

EXIT SURVEY REPORT SERIES: ES2023-08

NORTH CAPE COASTAL DRIVE (NCCD) REGION OVERNIGHT PLEASURE VISITOR PROFILE: RESULTS FROM THE 2023 EXIT SURVEY

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EXECUTIVE SUMMARY

Background and Purpose

- A visitor exit survey is a tool used to profile visitors and estimate their impact on a destination. It can capture visitor demographics and trip characteristics such as travel party size and composition, the purpose of their trip, regions visited, length of stay, type of accommodation used, activities participated in, expenditures, and trip evaluation.
- This report presents data collected via the 2023 PEI Travel Survey of Visitors (Exit Survey), from January 1st to December 31st, 2023, from only overnight pleasure visitors to PEI.
- For analysis purposes, the data was separated into the following five tourism seasons: 1) winter off-season (January 1 - April 30, 2023); 2) spring shoulder season (May 1-June 30, 2023); 3) summer main season (July 1-August 31, 2023); 4) fall shoulder season (September 1-October 31, 2023); and 5) winter off-season (November 1-December 31, 2023).
- The main purpose of this report was to provide a full range of statistics on the volume of overnight pleasure travellers to ***the North Cape Coastal Drive (NCCD)*** region in PEI during the study period (2023) and detailed characteristics of their trips such as purpose of trip, travel party size and party composition, PEI regions visited, activities participated in, travel expenditures, evaluation of trip, and demographic information about the overnight pleasure travellers.

EXECUTIVE SUMMARY (cont'd)

Samples Used and Margin of Error

- In total, 730 surveys were used in the study (overnight pleasure travellers to the NCCD region; 7.1% of total samples used).
- In terms of statistical accuracy, a sample of this size has a sampling error of ± 3.59 percent, at a 95 percent confidence level. It is important to note, that the information presented in this report are estimates to provide guidance only. Please exercise caution when interpreting significance of results throughout this report.

Travel Market Overview in 2023

- In total, over 1.61 million people visited PEI during the study period. This includes 119,500 cruise ship passengers (7.4% of total visitors) and 9,700 motor coach tourists (0.6% of total visitors). Of these, approximately 565,400 visitor parties (1,486,300) were estimated to have visited PEI in 2023 by way of the three exit points (excluding cruise travellers and motor coach tourists).
- Approximately 80 percent of these parties (451,400 parties) stayed at least one night in PEI (overnight visitor parties), while the remaining 114,000 parties (20%) visited PEI for a day trip (same-day visitor parties).
- Of these overnight visitor parties, while 91 percent (411,500 parties) primarily visited PEI for pleasure purposes including other purposes, 9 percent (39,900 parties) visited PEI for business purposes.

EXECUTIVE SUMMARY (cont'd)

PEI Regions Visited

- The region of PEI that was visited by the greatest percentage of ***all visitor parties*** was the Greater Charlottetown Area (70% of visitor parties). This was followed by the Green Gables Shore region (48%), the Summerside area (35%), the Red Sands Shore region (29%), the Points East Coastal Drive region (28%), and the North Cape Coastal Drive region (20%).
- Looking at PEI regions visited by ***overnight pleasure visitor parties***, the Greater Charlottetown Area (71%) was the most popular region for overnight pleasure travel parties, followed by the Green Gables Shore region (56%), the Summerside area (38%), the Points East Coastal Drive region (34%), the Red Sands Shore region (30%) and the North Cape Coastal Drive region (23%). Note that a “visit” was defined as dining, visiting an attraction, or participating in an activity in the region, and not travelling through the region only.

Overnight Stays in the NCCD

- It was appeared that the North Cape Coastal Drive region was the fifth most popular tourism region in PEI in terms of overnight stays by ***all types of overnight visitor parties***. Approximately eight percent of all overnight visitor parties stayed at least one night in the NCCD region and six percent of total accumulated nights in PEI (2,011,550 nights) was spent in the NCCD.
- Approximately eight percent of ***overnight pleasure travel parties*** stayed at least one night in the NCCD region and six percent of total accumulated nights in PEI (1,901,043 nights) were spent in the NCCD.

EXECUTIVE SUMMARY (cont'd)

Trend in Number of Visitors to the NCCD Region

- According to the PEI Tourism Volume Model estimation, approximately 1.62 million individual travellers visited PEI, an increase of 15 percent from the 1.40 million in 2022 and a decrease of 1 percent from the 1.63 million recorded in 2019.
- Estimated total number of visitors to the NCCD region in 2019 were approximately 415,000 people. Compared to this year, visitation to the NCCD has been steadily recovered at 68 percent in 2022 and 75 percent in 2023.
- It was estimated that a total of 311,300 people visited the NCCD region through the three exit and entry points in 2023, an increase of ten percent from the 284,000 in 2022.
- Of 411,500 overnight pleasure travel parties, 32,000 parties (8%) counted as having stayed at least one night in the NCCD region. These pleasure parties or individual travellers are the focus of this report.

EXECUTIVE SUMMARY (cont'd)

Who Visits the NCCD Region

- Of all NCCD overnight pleasure travel parties, approximately 90 percent of parties were from Canada, eight percent were from the United States, and one percent were from other international markets (i.e. a country other than the United States and Canada).
- The geographic markets that made up the greatest proportion of NCCD overnight pleasure parties were New Brunswick (35%), Ontario (20%), Quebec (15%), Nova Scotia (15%), and Alberta and British Columbia (4%).
- In terms of travel party characteristics, 45 percent of NCCD overnight pleasure travel parties travelled to PEI with their spouse/partner (two people), 16 percent travelled with immediate families (including children under 18), nine percent were single travellers, eight percent travelled with their friends, and seven percent travelled with other family members (e.g., sister, brother, grandparents).
- Looking at party composition, the majority of NCCD overnight pleasure travel parties were comprised of only adults (78%) while 22 percent considered families which were adult(s) with child(ren).
- Regarding age composition, 58 percent of NCCD overnight pleasure travel parties were senior travellers (55 and over), ten percent were middle aged travellers (35 to 54), and five percent were young adult travellers (18 to 34).
- Around 22 percent of NCCD overnight pleasure travel parties were families (adults with children) and 16 percent were comprised of travellers of varying age generation.

EXECUTIVE SUMMARY (cont'd)

Who Visits the NCCD Region (cont'd)

- The average party size for NCCD overnight pleasure travel parties was 3.05 people. While the average party size was highest during the January-April winter off-season at 4.45 people, the average party size was lowest during the November-December winter off-season at 2.13 people.
- Looking at individual overnight pleasure travellers to the NCCD region, they were comprised of more males than females (52% versus 48%).
- Approximately 23 percent were aged between 55 and 64, 21 percent were aged between 65 and 74, and 14 percent were aged between 45 and 54.
- Overall, approximately 76 percent of NCCD overnight pleasure travel parties had previously visited PEI. Over half of these parties had last visited PEI recently (53%): 29 percent had last visited earlier in the same year of the trip in which they were surveyed, and 24 percent had last visited one year ago.
- On average, repeat NCCD overnight pleasure travellers had visited PEI approximately 4.5 times in the past five years.

EXECUTIVE SUMMARY (cont'd)

Why Visitors Come

- Over half of NCCD overnight pleasure travel parties indicated that they visited PEI for holiday or vacation (52%), 21 percent travelled to PEI for visiting relatives and/or friends, and 12 percent travelled for a short getaway.
- Approximately 20 percent of NCCD overnight pleasure travel parties indicated they were primarily attracted to PEI by “other” features and 20 percent were attracted by “natural beauty and pastoral settings”. The majority of items specified in “other” category were family or friends related issues.
- Beaches and coastline (19%), restful and relaxing place (17%), outdoor activities (8%), golf (5%), festivals, events, or concerts (4%), Acadian cultural experiences (3%), and world of Anne of Green Gables and L.M. Montgomery (3%) were attracted other NCCD overnight pleasure travel parties to PEI.

EXECUTIVE SUMMARY (cont'd)

How Visitors Come

- Approximately 82 percent of NCCD overnight pleasure travel parties entered and exited PEI via the Confederation Bridge, eight percent used a combination of bridge and ferry, seven percent flew in and out of PEI, two percent used a combination of air and bridge/ferry, and one percent used the ferry service between PEI and Nova Scotia to enter and exit the province, and.
- Approximately nine percent of NCCD overnight pleasure travel parties used a rental car while travelling to PEI. Approximately 41 percent picked up the vehicle in Nova Scotia while 41 percent of those who used a rental car picked up the vehicle on PEI.

Where Visitors Stay

- The vast majority of NCCD overnight pleasure travel parties (86%) indicated that PEI was the primary destination of their pleasure trip.
- Overall, NCCD overnight pleasure travel parties to PEI stayed on average 5.77 nights (3.93 nights in paid accommodations in PEI and 1.09 nights in paid accommodations in PEI through a peer-to-peer lodging website such as Airbnb, VRBO, etc.).

EXECUTIVE SUMMARY (cont'd)

Where Visitors Stay (cont'd)

- NCCD overnight pleasure travel parties also spent overnight in other PEI regions. Approximately 23 percent of NCCD overnight pleasure travel parties stayed overnight in the Greater Charlottetown Area, 21 percent of parties stayed overnight in the Points East Coastal Drive region, 21 percent of parties stayed overnight in the Green Gables Shore region, 14 percent in the Summerside Area, and eight percent in the Red Sands Shore region with the average length of stays of 0.54, 0.54, 0.53, 0.25, and 0.16 nights, respectively.
- Although NCCD overnight pleasure travel parties stayed in a variety of accommodation types while on PEI, the most popular type of accommodation was home of friends or relatives (31% of parties stayed at least one night in this accommodation type), with the average length of stays of 1.18 nights.
- In addition, hotel, motel or resort (31%, campground/trailer park (24%), and cottage or cabin (18%) were the next favorite accommodations.
- Excluding the North Cape Coastal Drive region, Summerside Area was the most popular region for visitation among NCCD overnight pleasure travel parties (51% of NCCD overnight pleasure travel parties visited the region), followed by the Green Gables Shore region (50%), the Greater Charlottetown Area (48%), the Points East Coastal Drive region (35%), and the Red Sands Shore region (32%).

EXECUTIVE SUMMARY (cont'd)

What Visitors Do

- NCCD overnight pleasure travel parties participated in a variety of activities while travelling in PEI. Driving tour (scenic drives/views) was the most popular activity (63%).
- Over the full-year, other popular activities took part in by NCCD overnight pleasure travel parties included
- going to a beach (61%), going to a full-service restaurant (59%), seeing natural wonders (50%), sampling local culinary products (49%), sightseeing, appreciating pastoral or rural settings (48%), visiting a national or provincial park (45%), shopping for general merchandise (44%), shopping for local products (44%), visiting friends and/or relatives (41%), visiting historic/heritage sites or cultural attractions (35%), visiting Anne of Green Gables and related attractions (23%), going to a museum or art gallery (22%), using the Confederation Trail or other trails (20%), participating in nature-based outdoor activities (15%), attending a live performance/entertainment (12%), participating in water-based outdoor activities (11%), and attending a festival, event, or concert (11%).

EXECUTIVE SUMMARY (cont'd)

What Visitors Spend

- Total direct expenditures by NCCD overnight pleasure travel parties were estimated at more than **\$67 million** based on 32,006 overnight pleasure travel parties or 97,651 individual overnight pleasure travellers.
- The items that accounted for the greatest proportion of total expenditures were accommodations (38%), food and beverage at restaurants, bars, etc. (18%), vehicle operation (11%), food and beverage at stores (10%), shopping (9%), recreation and entertainment (5%), travel package (5%), other (4%), and car rental and local transportation (2%).
- NCCD overnight pleasure travel parties spent an average of \$2,151.93 **per party per night** on PEI. This average spending was highest among those who visited during the May-June spring shoulder season (\$2,510.15) and the July-August summer main season (\$2,419.64), and lowest by those who visited during the January-April winter off-season (\$1,186.52).
- NCCD overnight pleasure travel parties spent an average of \$122.34 **per person per night** on PEI. This average spending was highest among those who visited during the September-October fall shoulder season (\$130.01) and lowest by those who visited during and January-April winter off-season (\$99.84).

EXECUTIVE SUMMARY (cont'd)

How PEI Rates

- Visitors were asked to rank various PEI travel services. NCCD overnight pleasure travel parties were pleased with aspects of their trip to PEI including cleanliness and sanitary conditions (94%), the quality of customer service (93%), accommodation service and quality (92%), restaurant (90%), variety of things to see and do (86%), transportation (84%), and prices of goods and services (72%).
- The ratings for these items were greater than four on a five-point scale from one (very poor) to five (excellent), excluding “prices of goods and services.” “cleanliness and sanitary conditions” received an overall average rating of 4.52 on the same scale while “prices of goods and services” received a lower rating but still favourable at 3.90.
- Approximately eight percent of NCCD overnight pleasure travel parties indicated they experienced a problem or had a complaint about their trip to PEI.
- Despite the complaints regarding prices and taxes, etc., 91 percent of NCCD overnight pleasure travel parties agreed that their trip to PEI was good value for money spent. Over 95 percent of NCCD overnight pleasure travel parties indicated PEI was a safe and hygienic destination, they were satisfied with their trip to PEI, and the trip to PEI was a good way to spend their time.
- Overall, 95 percent of NCCD overnight pleasure travel parties agreed they would recommend PEI as a travel destination to others and 92 percent indicated they would visit PEI again.

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1-1. Background of the Study

- A visitor exit survey is a tool used to profile visitors and estimate their impact on a destination. It can capture visitor demographics and trip characteristics such as travel party size and composition, the purpose of their trip, regions visited, length of stay, type of accommodation used, activities participated in, expenditures, and trip evaluation.
- Prince Edward Island (“PEI”) has been conducting exit surveys since 1979 with the last study conducted in 2018 and 2019 during the period from July 1, 2018 to June 31, 2019 (the “study period”).
- The 2023 PEI Travel Survey of Visitors (Exit Survey) covered full twelve months from January 1 to December 31. Specifically, data presented in this report is for **overnight pleasure travellers who stayed at least one night in the North Cape Coastal Drive (NCCD)** region during the study period to profile their travel related behaviours in the NCCD region or in PEI.
- For analysis purposes, the data was separated into the following five tourism seasons:
 - Winter off-season (January 1 - April 30, 2023);
 - Spring shoulder season (May 1 - June 30, 2023);
 - Summer main season (July 1 - August 31, 2023);
 - Fall shoulder season (September 1 - October 31, 2023); and
 - Winter off-season (November 1 - December 31, 2023).

1-2. The Study Purpose

- The main purpose of this report was to provide a full range of statistics on the volume of overnight pleasure travellers who stayed at least one night in the NCCD region during the study period (January 1st to December 31st, 2023) and detailed characteristics of their trips such as purpose of trip, travel party size and party composition, PEI regions visited, activities participated in, travel expenditures, evaluation of trip, and demographic information about the overnight pleasure travellers.
- The survey pursued seven broad objectives:
 - To update existing historical information on NCCD overnight pleasure travellers to PEI,
 - To collect critical data to measure the overall importance of tourism in PEI,
 - To gather information regarding NCCD overnight pleasure travellers' behaviours,
 - To identify key market segments of NCCD overnight pleasure travellers to PEI, and
 - To enhance our knowledge and understanding of tourism (in general, and for PEI).
- ***Note that this report includes results for those who stayed at least one night in the North Cape Coastal Drive (NCCD) region including Tignish, Alberton, Mill River, O'Leary, West Point, North Cape, Tyne Valley, Mont Carmel, Miscouche, Lower New Annan, and Abram-Village during the study period. Since visitors may have stayed in multiple PEI regions, data presented in this report reflects their entire time in PEI and may include spending, activities, etc., that took place in other regions. Although many visitors would have visited the NCCD region for the day only and not spent the night, those visitors' activities, spending, etc., are not included in this report.***
- This report includes NCCD overnight pleasure traveller profiles by tourism season.

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2-1. Sampling Procedure

Target Population

- Mail-back questionnaires were distributed to non-resident visitors on PEI during the study period (January 1st to December 31st, 2023) as they exited PEI via the Charlottetown Airport, the Confederation Bridge, or the Wood Island's ferry terminal.
- The target population did not include cruise ship passengers and crew members, motor coach tourists, refugees, landed immigrants, or military Canadian residents.

Mail-back Questionnaire

- A representative of survey staff approached departing non-resident visitors at the Charlottetown Airport and drivers of non-PEI vehicles (based on their motor vehicle inspection sticker) at the Confederation Bridge and the Woods Island ferry terminal, explained the research study, and asked the individual if they would be willing to participate. If they agreed to participate, the individual was provided with a package containing the mail-back questionnaire.
- Responding to the survey was voluntary.

2-1. Sampling Procedure (cont'd)

Online Survey

- The survey package included a web address for the online version of the survey. Individuals who received the survey package had the option of completing the hard-copy questionnaire or the online version. Both versions of the survey were available in English and French.
- Tourism PEI also sent an email invitation to non-residents who requested PEI travel information between November 2022 and October 2023 and took the ferry when visiting PEI in 2023.
- To better capture respondents who took the ferry when visiting PEI, the 2023 customer list provided by the Northumberland Ferries Limited (NFL) was also used to invite participants to the online survey.

2-2. Sample Summary

Samples Collected and Used

- In total, 14,055 surveys were collected. Among these, 10,340 surveys (73.6%) were used to analyze the data for the 2023 exit survey.
- Of these 10,340 surveys, 46 percent were mail-back surveys and 54 percent were online surveys.
- Among these, 730 samples (7.1%) were NCCD overnight pleasure travel parties and used for this report.

