1.9%	\$2.80	1.6%
Vehicle operation	n/a	n/a	n/a	n/a	n/a	n/a
Car rentals in PEI and local transportation	\$0.09	0.1%	\$0.15	0.1%	\$0.12	0.1%
Shopping	\$22.77	12.9%	\$29.49	16.6%	\$26.18	14.7%
Recreation and entertainment	\$3.05	1.7%	\$2.95	1.7%	\$3.02	1.7%
Other expenditures	\$2.01	1.1%	\$2.14	1.2%	\$2.08	1.2%

Note: Total direct expenditures were calculated as follows: average spending per person per night (\$178.32) × number of motor coach tourists (21,002) × average number of nights stayed (1.98) ≈ \$7,402,885.

6.6. Impact of the PEI 2014 Celebrations on Motor Coach Tourists' Direct Expenditures

- Although the PEI 2014 celebrations did not have any influence on motor coach parties' decision to visit PEI, the celebrations accounted for 0.5 percent of motor coach parties' direct expenditures in PEI.
- Spending on food and beverage at PEI 2014 events accounted for 3.9 percent of all spending on food and beverage at restaurants, bars, etc.
- Shopping expenditures at PEI 2014 events accounted for 1.6 percent of all shopping expenditures by motor coach parties.
- The total contribution to PEI tourism of the PEI 2014 celebrations in relation to motor coach tourists was \$38,046. This was the result of food and beverage and shopping expenditures at PEI 2014 events.

Figure 8
Impact of the PEI 2014 Celebrations/Event(s) on Motor Coach Tourists' Direct Expenditures



Note: These results are based on 21,002 motor coach tourists to PEI and total direct expenditures by these visitors of \$7,402,885.