	Surveys Collected		Surveys Used		Use Rate
	<i>N</i>	%	<i>N</i>	%	%
Mail-back Survey	4,794	34.1%	4,760	46.0%	99.3%
Online Survey	9,261	65.9%	5,580	54.0%	60.3%
Total	14,055	100.0%	10,340	100.0%	73.6%

2-2. Sample Summary (cont'd)

Sample Size and Margin of Error

- The margin of error associated with the total sample and the specific sub-groups used (i.e. tourism season) in this report is summarized in the Table below. 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 for overnight pleasure travellers to the NCCD region has a sampling error of ± 3.59 percent at a 95 percent confidence level. The margins of error for the five sub-groups are higher. Please note this is a guideline only. Caution should be applied when interpreting significance testing throughout this report.

	Overnight Pleasure		
	Sample Size	% of Sample Size	Margin of Error ^{a)}
2023 Jan-Apr Winter Off-Season	32	4.4%	± 17.25
2023 May-Jun Spring Shoulder Season	118	16.2%	± 8.87
2023 Jul-Aug Summer Main Season	373	51.1%	± 5.01
2023 Sep-Oct Fall Shoulder Season	165	22.6%	± 7.53
2023 Nov-Dec Winter Off-Season	42	5.8%	± 15.00
Full-Year (12 months)	730	100.0%	± 3.59

2-3. Data Processing

Data Processing and Error Detection

- All mail-back questionnaires were reviewed manually to determine if they were complete and coherent.
- Data were captured, coded, 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

- Some data used in the study were imputed. Data 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 visitors were estimated using the 2012, 2014 and 2018-2019 PEI exit survey data sets.
- 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 (a combination of a minimum number of questionnaires and maximum weight) based on the exit point traffic counts.

2-4. Data Weighting

Bias Adjustment

- For estimation purposes, the responses obtained through the questionnaires must be treated as a simple random sample from the total traffic in each stratum (three exit points, by same-day and overnight visitors, by origin and by month).
- The data may be subject to some degree of “*distribution bias*” since not all categories of visitors are represented in the distribution or to a “*non-response bias*” because the individuals replying may not be representative of the visitor population.

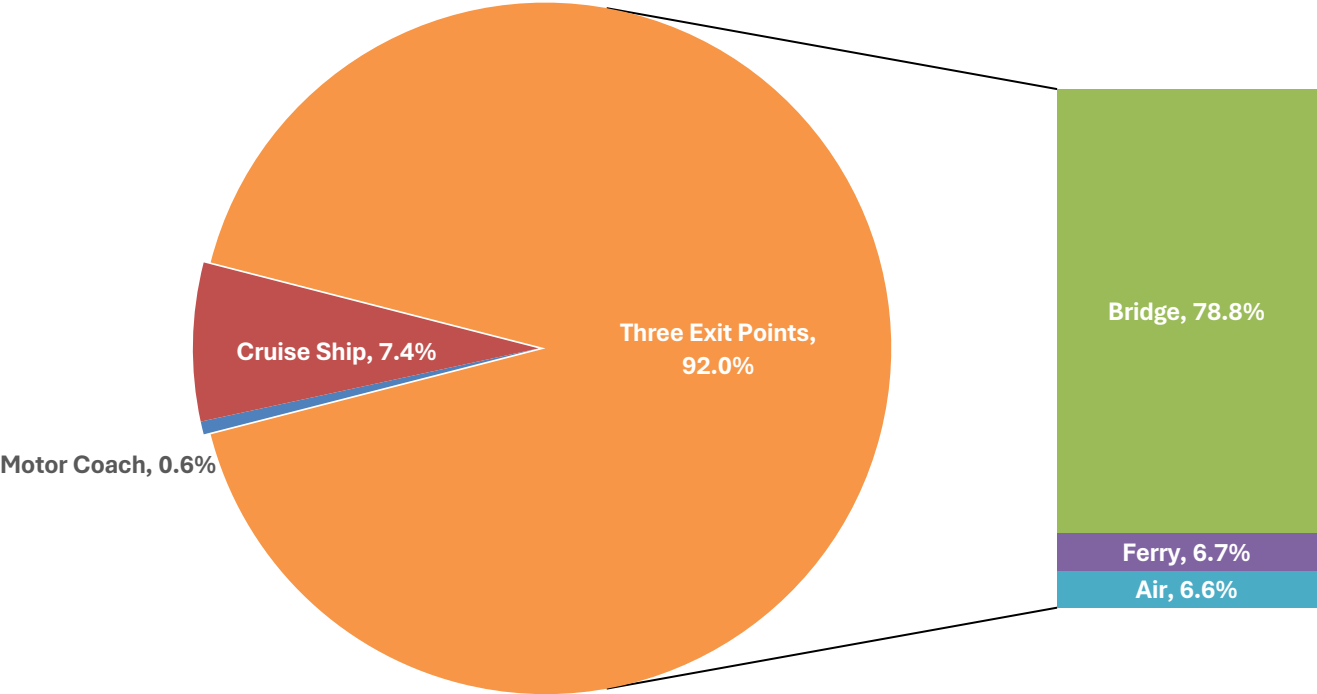
Weighting the Sample

- Weighting techniques used in the estimation process attempt to reduce the effect of biases and were also performed to determine aggregate visitor parties’ characteristics.
- The final survey sample was weighted by same-day and overnight visitor parties, three exit points, five tourism seasons, and the 22 origins of visitor parties. This aligns with the total PEI visitor parties within the *PEI Tourism Volume Model*, which utilizes traffic data collected through the three exit points.
- Despite the weighting of the sample to address biases, it is important to 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 not based on all survey questions.

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3-1. Overview of Total Visitation in PEI

Figure 1: Total Visitation in 2023



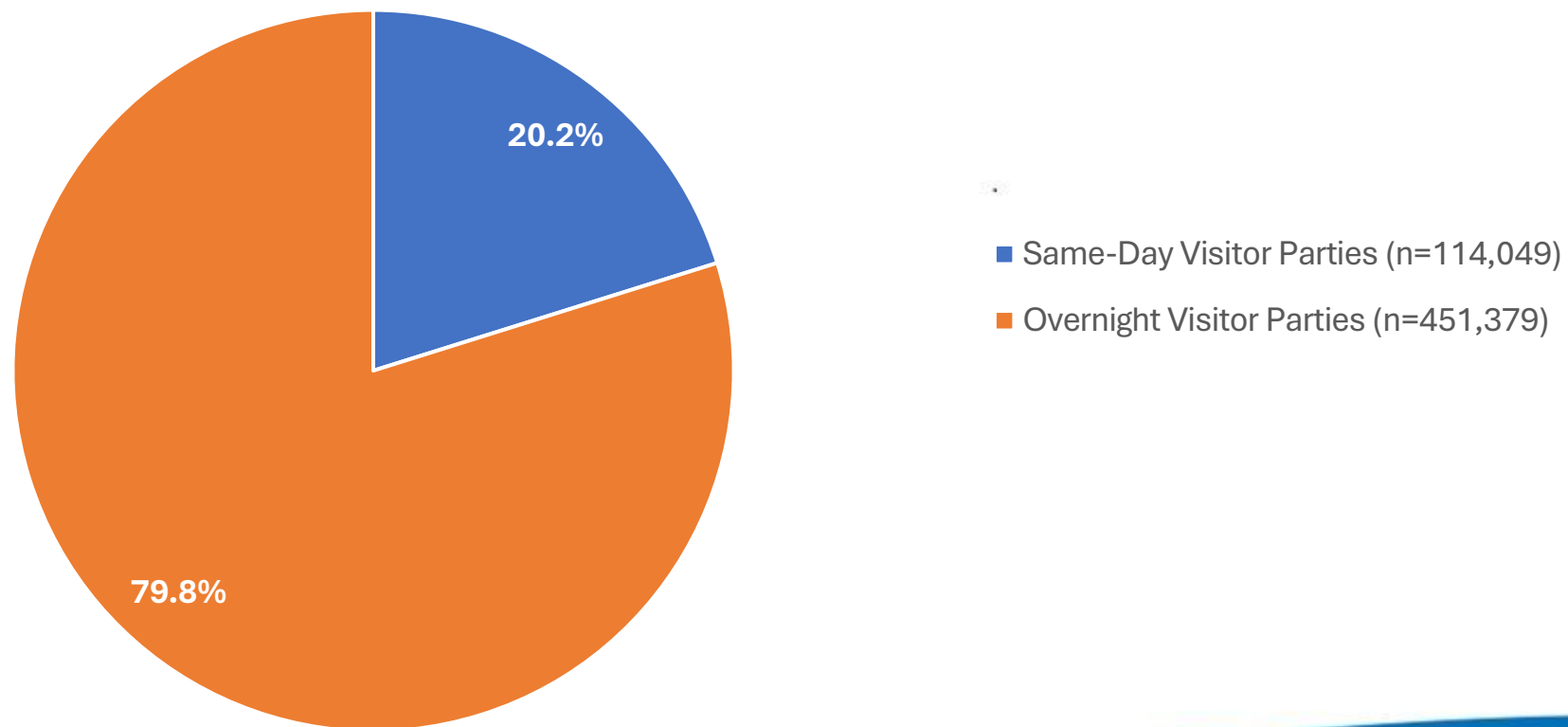
Source: 2023 PEI Tourism Volume Model

Table 1: Estimated Number of Visitors to PEI in 2023

	Number of Visitors	Percent of Visitors
Visitors by Exit Point	1,486,251	92.0%
Bridge	1,272,476	78.8%
Ferry	107,950	6.7%
Air	105,825	6.6%
Motor Coach Tourists	9,742	0.6%
Cruise Travellers	119,488	7.4%
Total	1,615,481	100.0%

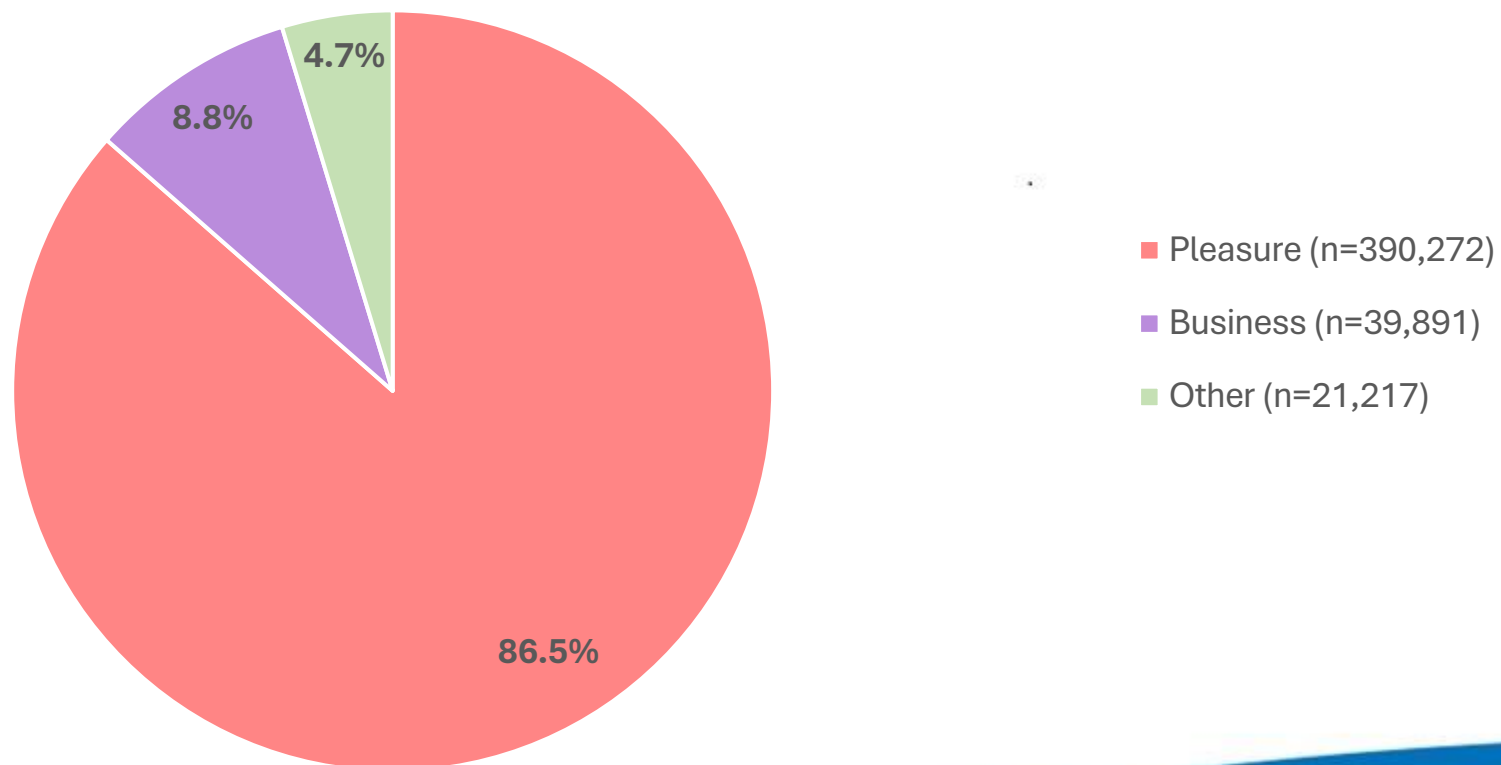
3-2. Overall Market Situation in PEI

Figure 2: Total Travel Market in PEI (2023)
(Total Visitor Parties $N = 565,428$)



3-3. Overnight Travel Market in PEI

Figure 3: Overnight Travel Market in PEI (2023)
(Total Overnight Parties N = 451,379)



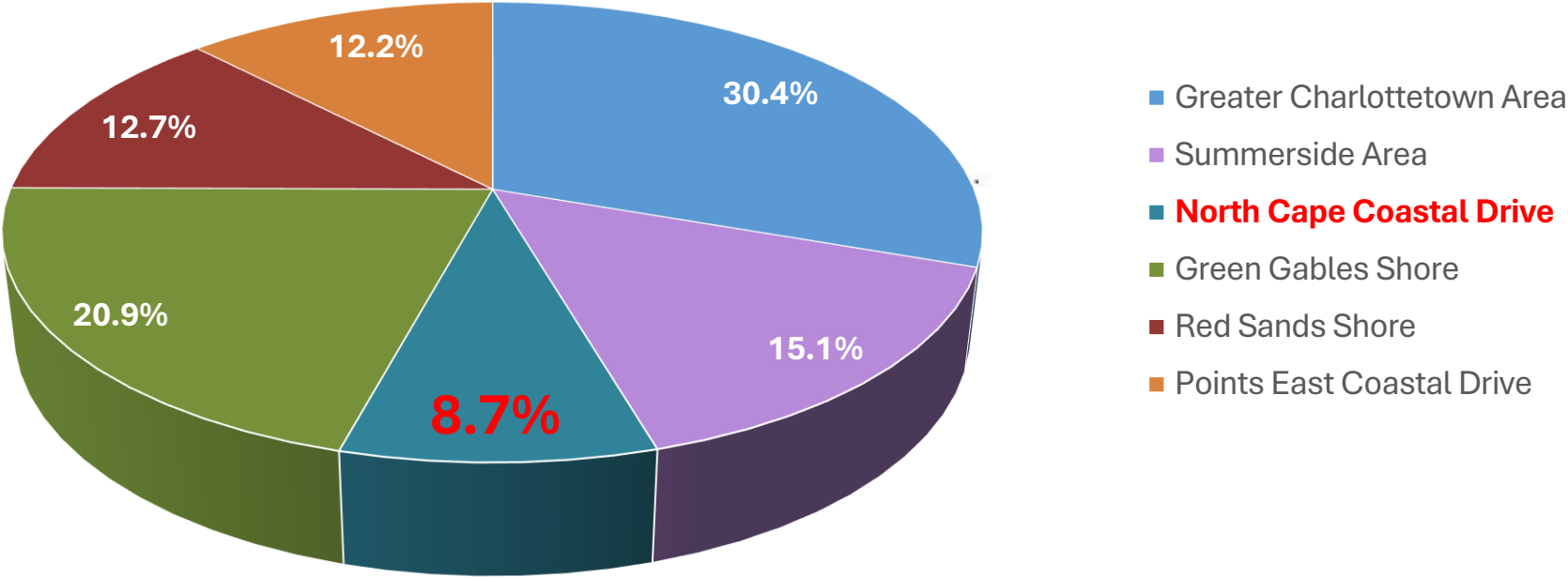
3-4. PEI Regions Visited by All Visitor Parties

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year	Total Visits
Total Parties <i>N</i> (%)	97,992 (17.3%)	96,200 (17.0%)	214,137 (37.9%)	102,421 (18.1%)	54,678 (9.7%)	565,428 (100.0%)	(%)*
Greater Charlottetown Area	72.8%	70.8%	69.0%	69.3%	66.1%	69.7%	(30.4%)
Summerside Area	31.1%	37.7%	36.8%	34.2%	29.0%	34.7%	(15.1%)
North Cape Coastal Drive	9.7%	22.1%	23.8%	24.5%	12.0%	20.0%	(8.7%)
Green Gables Shore	17.2%	49.9%	65.2%	54.2%	20.8%	48.0%	(20.9%)
Red Sands Shore	16.9%	29.8%	35.0%	31.3%	22.3%	29.1%	(12.7%)
Points East Coastal Drive	17.5%	32.5%	33.3%	28.5%	18.0%	28.1%	(12.2%)
Total Visits (Parties)	161,907	233,588	563,100	247,965	91,947	1,298,507	(100.0%)
Total Visits (%)	(12.5%)	(18.0%)	(43.4%)	(19.1%)	(7.1%)	(100.0%)	

Note: Results were based on multiple responses; Percent in each of the regions and seasons was based on total visitor parties regardless of type of visitation (same-day and overnight) and trip purpose (total all visitor parties *n* = 565,428); * (%) was based on total visits (total parties *n* = 1,298,507); **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

3-4. PEI Regions Visited by All Visitor Parties (cont'd)

Figure 4: Breakdown of Total Visits by All Visitor Parties to PEI Regions
(Total Parties N = 1,298,507)



Note: Result was based on total visits by all visitor parties (same-day and overnight) to PEI regions (total parties n = 1,298,507).

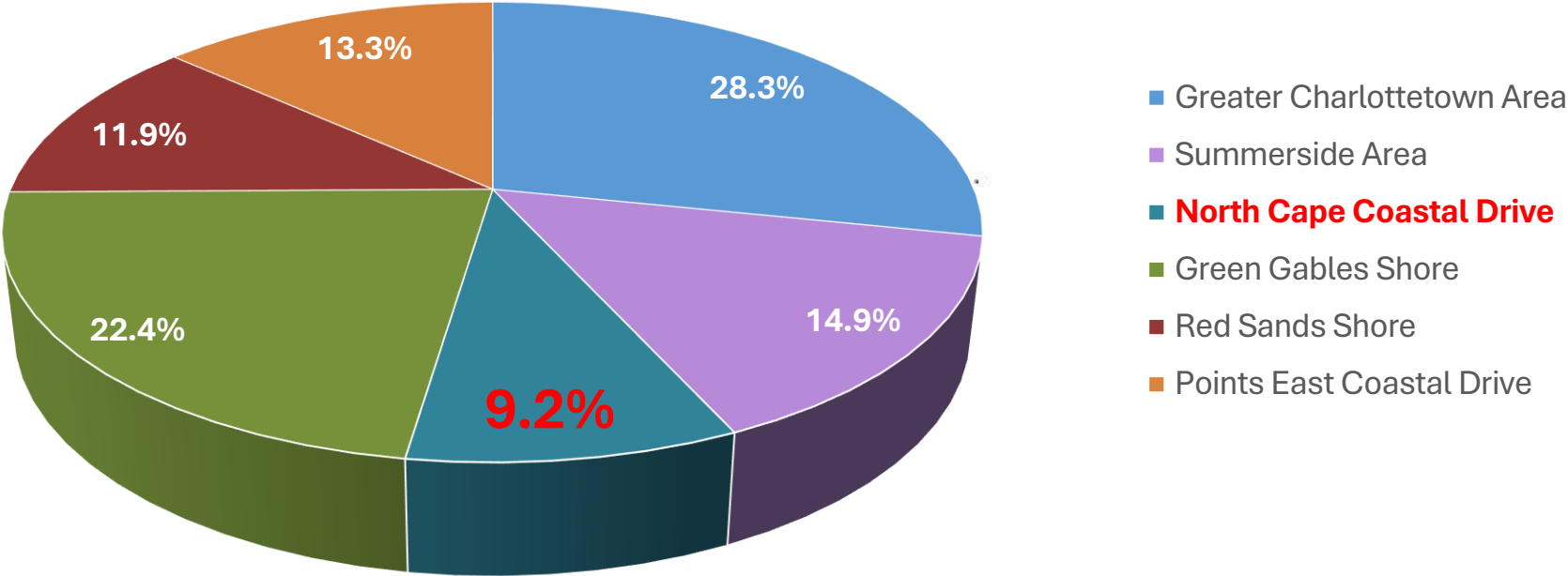
3-5. PEI Regions Visited by Overnight Pleasure Travel Parties

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year	Total Visits
Overnight Pleasure Parties <i>N</i> (%)	59,703 (14.5%)	66,044 (16.1%)	174,754 (42.5%)	73,537 (17.9%)	37,450 (9.1%)	411,488 (100.0%)	(%)*
Greater Charlottetown Area	75.3%	73.1%	69.3%	69.3%	72.6%	71.1%	(28.3%)
Summerside Area	29.3%	41.2%	40.6%	38.3%	28.3%	37.5%	(14.9%)
North Cape Coastal Drive	11.5%	23.4%	27.1%	30.0%	9.8%	23.2%	(9.2%)
Green Gables Shore	20.5%	60.7%	70.3%	64.3%	26.2%	56.4%	(22.4%)
Red Sands Shore	15.3%	32.7%	34.4%	32.5%	21.9%	29.9%	(11.9%)
Points East Coastal Drive	20.9%	39.9%	37.6%	35.4%	19.3%	33.5%	(13.3%)
Total Visits (Parties)	103,082	178,933	487,977	198,350	66,692	1,035,034	(100.0%)
Total Visits (%)	(10.0%)	(17.3%)	(47.1%)	(19.2%)	(6.4%)	(100.0%)	

Note: Results were based on multiple responses; Percent in each of the regions and seasons was based on total overnight pleasure travel parties (total pleasure travel parties *n* = 411,489); * (%) was based on total visits (total parties *n* = 1,298,507); **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

3-5. PEI Regions Visited by Overnight Pleasure Travel Parties (cont'd)

Figure 5: Breakdown of Total Visits by Overnight Pleasure Travel Parties to PEI Regions
(Total Overnight Pleasure Parties N = 1,035,034)



Note: Result was based on total visits by overnight pleasure travel parties to PEI regions (total parties n = 1,035,034).

3-6. Overnight Stays (Parties) in PEI Regions by All Overnight Visitor Parties - Total Accumulated Parties Staying at Least One Night in the Specific Region

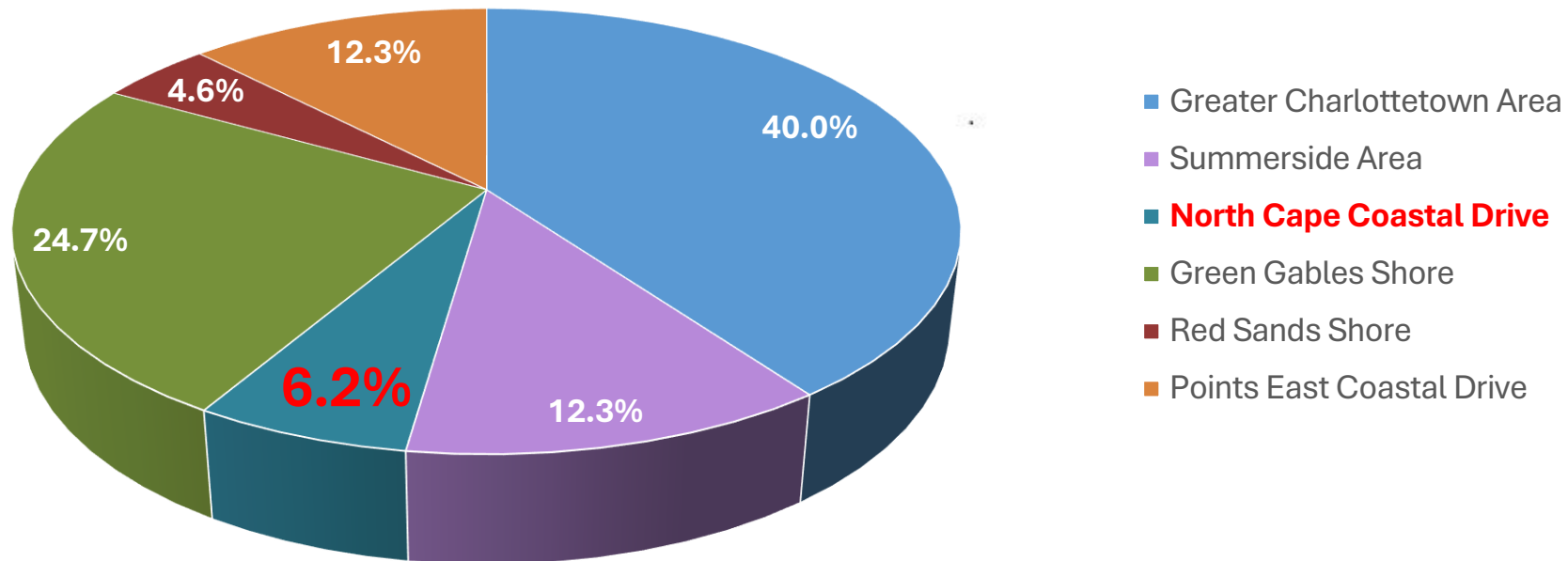
	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year	Total Overnight Stays
Total Overnight Parties <i>N</i> (%)	74,702 (16.5%)	74,651 (16.5%)	178,622 (39.6%)	80,398 (17.8%)	43,006 (9.5%)	451,379 (100.0%)	(%)*
Greater Charlottetown Area	66.6%	46.3%	36.7%	42.7%	61.3%	46.6%	(40.0%)
Summerside Area	16.1%	15.8%	11.7%	13.7%	20.4%	14.3%	(12.3%)
North Cape Coastal Drive	5.2%	5.3%	9.0%	8.0%	5.9%	7.3%	(6.2%)
Green Gables Shore	4.0%	29.5%	42.2%	31.5%	9.6%	28.8%	(24.7%)
Red Sands Shore	4.1%	3.2%	6.4%	5.0%	7.0%	5.3%	(4.6%)
Points East Coastal Drive	7.6%	17.5%	15.8%	16.2%	10.5%	14.3%	(12.3%)
Total Overnight Stays (Parties)	77,366	87,794	217,547	94,167	49,333	526,207	(100.0%)
Total Overnight Stays (%)	(14.7%)	(16.7%)	(41.3%)	(17.9%)	(9.4%)	(100.0%)	

Note: Results were based on multiple responses; Percent in each of the regions and seasons was based on total visitor parties regardless of their trip purpose (total all overnight visitor parties *n* = 451,379); * (%) was based on total overnight stays by parties (total parties *n* = 526,207); **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

3-6. Overnight Stays (Parties) in PEI Regions by All Overnight Visitor Parties

- Total Accumulated Parties Staying at Least One Night in the Specific Region (cont'd)

Figure 6: Breakdown of Total Overnight Stays (Parties) by All Overnight Visitor Parties in PEI Regions
(Total Overnight Parties $N = 526,207$)



Note: Result was based on total overnight stays (parties) by all overnight visitor parties in PEI regions (total parties $n = 526,207$).

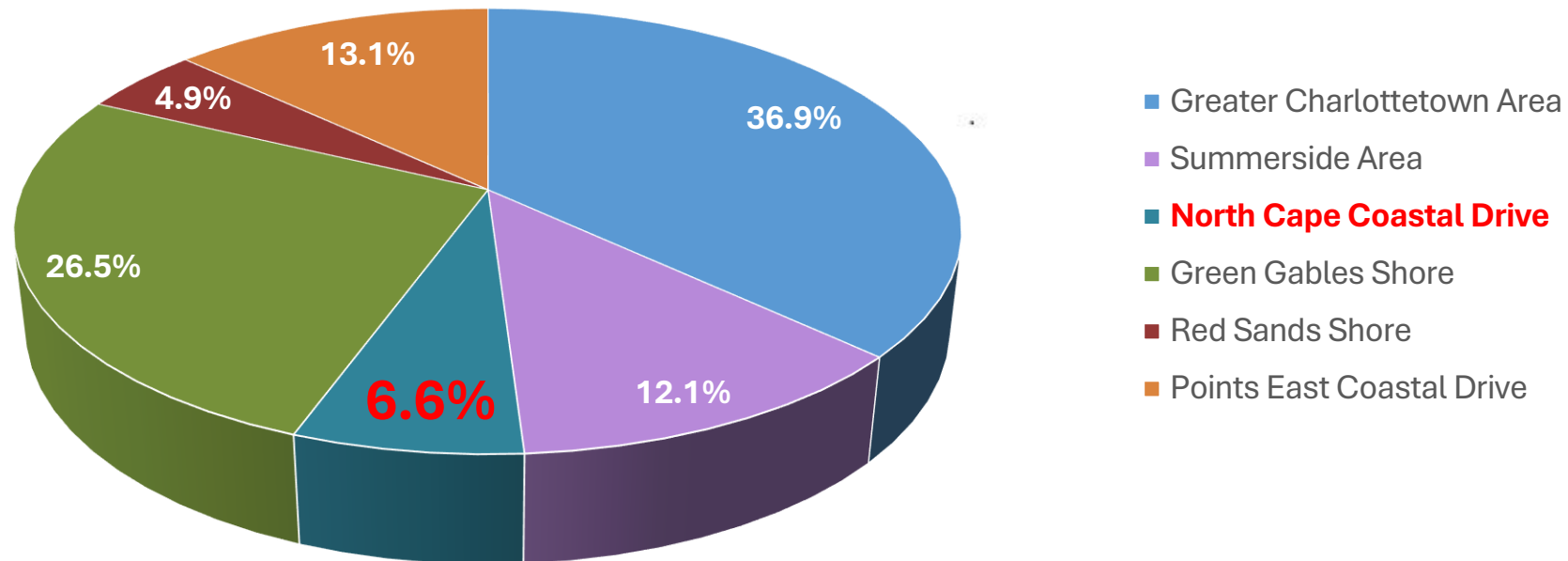
3-7. Overnight Stays (Parties) in PEI Regions by Overnight Pleasure Travel Parties - Total Accumulated Parties Staying at Least One Night in the Specific Region

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year	Total Overnight Stays
Overnight Pleasure Parties <i>N</i> (%)	59,703 (14.5%)	66,044 (16.1%)	174,754 (42.5%)	73,537 (17.9%)	37,450 (9.1%)	411,488 (100.0%)	(%)*
Greater Charlottetown Area	62.5%	41.8%	35.7%	40.3%	58.5%	43.5%	(36.9%)
Summerside Area	16.1%	17.3%	11.9%	12.8%	19.7%	14.2%	(12.1%)
North Cape Coastal Drive	6.1%	5.3%	9.1%	8.7%	6.8%	7.8%	(6.6%)
Green Gables Shore	5.0%	32.5%	42.8%	34.3%	10.7%	31.2%	(26.5%)
Red Sands Shore	4.9%	3.5%	6.5%	5.3%	8.0%	5.7%	(4.9%)
Points East Coastal Drive	9.5%	18.9%	16.1%	17.2%	11.7%	15.4%	(13.1%)
Total Overnight Stays (Parties)	62,107	78,759	213,376	87,206	43,207	484,655	(100.0%)
Total Overnight Stays (%)	(12.8%)	(16.3%)	(44.0%)	(18.0%)	(8.9%)	(100.0%)	

Note: Results were based on multiple responses; Percent in each of the regions and seasons was based on total overnight pleasure travel parties regardless of their trip purpose (total parties *n* = 411,488); * (%) was based on total overnight stays by parties (total parties *n* = 484,655); **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

3-7. Overnight Stays (Parties) in PEI Regions by Overnight Pleasure Travel Parties - Total Accumulated Parties Staying at Least One Night in the Specific Region (cont'd)

Figure 7: Breakdown of Total Overnight Stays (Parties) by Overnight Pleasure Travel Parties in PEI Regions
(Total Overnight Pleasure Parties $N = 484,655$)



Note: Result was based on total overnight stays (parties) by all overnight visitor parties in PEI regions (total parties $n = 484,655$).

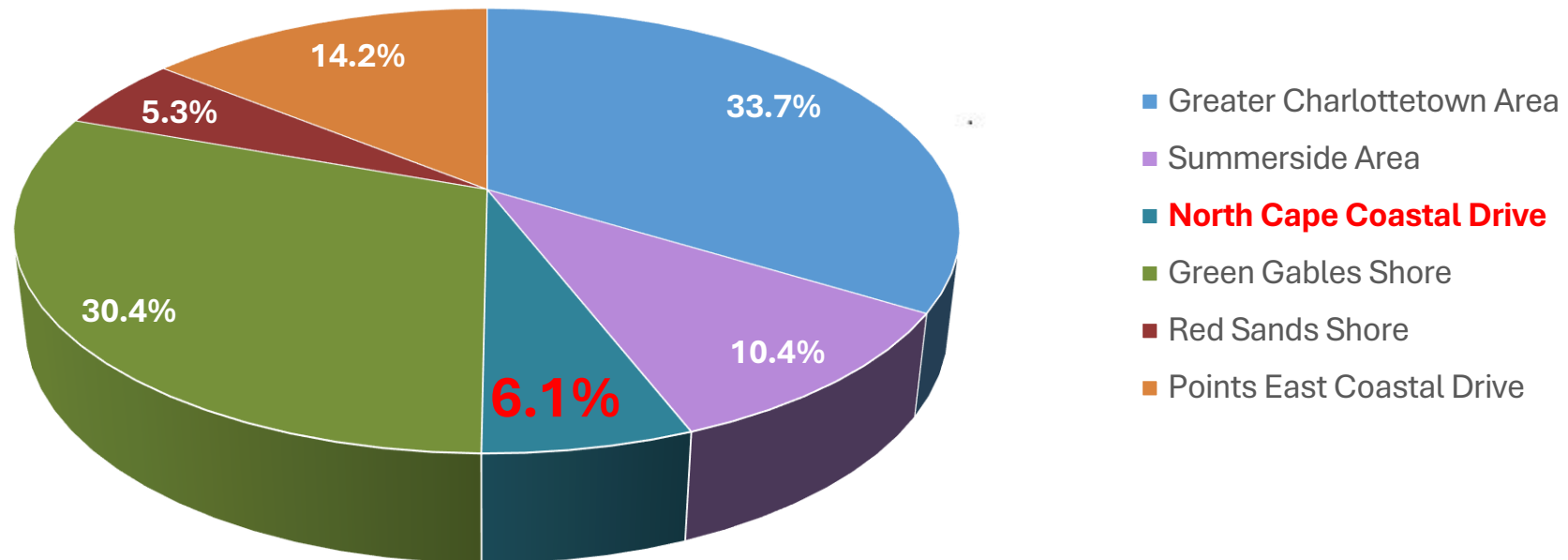
3-8. Overnight Stays (Nights) in PEI Regions by All Overnight Visitor Parties - Total Accumulated Nights Staying at Least One Night in the Specific Region

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Total Overnight Parties N (%)	74,702 (16.5%)	74,651 (16.5%)	178,622 (39.6%)	80,398 (17.8%)	43,006 (9.5%)	451,379 (100.0%)
Greater Charlottetown Area	62.3%	33.8%	24.4%	29.2%	54.3%	33.7%
Summerside Area	15.6%	11.3%	8.0%	9.7%	15.2%	10.4%
North Cape Coastal Drive	3.7%	4.1%	7.4%	6.1%	5.8%	6.1%
Green Gables Shore	4.8%	30.4%	40.1%	32.9%	7.0%	30.4%
Red Sands Shore	5.7%	3.6%	5.6%	5.8%	5.7%	5.3%
Points East Coastal Drive	7.9%	16.8%	14.5%	16.3%	11.9%	14.2%
Total Overnight Stays (Nights)	249,601	316,503	921,367	370,979	153,100	2,011,550
Total Overnight Stays (%)	(12.4%)	(15.7%)	(45.8%)	(18.4%)	(7.6%)	(100.0%)

Note: Results were based on multiple responses and total accumulated stays (nights) spent by all overnight visitor parties in the specific region (total nights $n = 2,011,550$).

3-8. Overnight Stays (Nights) in PEI Regions by All Overnight Visitor Parties - Total Accumulated Nights Staying at Least One Night in the Specific Region (cont'd)

Figure 8: Breakdown of Total Overnight Stays (Nights) by All Overnight Visitor Parties in PEI Regions
(Total Nights $N = 2,011,550$)



Note: Result was based on total overnight stays (nights) by all overnight visitor parties in PEI regions (total nights $n = 2,011,550$).

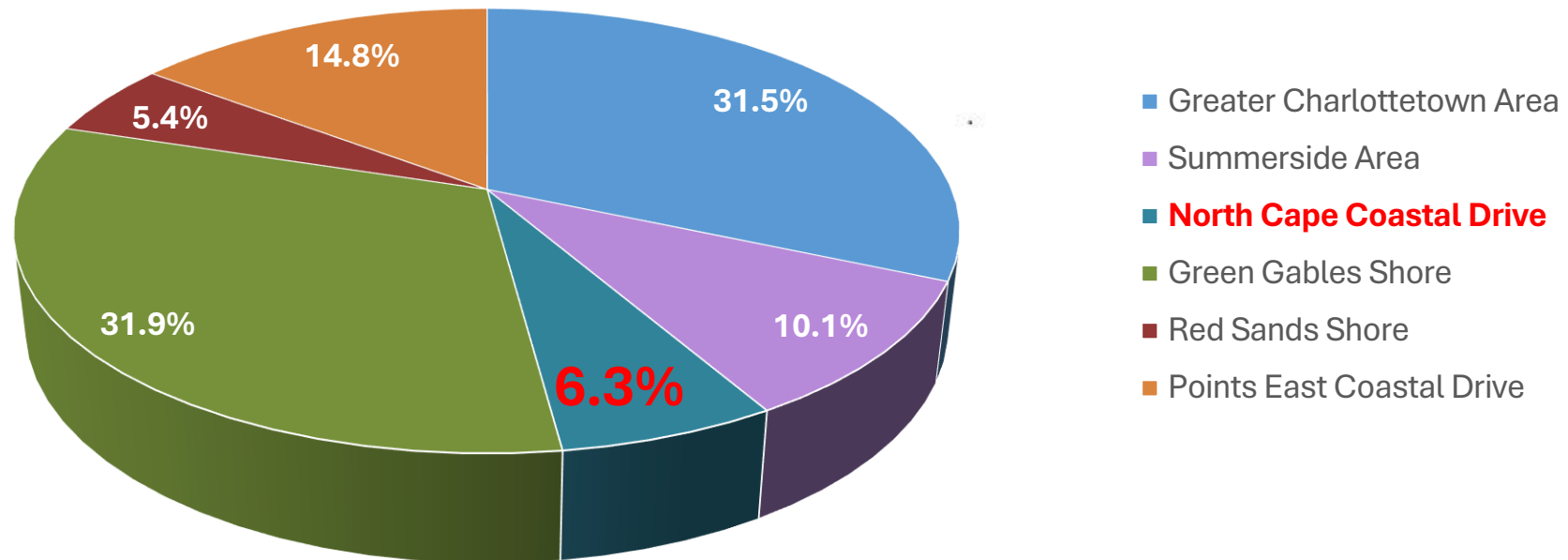
3-9. Overnight Stays (Nights) in PEI Regions by Overnight Pleasure Travel Parties - Total Accumulated Nights Staying at Least One Night in the Specific Region

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	59,703 (14.5%)	66,044 (16.1%)	174,754 (42.5%)	73,537 (17.9%)	37,450 (9.1%)	411,488 (100.0%)
Greater Charlottetown Area	60.7%	29.6%	23.8%	27.4%	51.9%	31.5%
Summerside Area	15.1%	11.9%	8.1%	8.7%	15.2%	10.1%
North Cape Coastal Drive	4.1%	4.3%	7.4%	6.4%	6.4%	6.3%
Green Gables Shore	5.7%	32.7%	40.5%	34.7%	7.7%	31.9%
Red Sands Shore	5.4%	3.8%	5.6%	5.8%	6.2%	5.4%
Points East Coastal Drive	9.1%	17.7%	14.6%	17.1%	12.6%	14.8%
Total Overnight Stays (Nights)	212,999	290,837	909,384	350,298	137,525	1,901,043
Total Overnight Stays (%)	(11.2%)	(15.3%)	(47.8%)	(18.4%)	(7.2%)	(100.0%)

Note: Results were based on multiple responses and total accumulated stays (nights) spent by overnight pleasure travel parties in the specific region (total nights *n* = 1,901,043).

3-9. Overnight Stays (Nights) in PEI Regions by Overnight Pleasure Travel Parties - Total Accumulated Nights Staying at Least One Night in the Specific Region (cont'd)

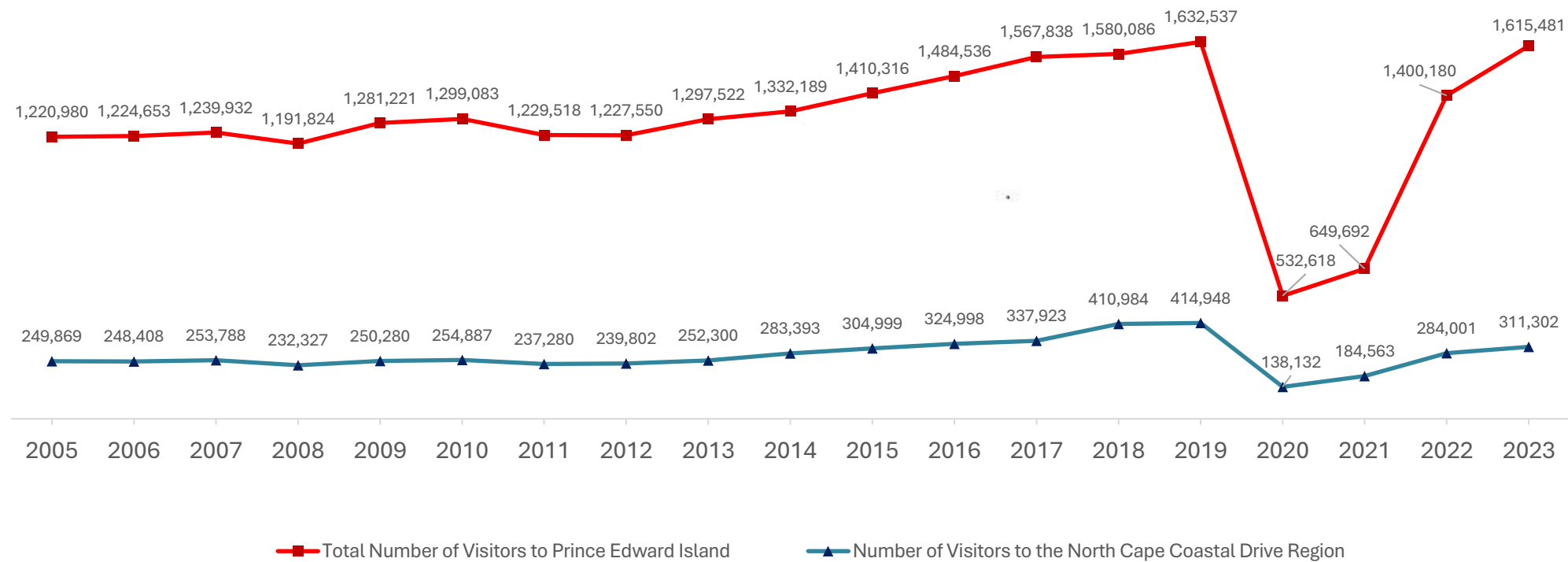
Figure 9: Breakdown of Total Overnight Stays (Nights) by Overnight Pleasure Travel Parties in PEI Regions
(Total Nights $N = 1,901,043$)



Note: Result was based on total overnight stays (nights) by overnight pleasure travel parties in PEI regions (total nights $n = 1,901,043$).

3-10. Trend in Number of Visitors to the North Cape Coastal Drive Region

Figure 10: Yearly Trend in Number of Visitors to Prince Edward Island and the North Cape Coastal Drive Region (2005 to 2023)



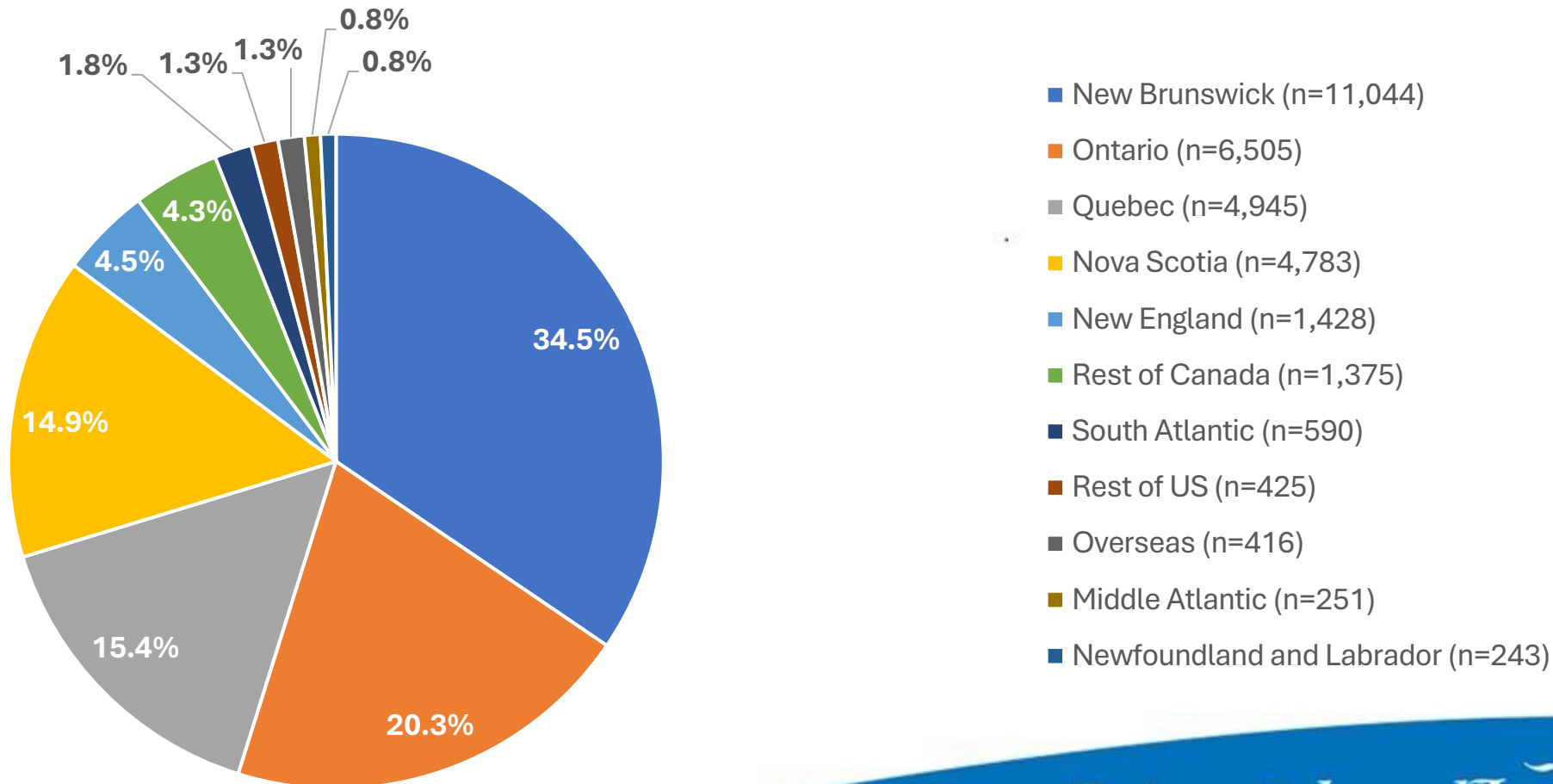
Note: Results were estimated by using the PEI Tourism Volume Model with the 2007-2008, 2012, 2014, 2018-2019 and 2023 exit survey data sets.



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4-1. Origin of Overnight Pleasure Travel Parties to the North Cape Coastal Drive Region

Figure 11: Origin of NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties N = 32,006)



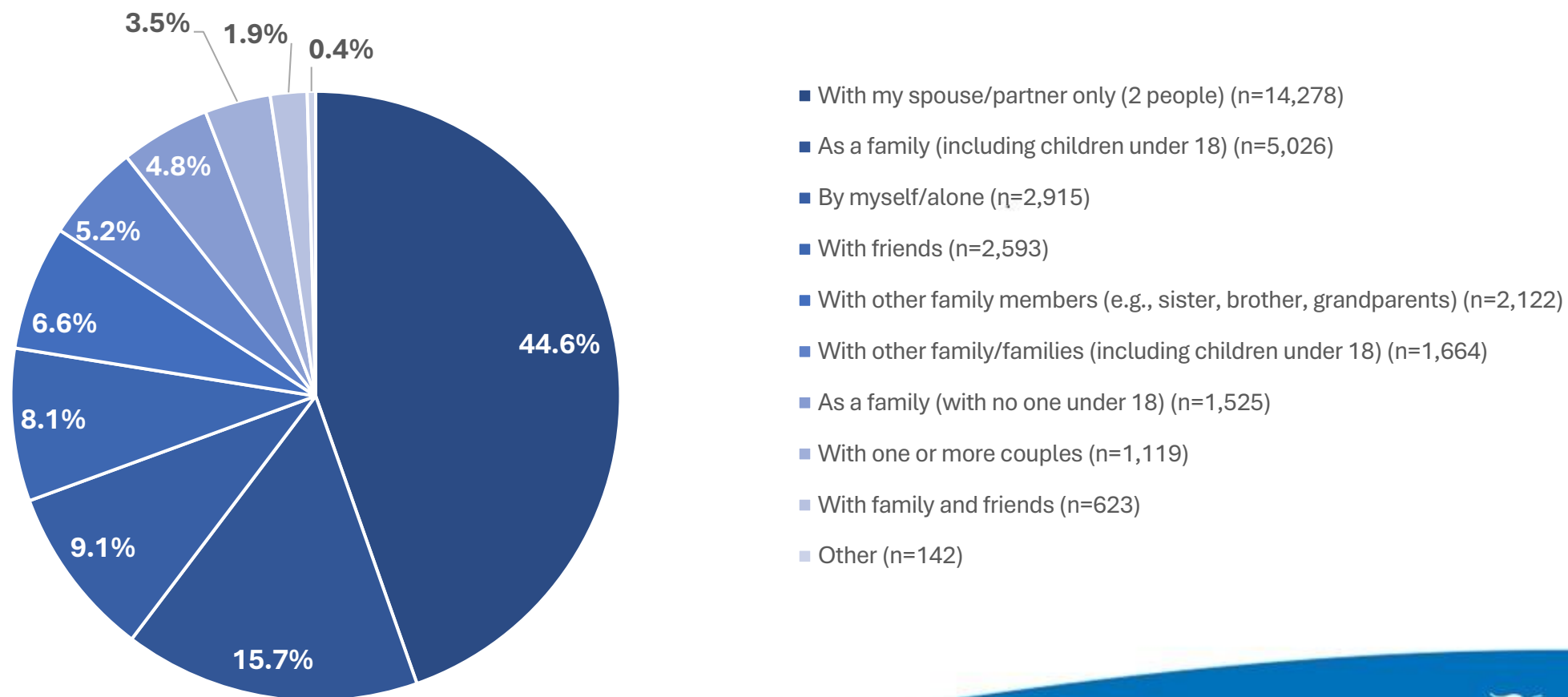
4-1. Origin of Overnight Pleasure Travel Parties to the NCCD (cont'd)

	2023 Jan-Apr Winter Off-Season	2023 May-Jun Spring Shoulder Season	2023 Jul-Aug Summer Main Season	2023 Sep-Oct Fall Shoulder Season	2023 Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Canada	88.0%	82.8%	91.2%	92.3%	93.1%	90.3%
New Brunswick	58.6%	28.5%	28.0%	34.8%	48.5%	34.5%
Nova Scotia	14.2%	5.2%	16.7%	18.1%	10.6%	14.9%
Newfoundland & Labrador	0.0%	1.1%	1.2%	0.1%	0.0%	0.8%
Quebec	0.3%	14.5%	18.2%	15.1%	22.4%	15.4%
Ontario	14.1%	27.4%	21.9%	20.1%	9.9%	20.3%
Manitoba & Saskatchewan	0.0%	1.0%	0.5%	0.6%	0.0%	0.5%
Alberta & British Columbia	0.8%	5.2%	4.6%	3.4%	1.2%	3.7%
Nunavut, Northwest Territories & Yukon	0.0%	0.1%	0.1%	0.1%	0.3%	0.1%
United States	11.4%	15.7%	7.3%	6.5%	6.1%	8.4%
New England	9.5%	6.2%	3.5%	2.8%	5.1%	4.5%
Middle Atlantic	0.0%	2.5%	0.5%	1.3%	0.0%	0.8%
South Atlantic	0.0%	4.1%	2.4%	0.7%	0.4%	1.8%
Rest of US	1.9%	2.9%	0.8%	1.7%	0.5%	1.3%
International	0.6%	1.5%	1.5%	1.2%	0.9%	1.3%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

4-2. Party Characteristics

Figure 12: Characteristics of NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties $N = 32,006$)



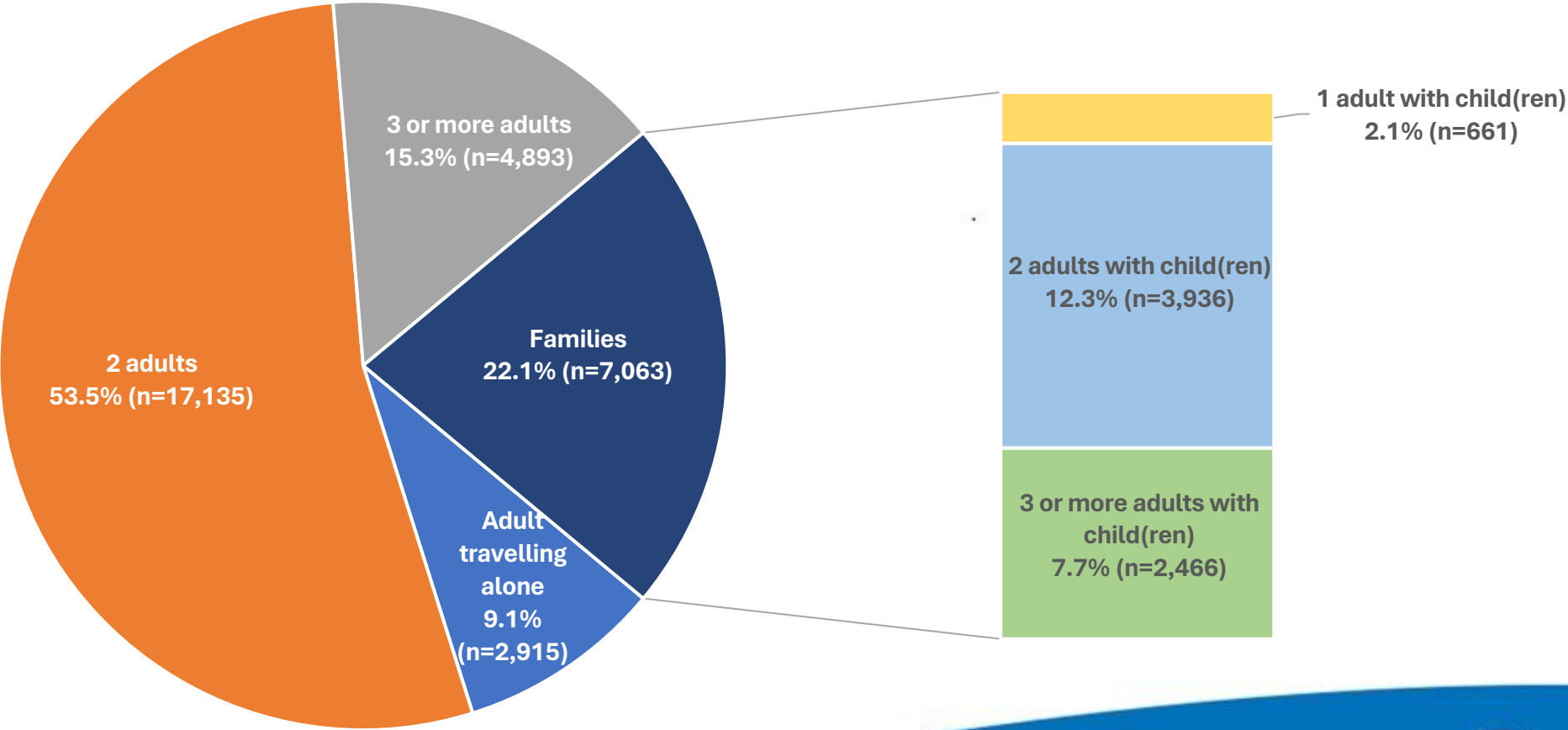
4-2. Party Characteristics (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
With my spouse/partner only (2 people)	24.2%	47.6%	45.3%	51.0%	49.3%	44.6%
As a family (including children under 18)	40.7%	3.0%	18.6%	0.4%	17.2%	15.7%
By myself/alone	4.9%	6.6%	9.4%	6.0%	25.0%	9.1%
With friends	5.7%	16.5%	2.9%	19.0%	5.1%	8.1%
With other family members (e.g., sister, brother, grandparents)	12.5%	5.6%	6.1%	6.8%	2.1%	6.6%
With other family/families (including children under 18)	11.7%	11.3%	5.2%	0.1%	0.0%	5.2%
As a family (with no one under 18)	0.0%	1.3%	6.3%	6.9%	1.3%	4.8%
With one or more couples	0.0%	6.5%	2.6%	7.3%	0.0%	3.5%
With family and friends	0.0%	1.5%	3.1%	1.1%	0.0%	1.9%
Other	0.3%	0.0%	0.3%	1.3%	0.0%	0.4%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

4-3. Party Composition

Figure 13: Composition of NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties N = 32,006)



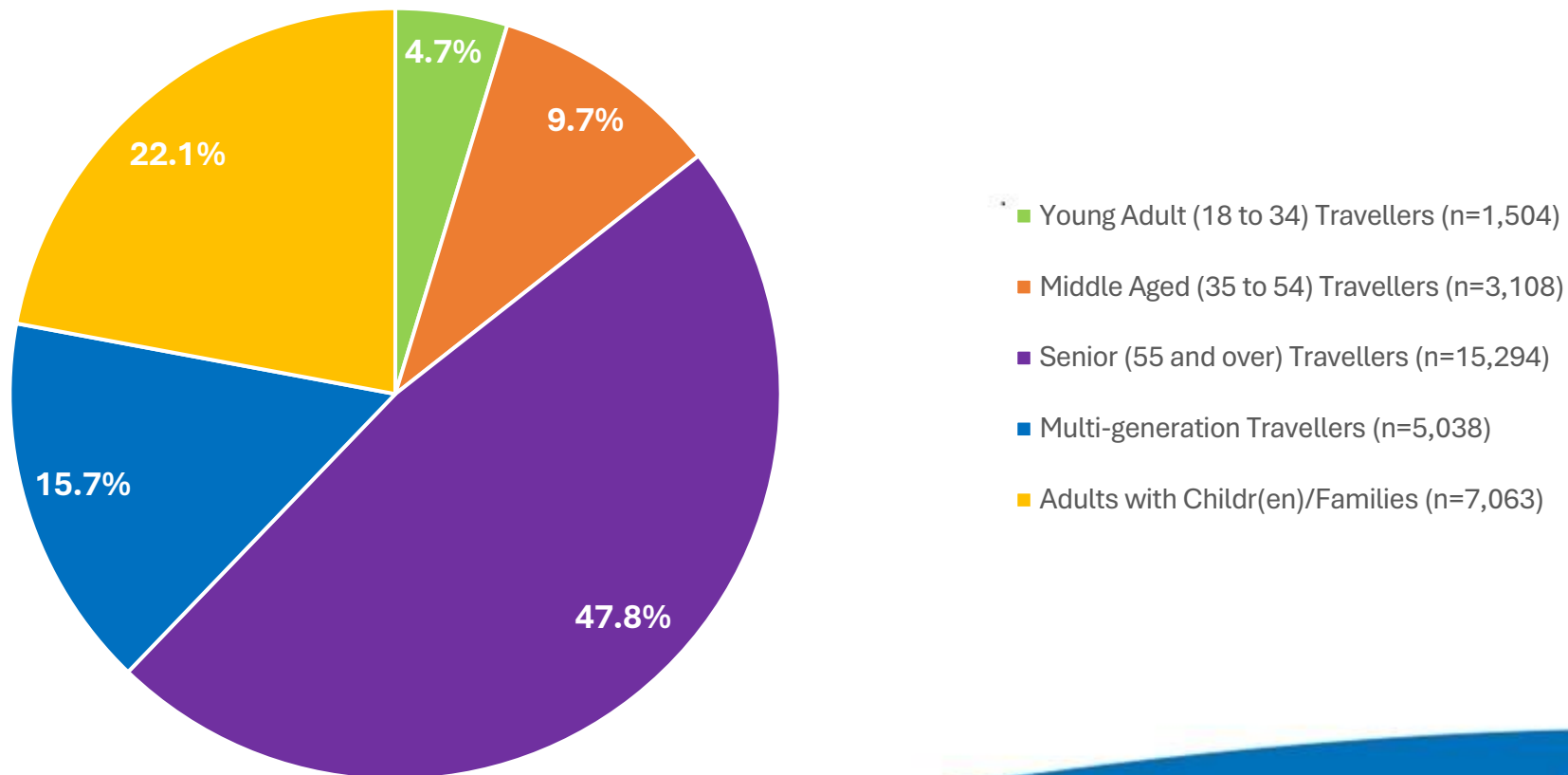
4-3. Party Composition (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Adult travelling alone	4.9%	6.6%	9.4%	6.0%	25.0%	9.1%
2 adults	30.4%	57.3%	52.5%	66.5%	55.6%	53.5%
3 or more adults	12.3%	21.0%	12.3%	26.5%	2.1%	15.3%
Families*	52.4%	15.2%	25.8%	1.0%	17.2%	22.1%
1 adult with child(ren)	11.7%	0.6%	1.2%	0.0%	0.9%	2.1%
2 adults with child(ren)	29.0%	2.9%	14.5%	0.8%	16.4%	12.3%
3 or more adults with child(ren)	11.7%	11.7%	10.1%	0.1%	0.0%	7.7%

Note: * One, two, three or more adults travelling with child(ren) indicate family travel parties in this result. **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

4-4. Age Composition

Figure 14: Composition of Age in NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties $N = 32,006$)



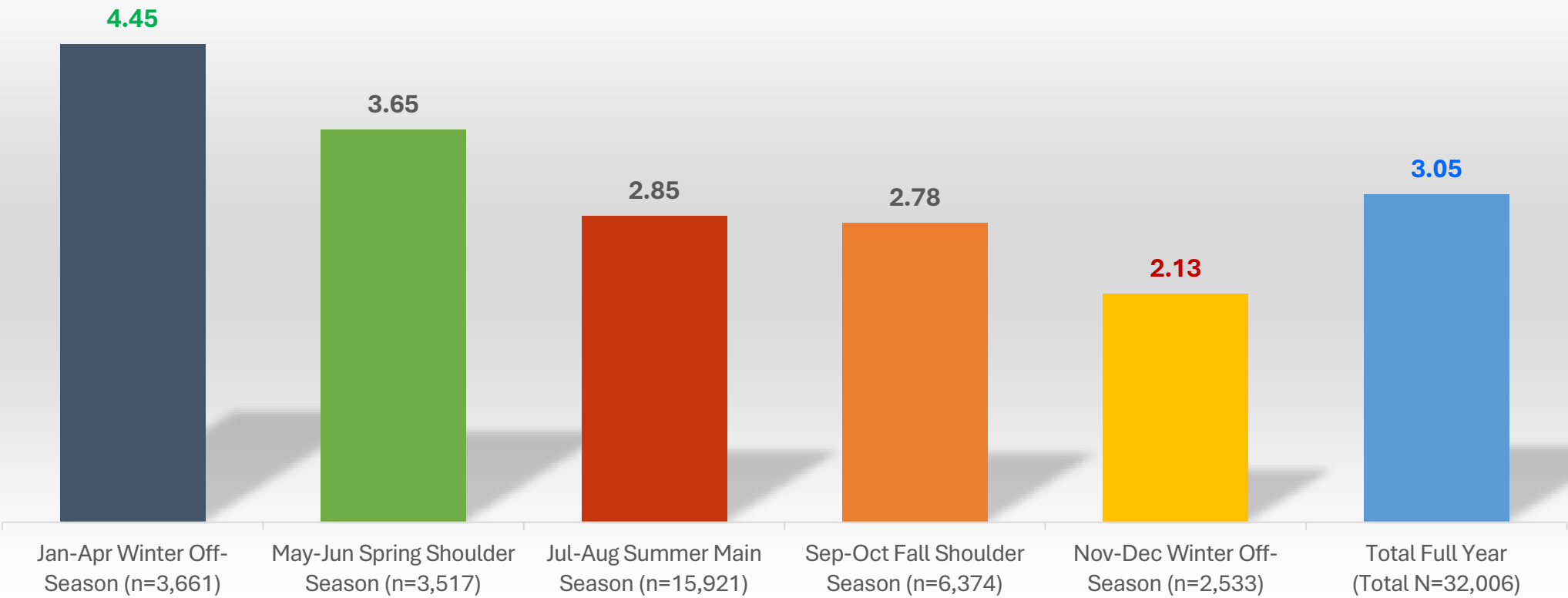
4-4. Age Composition (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Young Adult (18 to 34) Travellers	12.6%	3.7%	3.4%	2.4%	8.4%	4.7%
Middle Aged (35 to 54) Travellers	3.1%	5.9%	11.0%	16.3%	0.0%	9.7%
Senior (55 and over) Travellers	19.9%	57.6%	47.0%	57.6%	54.6%	47.8%
Multi-generation Adult Travellers	12.0%	17.7%	12.7%	22.7%	19.7%	15.7%
Adults with Child(ren) / Families	52.4%	15.2%	25.8%	1.0%	17.3%	22.1%

Note: * One, two, three or more adults travelling with child(ren) indicate family travel parties in this result. **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

4-5. Travel Party Size

Figure 15: Average Travel Party Size for NCCD Overnight Pleasure Travel Parties by Season



Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.



4-5. Travel Party Size (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Average Travel Party Size	4.45	3.65	2.85	2.78	2.13	3.05
Average Number of Male Travellers	2.41	1.94	1.34	1.49	1.49	1.57
Average Number of Female Travellers	2.04	1.71	1.51	1.29	0.64	1.48
Average Number of Children Travellers	1.08	0.44	0.50	0.02	0.34	0.45
Average Number of Adult Travellers	3.37	3.21	2.35	2.77	1.79	2.60

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

4-6. Gender and Age of NCCD Individual Overnight Pleasure Travellers

Figure 16: Gender of NCCD Individual Overnight Pleasure Travellers (Total Travellers N = 97,651)

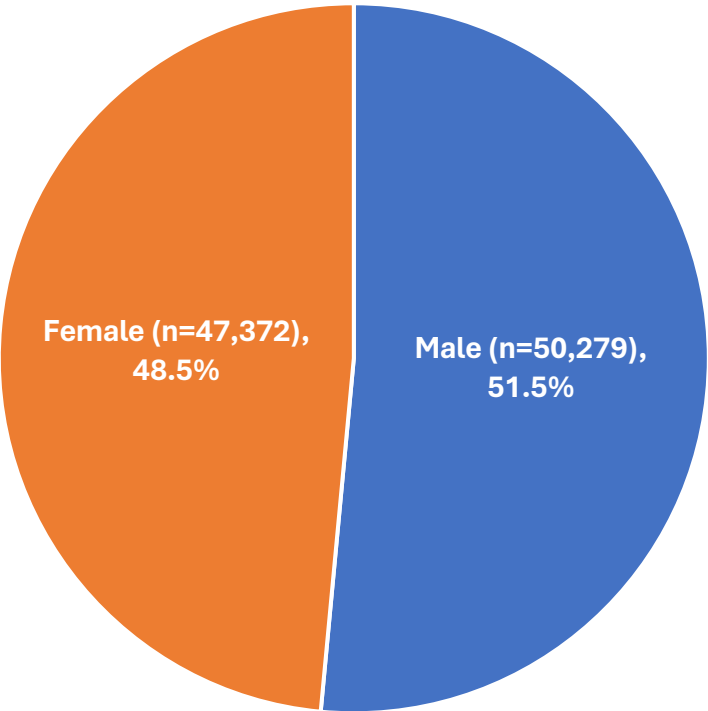
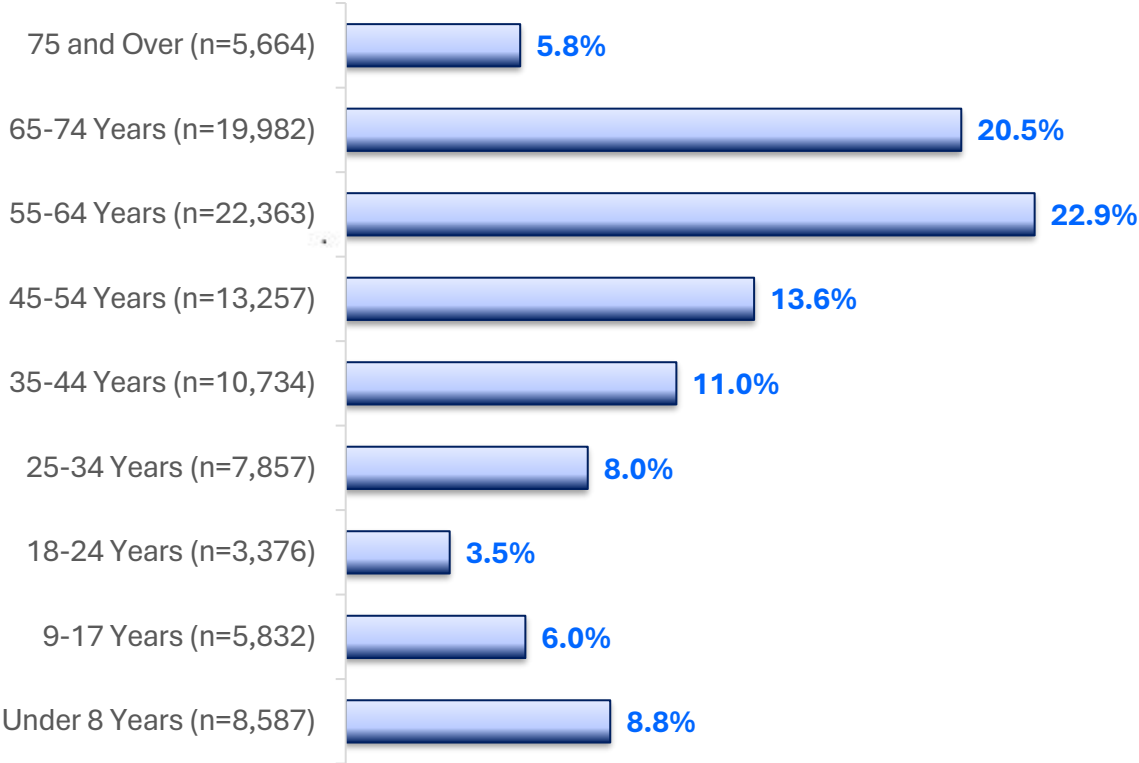


Figure 17: Age of NCCD Individual Overnight Pleasure Travellers (Total Travellers N = 97,651)

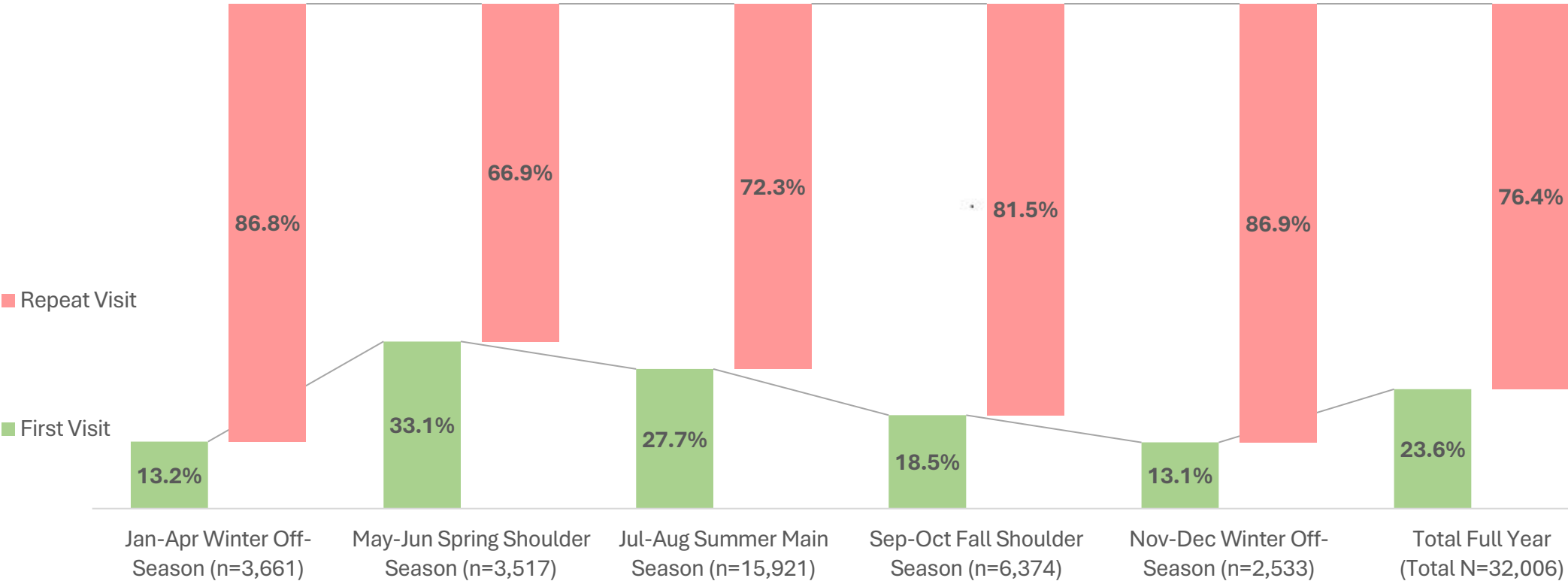


4-6. Gender and Age of NCCD Individual Overnight Pleasure Travellers (cont'd)

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Individual Overnight Pleasure Travellers N	16,278	12,837	45,408	17,745	5,383	97,651
(%)	(16.7%)	(13.1%)	(46.5%)	(18.2%)	(5.5%)	(100.0%)
Gender						
Male	54.1%	53.3%	47.0%	53.6%	70.1%	51.5%
Female	45.9%	46.7%	53.0%	46.4%	29.9%	48.5%
Age						
Under 8 Years	17.2%	9.4%	8.9%	0.5%	8.2%	8.8%
9-17 Years	7.0%	2.7%	8.6%	0.2%	7.6%	6.0%
18-24 Years	5.3%	1.3%	4.1%	1.4%	4.2%	3.5%
25-34 Years	17.4%	9.4%	5.7%	3.8%	10.2%	8.0%
35-44 Years	10.5%	3.4%	14.3%	4.6%	23.7%	11.0%
45-54 Years	18.1%	9.1%	13.6%	16.3%	1.0%	13.6%
55-64 Years	18.6%	36.8%	21.0%	23.7%	16.1%	22.9%
65-74 Years	5.8%	24.4%	16.8%	39.3%	24.6%	20.5%
75 and Over	0.1%	3.3%	7.0%	10.3%	4.3%	5.8%

4-7. Type of Visitation

Figure 18: Type of Visitation for NCCD Overnight Pleasure Travel Parties by Season



4-7. Type of Visitation (cont'd)

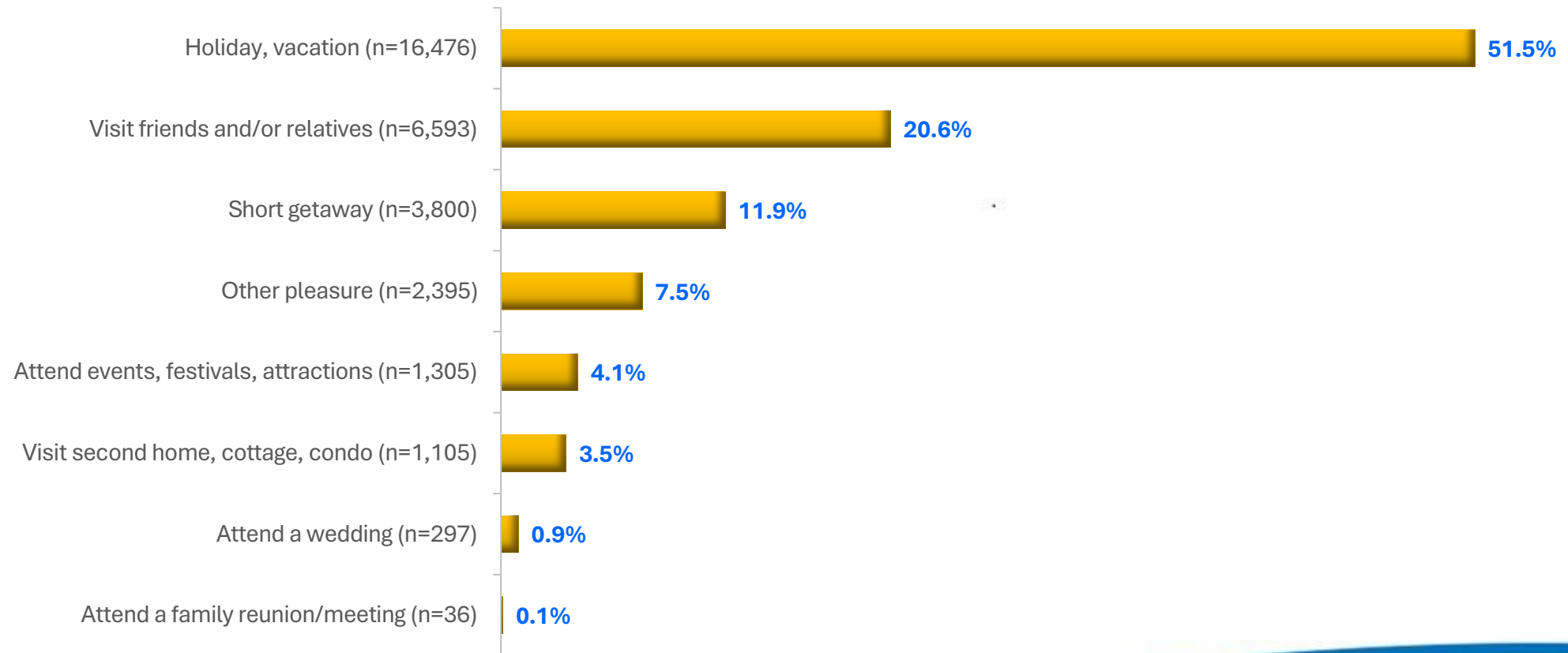
	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Type of Visitation						
First-timers	13.2%	33.1%	27.7%	18.5%	13.1%	23.6%
Repeaters	86.8%	66.9%	72.3%	81.5%	86.9%	76.4%
Return Visit Pattern	3,176 (13.0%)	2,352 (9.6%)	11,518 (47.1%)	5,193 (21.2%)	2,201 (9.0%)	24,440 (100.0%)
This year (2023)	55.6%	2.1%	19.4%	28.9%	71.4%	29.1%
One year ago (2022)	8.9%	24.1%	29.2%	31.1%	0.9%	24.0%
Two years ago (2021)	13.5%	0.7%	6.3%	0.0%	0.0%	4.8%
Three years ago (2020)	0.0%	2.3%	0.3%	7.1%	0.0%	1.9%
Four years ago (2019)	0.0%	27.3%	9.9%	4.4%	0.2%	8.2%
Five or more years ago (2018 & earlier)	21.9%	43.5%	34.9%	28.5%	27.5%	32.0%
Average Number of Times visited PEI in the Past Five Years (Grouped Median)	6.16 (5.26)	2.27 (1.97)	3.37 (2.55)	5.69 (4.11)	7.17 (7.01)	4.46 (3.12)

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

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5-1. Primary Reason for the Trip

Figure 12: Primary Reason for the Trip to PEI by NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties N = 32,006)



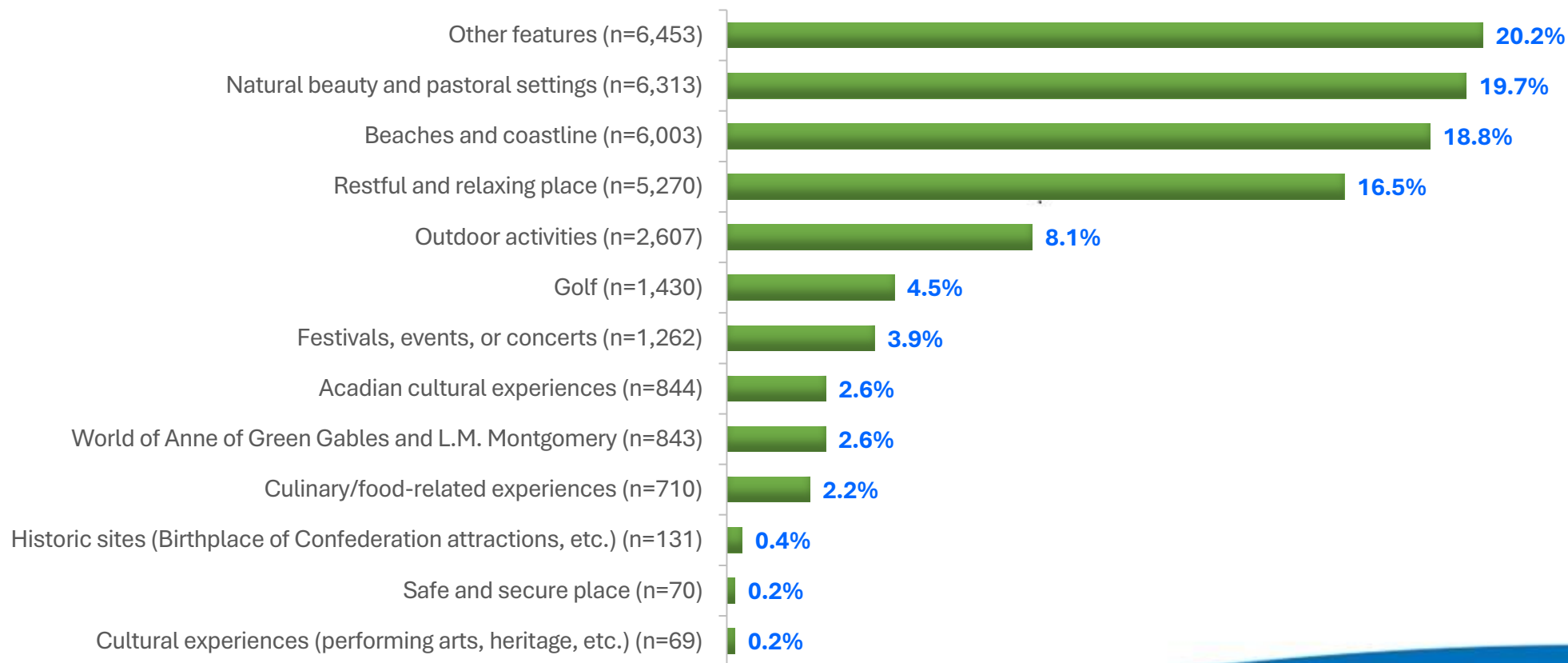
5-1. Primary Reason for the Trip (cont'd)

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Holiday, vacation	40.2%	61.6%	52.8%	49.4%	50.6%	51.5%
Visit friends and/or relatives	43.8%	19.7%	16.3%	7.8%	47.8%	20.6%
Short getaway	0.6%	4.0%	14.9%	19.7%	0.2%	11.9%
Other pleasure	15.5%	11.2%	4.8%	10.0%	1.1%	7.5%
Attend events, festivals, attractions	0.0%	0.6%	7.1%	2.5%	0.0%	4.1%
Visit second home, cottage, condo	0.0%	2.4%	3.2%	7.9%	0.0%	3.4%
Attend a wedding	0.0%	0.5%	0.7%	2.7%	0.0%	0.9%
Attend a family reunion/meeting	0.0%	0.0%	0.2%	0.0%	0.2%	0.1%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

5-2. Primary Features that Attracted

Figure 13: Primary Features that Attracted Overnight Pleasure Travel Parties to PEI
(Total Overnight Pleasure Parties N = 32,006)



5-2. Primary Features that Attracted (cont'd)

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Other features	32.7%	18.0%	13.1%	22.9%	42.6%	20.2%
Natural beauty and pastoral settings	19.5%	31.8%	19.8%	19.8%	2.4%	19.7%
Beaches and coastline	0.7%	14.3%	26.9%	11.3%	18.8%	18.8%
Restful and relaxing place	25.7%	6.5%	16.0%	12.9%	29.2%	16.5%
Outdoor activities	21.2%	8.0%	6.2%	6.9%	5.1%	8.1%
Golf	0.0%	2.9%	2.7%	14.1%	0.0%	4.5%
Festivals, events, or concerts	0.0%	9.3%	5.8%	0.1%	0.0%	3.9%
Acadian cultural experiences	0.0%	0.5%	2.7%	6.0%	0.5%	2.6%
World of Anne of Green Gables and L.M. Montgomery	0.0%	4.9%	3.2%	2.6%	0.0%	2.6%
Culinary/food-related experiences	0.3%	2.0%	2.9%	2.4%	0.2%	2.2%
Historic sites	0.0%	0.5%	0.3%	0.9%	0.2%	0.4%
Safe and secure place	0.0%	0.5%	0.2%	0.0%	0.9%	0.2%
Cultural experiences	0.0%	0.7%	0.3%	0.0%	0.0%	0.2%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

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6-1. Entry and Exit Points

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Entry Point						
Charlottetown Airport	4.1%	10.7%	7.0%	8.1%	6.6%	7.3%
Confederation Bridge	95.9%	86.9%	85.8%	86.8%	91.6%	87.7%
Wood Islands Ferry Terminal	0.0%	2.4%	7.1%	5.1%	1.9%	5.0%
Exit Point						
Charlottetown Airport	5.0%	10.9%	7.8%	8.1%	7.7%	7.9%
Confederation Bridge	95.0%	81.3%	84.0%	88.7%	88.1%	86.2%
Wood Islands Ferry Terminal	0.0%	7.8%	8.2%	3.2%	4.2%	5.9%
Mix of Entry and Exit Points						
Air only	4.1%	10.7%	6.5%	7.3%	6.6%	6.8%
Bridge only	95.0%	79.2%	78.9%	83.0%	87.6%	82.3%
Ferry only	0.0%	0.3%	2.2%	0.1%	1.3%	1.3%
Bridge and Ferry Mix	0.0%	9.5%	10.5%	7.9%	3.4%	8.1%
Air and Bridge or Ferry Mix	0.9%	0.3%	1.9%	1.7%	1.1%	1.5%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

6-2. Rental Vehicle Usage and Location of the Vehicle Pick-Up

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Rental Vehicle Usage						
Yes	1.1%	15.0%	9.4%	9.1%	2.2%	8.5%
No	98.9%	85.0%	90.6%	90.9%	97.8%	91.5%
Location of the Vehicle Pick-Up	42 (1.6%)	527 (19.5%)	1,501 (55.4%)	583 (21.5%)	56 (2.1%)	2,709 (100.0%)
Prince Edward Island	100.0%	31.4%	37.7%	46.3%	80.4%	40.2%
New Brunswick	0.0%	6.3%	2.5%	2.7%	19.6%	3.6%
Nova Scotia	0.0%	49.4%	39.9%	42.2%	0.0%	40.8%
Quebec	0.0%	0.0%	6.1%	0.9%	0.0%	3.5%
Ontario	0.0%	2.1%	7.8%	5.3%	0.0%	5.9%
Other Canadian provinces	0.0%	2.1%	0.0%	0.0%	0.0%	0.4%
New England states	0.0%	6.8%	2.1%	1.7%	0.0%	2.9%
Other US states	0.0%	1.9%	3.9%	0.9%	0.0%	2.7%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

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7-1. Primary Destination of the Trip

Figure 14: Primary Destination of the Trip by NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties N = 32,006)



	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Prince Edward Island	98.1%	77.4%	84.8%	83.3%	90.4%	85.7%
Other Destination	1.9%	21.0%	14.8%	10.9%	8.2%	12.7%
Don't Know/Not Stated	0.0%	1.5%	0.4%	5.8%	1.3%	1.6%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

7-2. Trip Duration

	Jan-Apr Winter Off- Season		May-Jun Spring Shoulder Season		Jul-Aug Summer Main Season		Sep-Oct Fall Shoulder Season		Nov-Dec Winter Off- Season		Total Full-Year	
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)		3,517 (11.0%)		15,921 (49.7%)		6,374 (19.9%)		2,533 (7.9%)		32,006 (100.0%)	
Average Trip Duration	<i>Nights</i>	%	<i>Nights</i>	%	<i>Nights</i>	%	<i>Nights</i>	%	<i>Nights</i>	%	<i>Nights</i>	%
Total Nights of the Trip	5.02	100.0%	12.58	100.0%	11.02	100.0%	9.21	100.0%	7.00	100.0%	9.83	100.0%
Nights stayed in Prince Edward Island	2.69	53.5%	5.92	47.0%	6.72	60.9%	5.41	58.8%	4.90	70.0%	5.77	58.7%
Nights in paid accommodations in PEI	(1.03)	(38.3%)	(4.70)	(79.4%)	(4.84)	(72.0%)	(3.75)	(69.3%)	(1.76)	(36.0%)	(3.93)	(68.1%)
Nights in paid accommodations in PEI through a peer-to-peer lodging website such as Airbnb, VRBO, etc.	(0.19)	(6.9%)	(1.18)	(19.9%)	(1.31)	(19.5%)	(0.99)	(18.2%)	(1.09)	(22.3%)	(1.09)	(18.8%)
Nights stayed in New Brunswick	0.23	4.6%	1.60	12.7%	1.29	11.7%	0.91	9.8%	0.99	14.1%	1.10	11.2%
Nights stayed in Nova Scotia	0.47	9.4%	2.49	19.8%	1.33	12.1%	1.32	14.3%	0.05	0.7%	1.26	12.8%
Nights stayed in Newfoundland and Labrador	0.46	9.2%	0.81	6.4%	0.38	3.4%	0.10	1.1%	0.04	0.5%	0.35	3.6%
Nights stayed in Magdalen Islands	0.00	0.0%	0.57	4.5%	0.16	1.5%	0.39	4.3%	0.37	5.3%	0.25	2.5%
Nights stayed elsewhere	1.17	23.3%	1.19	9.5%	1.14	10.3%	1.08	11.8%	0.66	9.4%	1.10	11.2%

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; Percentage in parentheses indicate the proportion of average nights stayed in PEI in each segment.

7-3. Overnight Stays in PEI Region

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Total Accumulated Parties Staying at Least One Night in the Specific Region *						
North Cape Coastal Drive	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Greater Charlottetown Area	2.8%	26.4%	27.8%	18.8%	21.7%	22.5%
Points East Coastal Drive	1.9%	23.0%	24.6%	19.9%	22.5%	20.7%
Green Gables Shore	1.9%	32.1%	23.8%	16.0%	21.1%	20.5%
Summerside Area	11.7%	13.7%	14.2%	11.0%	20.3%	13.7%
Red Sands Shore	0.0%	8.4%	6.6%	8.9%	20.4%	7.6%
Total Overnight Stays (Parties)	4,327	7,160	31,360	11,131	5,220	59,198
(%)	(7.3%)	(12.1%)	(53.0%)	(18.8%)	(8.8%)	(100.0%)

Note: * Results were based on multiple responses.

7-3. Overnight Stays in PEI Region (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Total Accumulated Nights Spent by Parties in the Specific Region *						
North Cape Coastal Drive	88.8%	59.4%	63.3%	64.8%	70.8%	65.0%
Points East Coastal Drive	2.8%	9.1%	9.7%	10.7%	7.8%	9.3%
Greater Charlottetown Area	2.1%	10.1%	10.1%	9.2%	7.2%	9.3%
Green Gables Shore	2.1%	14.4%	9.8%	8.0%	4.7%	9.2%
Summerside Area	4.4%	4.3%	4.6%	4.1%	4.2%	4.4%
Red Sands Shore	0.0%	2.7%	2.6%	3.3%	5.4%	2.8%
Total Overnight Stays (Nights)	9,845	20,824	106,866	34,457	12,419	184,411
(%)	(5.3%)	(11.3%)	(57.9%)	(18.7%)	(6.7%)	(100.0%)

Note: * Results were based on multiple responses.

7-4. Average Length of Stay in PEI Region

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Average Number of Nights Stayed in PEI	2.69	5.92	6.72	5.41	4.90	5.77
Average Number of Nights Spent in Each Region (For All Visitors Regardless of Each Region Stayed)						
North Cape Coastal Drive	2.39	3.51	4.25	3.51	3.47	3.75
Points East Coastal Drive	0.07	0.54	0.65	0.58	0.38	0.54
Greater Charlottetown Area	0.06	0.60	0.68	0.50	0.35	0.54
Green Gables Shore	0.06	0.85	0.66	0.43	0.23	0.53
Summerside Area	0.12	0.25	0.31	0.22	0.21	0.25
Red Sands Shore	0.00	0.16	0.17	0.18	0.26	0.16
Average Number of Nights Spent in Each Region (For Only Those Who Stayed in the Region)						
North Cape Coastal Drive	2.39	3.51	4.25	3.51	3.47	3.75
Points East Coastal Drive	4.00	2.34	2.67	2.90	1.68	2.60
Green Gables Shore	3.00	2.65	2.76	2.70	1.08	2.59
Greater Charlottetown Area	2.00	2.27	2.43	2.64	1.63	2.38
Red Sands Shore	n/a	1.91	2.63	2.00	1.30	2.11
Summerside Area	1.00	1.86	2.17	2.00	1.02	1.86

Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

7-5. Overnight Stays in Type of Accommodation

	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Total Accumulated Parties Staying at Least One Night in the Specific Type of Accommodation *						
Home of Friends or Relatives	64.5%	16.1%	24.8%	19.4%	71.9%	31.0%
Hotel, Motel, or Resort	33.7%	29.8%	23.8%	37.2%	15.0%	27.6%
Campground/Trailer (RV) Park	0.0%	25.1%	33.1%	18.9%	13.9%	24.1%
Cottage or Cabin	0.0%	24.0%	22.8%	15.1%	9.8%	17.8%
B&B or Tourist Home	1.9%	18.7%	7.6%	5.7%	0.3%	7.2%
Inn	0.0%	11.9%	6.0%	4.1%	0.0%	5.1%
Own Property	0.0%	2.3%	3.2%	13.0%	1.3%	4.5%
Other (e.g., hostel)	0.0%	0.2%	3.1%	2.5%	0.0%	2.1%
Total Overnight Stays (Parties)	3,661	4,503	19,818	7,388	2,843	38,213
(%)	(9.6%)	(11.8%)	(51.9%)	(19.3%)	(7.4%)	(100.0%)

Note: * Results were based on multiple responses.

7-5. Overnight Stays in Type of Accommodation (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Total Accumulated Nights Staying at Least One Night in the Specific Type of Accommodation *						
Campground/Trailer (RV) Park	0.0%	27.8%	30.7%	27.7%	12.1%	27.0%
Home of Friends or Relatives	61.3%	9.8%	16.1%	16.9%	53.0%	20.4%
Cottage or Cabin	0.0%	20.2%	22.8%	18.9%	12.6%	19.9%
Hotel, Motel, or Resort	31.8%	21.3%	15.4%	20.9%	20.4%	18.3%
Own Property	0.0%	6.7%	5.5%	8.0%	1.9%	5.6%
B&B or Tourist Home	6.9%	7.2%	4.2%	3.7%	0.1%	4.3%
Inn	0.0%	6.9%	3.4%	2.5%	0.0%	3.2%
Other (e.g., hostel)	0.0%	0.0%	1.9%	1.4%	0.0%	1.4%
Total Overnight Stays (Nights)	9,845	20,824	106,866	34,457	12,419	184,411
(%)	(5.3%)	(11.3%)	(57.9%)	(18.7%)	(6.7%)	(100.0%)

Note: * Results were based on multiple responses.

7-6. Average Length of Stay in Type of Accommodation

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Average Number of Nights Stayed in PEI	2.69	5.92	6.72	5.41	4.90	5.77
Average Number of Nights Spent in Each Type of Accommodation (For All Visitors Regardless of Each Accommodation Used)						
Campground/Trailer (RV) Park	0.00	1.65	2.06	1.50	0.59	1.55
Home of Friends or Relatives	1.65	0.58	1.08	0.92	2.60	1.18
Cottage or Cabin	0.00	1.20	1.53	1.03	0.62	1.15
Hotel, Motel, or Resort	0.85	1.26	1.04	1.13	1.00	1.06
Own Property	0.00	0.39	0.37	0.43	0.09	0.32
B&B or Tourist Home	0.19	0.43	0.28	0.20	0.01	0.25
Inn	0.00	0.41	0.23	0.14	0.00	0.18
Other (e.g., hostel)	0.00	0.00	0.13	0.07	0.00	0.08
Average Number of Nights Spent in Each Type of Accommodation (For Only Those Who Stayed in Each Accommodation Type)						
Own Property	n/a	17.28	11.71	3.32	7.00	7.11
Cottage or Cabin	n/a	4.99	6.71	6.79	6.28	6.45
Campground/Trailer (RV) Park	n/a	6.55	6.24	7.91	4.24	6.45
Hotel, Motel, or Resort	2.54	4.24	4.35	3.03	6.68	3.83
Other (e.g., hostel)	n/a	1.00	4.12	2.92	n/a	3.81
Home of Friends or Relatives	2.56	3.61	4.34	4.73	3.61	3.79
Inn	n/a	3.42	3.77	3.33	n/a	3.61
B&B or Tourist Home	10.00	2.29	3.68	3.52	2.00	3.44

Note: Results were based on multiple responses. **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

7-7. Other PEI Regions Visited by NCCD Overnight Pleasure Travel Parties

Figure 15: Other PEI Regions Visited by NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Parties N = 32,006)



	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Summerside Area	34.8%	56.6%	59.3%	40.5%	46.0%	51.4%
Green Gables Shore	19.3%	78.0%	57.9%	42.1%	28.5%	50.2%
Greater Charlottetown Area	21.5%	60.8%	55.2%	43.9%	31.8%	47.8%
Points East Coastal Drive	12.9%	55.9%	36.3%	38.0%	24.2%	35.2%
Red Sands Shore	17.7%	40.6%	33.6%	32.5%	27.9%	31.9%

Note: Results were based on multiple responses. A “visit” was defined as dining, visiting an attraction, or participating in an activity in the region, and not travelling through the region only; **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.



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8-1. Activities Participated in While in PEI

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Driving tour (scenic drives/views)	39.9%	88.6%	63.8%	68.6%	41.9%	63.0%
Going to a beach	23.0%	81.9%	73.1%	52.2%	29.7%	60.7%
Going to a full-service restaurant	50.8%	76.9%	59.2%	59.3%	38.3%	58.6%
Seeing natural wonders	19.2%	68.4%	53.3%	56.4%	30.4%	49.8%
Sampling local culinary products	21.2%	71.1%	61.0%	36.1%	9.6%	48.5%
Sightseeing, appreciating pastoral or rural settings	20.1%	80.5%	53.6%	43.0%	19.0%	47.9%
Visiting a national or provincial park	0.2%	76.5%	52.1%	42.6%	22.0%	44.6%
Shopping for general merchandise	31.3%	42.8%	50.7%	35.3%	48.3%	44.3%
Shopping for local products	8.7%	53.4%	56.9%	27.8%	36.2%	43.6%
Visiting friends and/or relatives	52.9%	30.1%	42.2%	27.2%	67.1%	41.1%
Visiting historic/heritage sites, or cultural attractions	5.6%	54.2%	40.4%	31.9%	19.9%	34.6%
Visiting Anne of Green Gables and related attractions	0.0%	36.2%	25.3%	26.0%	12.1%	22.7%
Going to a museum or art gallery	1.9%	39.0%	26.7%	20.8%	1.9%	22.1%
Using the Confederation Trail or other trails	1.2%	34.8%	22.0%	18.4%	13.9%	19.7%
Participating in nature-based outdoor activities	5.4%	27.4%	19.1%	8.7%	2.4%	15.1%

Note: Results were based on multiple responses. **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

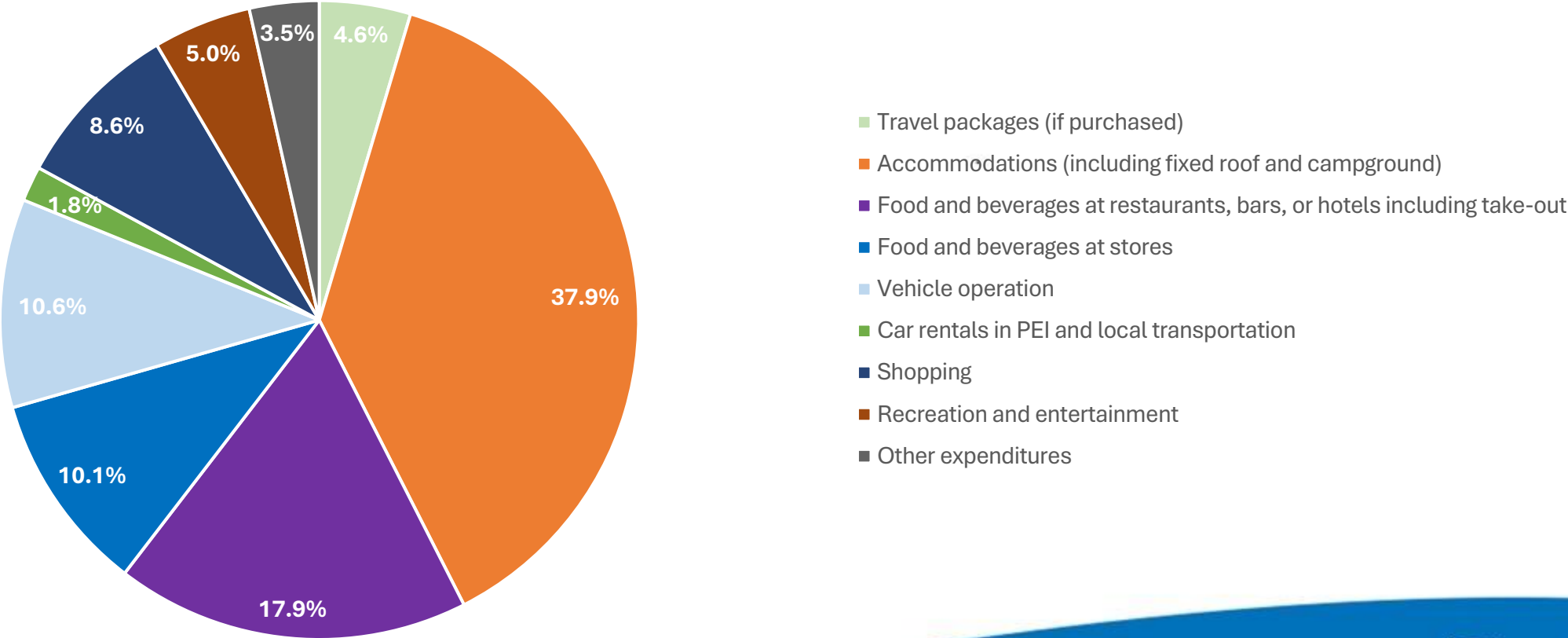
8-1. Activities Participated in While in PEI (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Attending a live performance/entertainment	2.5%	14.7%	15.8%	8.0%	1.6%	11.5%
Participating in water-based activities	0.0%	4.6%	19.9%	4.7%	0.0%	11.4%
Attending a festival, event, or concert	3.1%	8.2%	13.8%	13.1%	3.0%	11.0%
Other	11.7%	3.0%	8.7%	19.5%	8.4%	10.5%
Playing golf (not miniature)	2.2%	13.4%	8.1%	16.4%	0.0%	9.0%
Taking part in an authentic PEI experience/hands-on learning activity	0.9%	13.0%	9.0%	3.6%	0.4%	6.8%
Participating in recreational fishing or hunting	0.0%	0.5%	9.3%	1.9%	0.0%	5.0%
Visiting a theme, fun or amusement park	2.7%	2.3%	7.7%	2.1%	0.0%	4.8%
Experiencing night-life activities (bars, nightclubs, etc.)	0.3%	6.1%	4.8%	8.2%	0.4%	4.7%
Participating in recreational motorized activities	0.6%	2.6%	4.8%	0.9%	16.4%	4.2%
Health and wellness activities (yoga, spa, sauna, etc.)	14.6%	2.9%	1.3%	5.8%	0.8%	3.9%
Participating in cold-weather activities	33.2%	0.0%	0.0%	0.0%	0.2%	3.8%
Attending a sports event or tournament	0.3%	0.0%	1.1%	1.5%	32.2%	3.4%
Going to a casino/racino	0.6%	1.7%	0.3%	0.7%	0.0%	0.6%

Note: Results were based on multiple responses; **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

8-2. Estimated Total Direct Expenditures

Figure 16: Breakdown of Tourism Expenditures by NCCD Overnight Pleasure Travel Parties
(Total Overnight Pleasure Travel Parties N = 32,006 or Total Overnight Pleasure Travellers N= 97,651)



8-2. Estimated Total Direct Expenditures (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Estimated Total Direct Expenditures (\$)	\$4,343,981	\$8,828,208	\$38,522,762	\$12,482,074	\$3,345,275	\$67,522,300
Travel packages (if purchased)	\$207,506	\$411,613	\$1,543,903	\$834,610	\$121,106	\$3,118,739
Accommodations	\$1,931,575	\$3,390,653	\$14,790,625	\$4,481,189	\$991,798	\$25,585,840
Food and beverages at restaurants, bars, or hotels	\$903,203	\$1,533,435	\$6,671,982	\$2,183,520	\$812,043	\$12,104,184
Food and beverages at stores	\$324,065	\$752,587	\$4,002,133	\$1,439,214	\$329,525	\$6,847,523
Vehicle operation	\$277,882	\$768,857	\$4,236,214	\$1,478,089	\$366,649	\$7,127,691
Car rentals in PEI and local transportation	\$49,717	\$121,859	\$738,177	\$273,872	\$12,615	\$1,196,241
Shopping	\$281,562	\$778,569	\$3,343,316	\$758,026	\$645,243	\$5,806,716
Recreation and entertainment	\$244,820	\$315,412	\$2,170,667	\$573,781	\$47,656	\$3,352,336
Other expenditures	\$123,651	\$755,224	\$1,025,744	\$459,773	\$18,640	\$2,383,031

Note: Total expenditures in each season were calculated as follows: Number of overnight pleasure travel parties × average spending per party per visit or Number of overnight pleasure travellers × average length of stay × average spending per person per night.

8-2. Estimated Total Direct Expenditures (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
% of Estimated Total Direct Expenditures	(6.4%)	(13.1%)	(57.1%)	(18.5%)	(5.0%)	(100.0%)
Travel packages (if purchased)	4.8%	4.7%	4.0%	6.7%	3.6%	4.6%
Accommodations	44.5%	38.4%	38.4%	35.9%	29.6%	37.9%
Food and beverages at restaurants, bars, or hotels	20.8%	17.4%	17.3%	17.5%	24.3%	17.9%
Food and beverages at stores	7.5%	8.5%	10.4%	11.5%	9.9%	10.1%
Vehicle operation	6.4%	8.7%	11.0%	11.8%	11.0%	10.6%
Car rentals in PEI and local transportation	1.1%	1.4%	1.9%	2.2%	0.4%	1.8%
Shopping	6.5%	8.8%	8.7%	6.1%	19.3%	8.6%
Recreation and entertainment	5.6%	3.6%	5.6%	4.6%	1.4%	5.0%
Other expenditures	2.8%	8.6%	2.7%	3.7%	0.6%	3.5%

8-3. Average Spending per Party per Visit

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Average Spending per Party per Visit (\$)	\$1,186.52	\$2,510.15	\$2,419.64	\$1,958.33	\$1,320.71	\$2,151.93
Travel packages (if purchased)	\$56.68	\$117.03	\$96.97	\$130.94	\$47.81	\$99.57
Accommodations	\$527.59	\$964.07	\$929.01	\$703.06	\$391.56	\$810.80
Food and beverages at restaurants, bars, or hotels	\$246.70	\$436.01	\$419.07	\$342.58	\$320.59	\$386.55
Food and beverages at stores	\$88.52	\$213.98	\$251.38	\$225.80	\$130.10	\$218.93
Vehicle operation	\$75.90	\$218.61	\$266.08	\$231.90	\$144.75	\$228.40
Car rentals in PEI and local transportation	\$13.58	\$34.65	\$46.37	\$42.97	\$4.98	\$37.93
Shopping	\$76.91	\$221.37	\$210.00	\$118.93	\$254.74	\$188.16
Recreation and entertainment	\$66.87	\$89.68	\$136.34	\$90.02	\$18.81	\$105.27
Other expenditures	\$33.77	\$214.73	\$64.43	\$72.13	\$7.36	\$76.31
Average Length of Stay (nights)	2.69	5.92	6.72	5.41	4.90	5.77
Average Party Size (persons)	4.45	3.65	2.85	2.78	2.13	3.05
Estimated Number of Overnight Pleasure Travellers	16,278	12,837	45,408	17,745	5,383	97,651

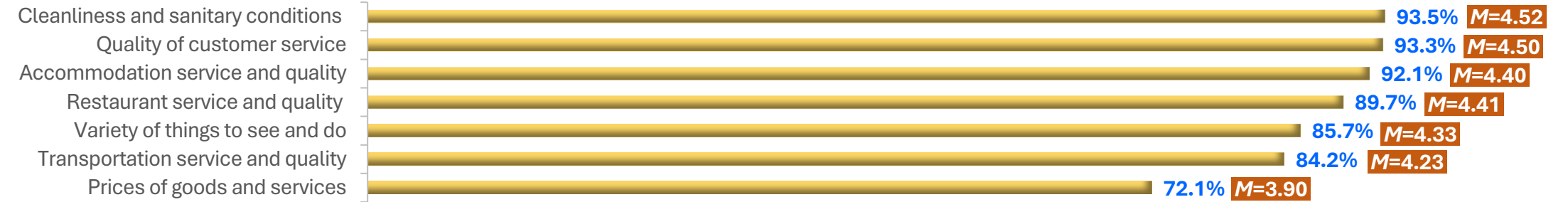
8-4. Average Spending per Person per Night

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Average Spending per Person per Visit (\$)	\$99.28	\$116.22	\$126.27	\$130.01	\$126.79	\$122.34
Travel packages (if purchased)	\$4.74	\$5.42	\$5.06	\$8.69	\$4.59	\$5.66
Accommodations	\$44.14	\$44.64	\$48.48	\$46.68	\$37.59	\$46.09
Food and beverages at restaurants, bars, or hotels	\$20.64	\$20.19	\$21.87	\$22.74	\$30.78	\$21.98
Food and beverages at stores	\$7.41	\$9.91	\$13.12	\$14.99	\$12.49	\$12.45
Vehicle operation	\$6.35	\$10.12	\$13.89	\$15.40	\$13.90	\$12.99
Car rentals in PEI and local transportation	\$1.14	\$1.60	\$2.42	\$2.85	\$0.48	\$2.16
Shopping	\$6.43	\$10.25	\$10.96	\$7.90	\$24.46	\$10.70
Recreation and entertainment	\$5.60	\$4.15	\$7.11	\$5.98	\$1.81	\$5.98
Other expenditures	\$2.83	\$9.94	\$3.36	\$4.79	\$0.71	\$4.34
Average Length of Stay (nights)	2.69	5.92	6.72	5.41	4.90	5.77
Average Party Size (persons)	4.45	3.65	2.85	2.78	2.13	3.05
Estimated Number of Overnight Pleasure Travellers	16,278	12,837	45,408	17,745	5,383	97,651

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9-1. Rating of Travel Services

Figure 17: Rating of Travel Services by NCCD Overnight Pleasure Travel Parties
(Total Overnight Travel Parties N = 32,006)

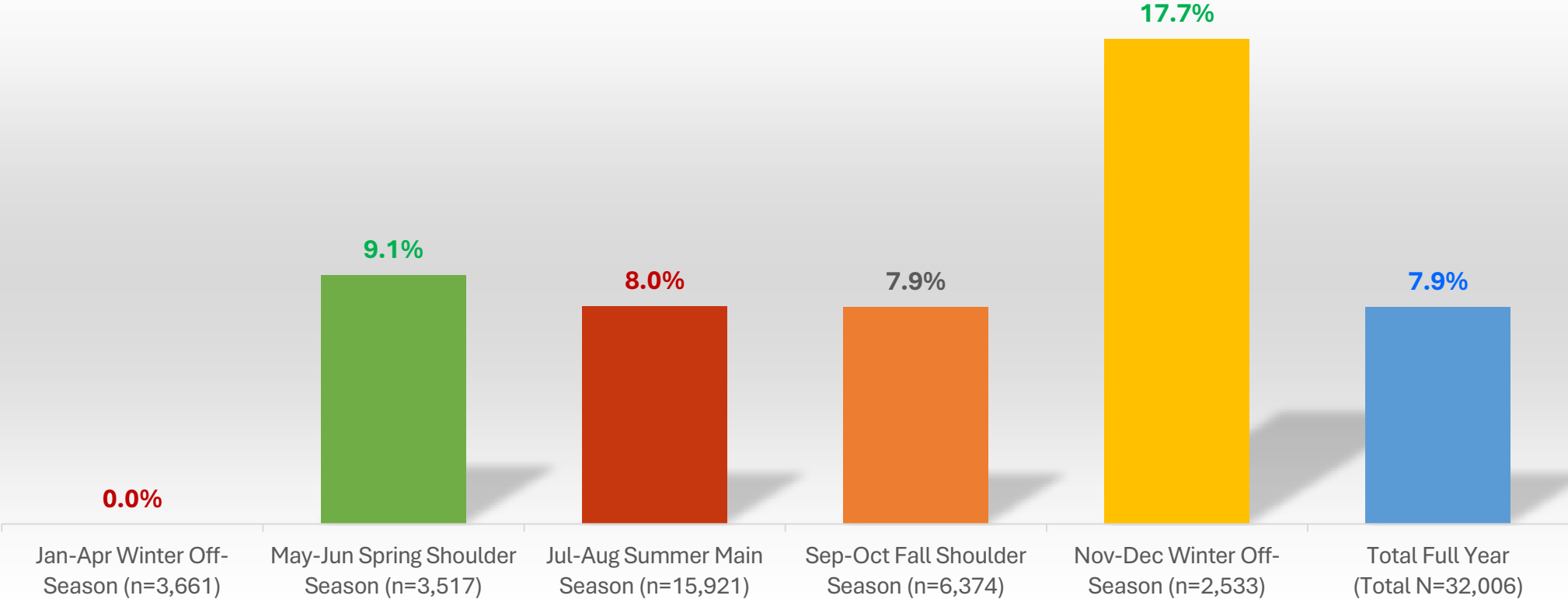


	Jan-Apr Winter Off-Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off-Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Cleanliness and sanitary conditions	100.0%	95.1%	94.6%	94.8%	69.5%	93.5%
Quality of customer service	99.7%	96.9%	92.2%	98.2%	69.0%	93.3%
Accommodation service and quality	100.0%	81.4%	91.1%	95.4%	100.0%	92.1%
Restaurant service and quality	86.5%	92.0%	92.6%	88.0%	74.9%	89.7%
Variety of things to see and do	99.3%	90.3%	90.4%	78.2%	39.1%	85.7%
Transportation service and quality	99.2%	87.5%	78.1%	91.9%	93.4%	84.2%
Prices of goods and services	77.3%	82.3%	71.9%	74.1%	42.0%	72.1%

Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale, M indicates mean values; **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

9-2. Instance of Complaints

Figure 18: Instance of Complaints from NCCD Overnight Pleasure Travel Parties by Season



Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

9-3. Travel Evaluation and Overall Satisfaction

Figure 19: Travel Evaluation and Overall Satisfaction by NCCD Overnight Pleasure Travel Parties
(Total Overnight Travel Parties N = 32,006)



	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
PEI was a safe and hygienic destination	100.0%	97.0%	95.7%	96.6%	82.0%	95.5%
I was satisfied with my trip to PEI	98.1%	95.1%	96.3%	96.0%	82.3%	95.3%
My trip to PEI was a good way to spend my time	99.7%	95.5%	96.4%	97.5%	73.6%	95.2%
My trip to PEI was good value for money spent	99.7%	91.3%	89.3%	95.9%	82.0%	91.4%

Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale, M indicates mean values; **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

9-4. Future Behavioural Intentions

Figure 20: Likelihood of Recommending PEI as a Travel Destination to Others by Season

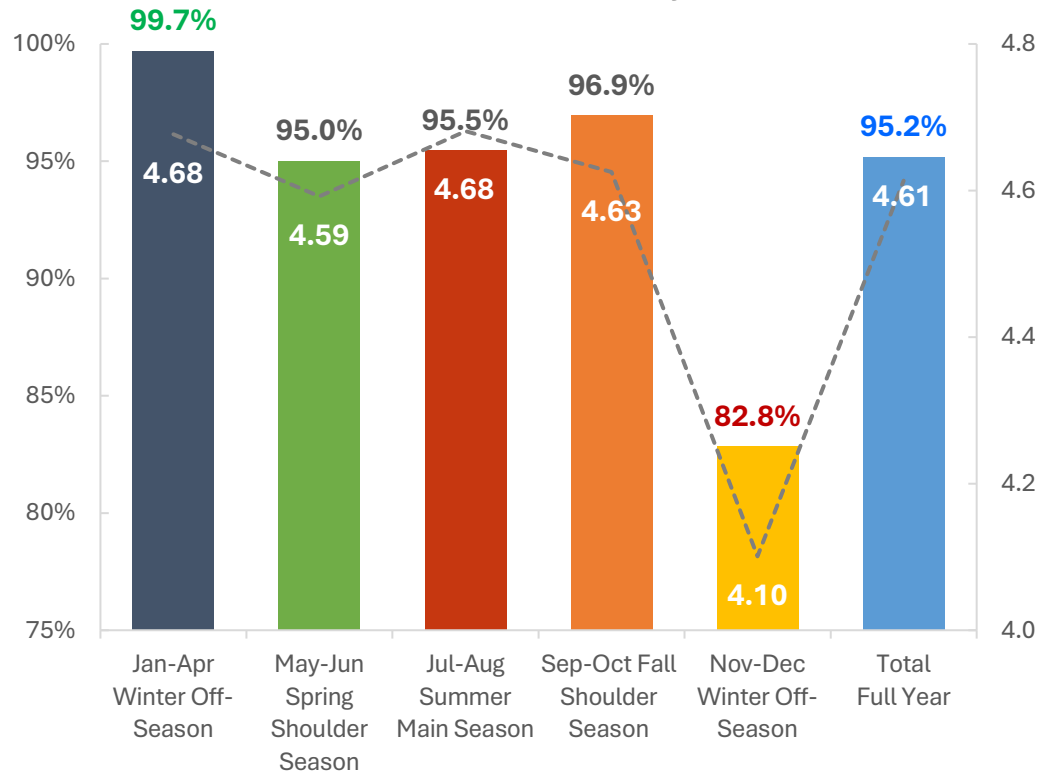
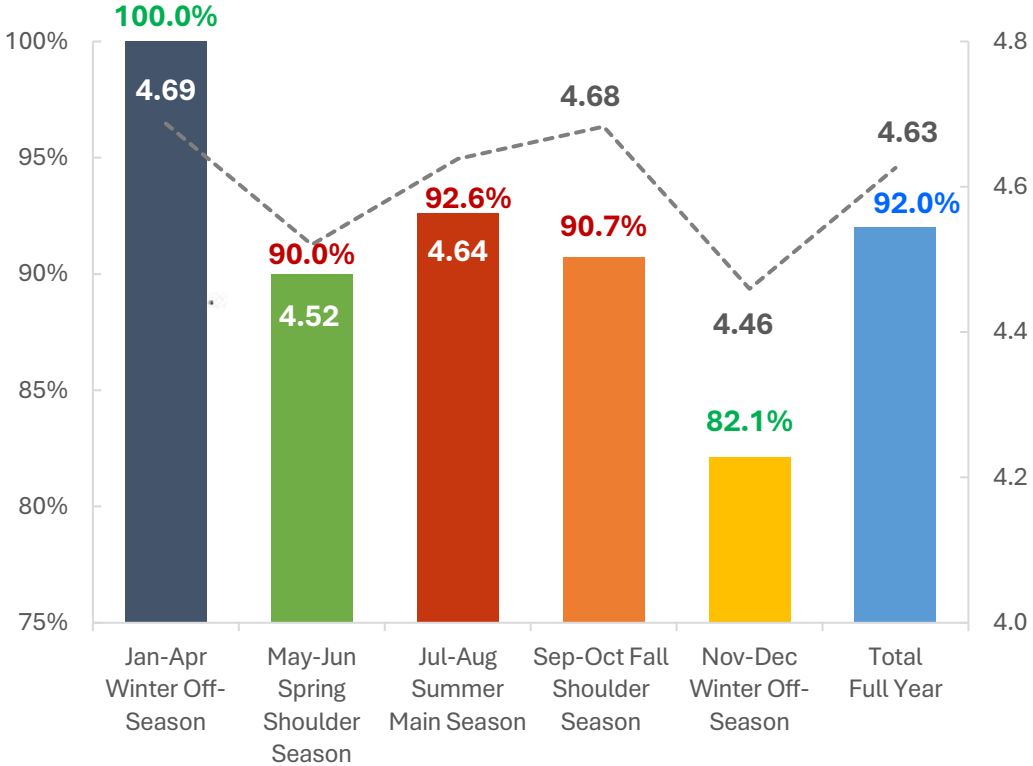


Figure 21: Likelihood of Visiting PEI Again by Season



Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale, numbers inside of each column indicate mean values; **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than other seasonal groups, while **Black Bold Numbers** position between the higher and lower groups, at 95% confidence level.

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10. Demographic Characteristics of Respondents

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Gender						
Male	44.3%	28.2%	36.8%	32.1%	49.3%	36.8%
Female	55.7%	71.8%	61.5%	67.9%	50.7%	62.4%
Other	n/a	n/a	1.7%	n/a	n/a	0.9%
Age						
18 to 24	12.0%	1.9%	1.5%	2.9%	7.4%	3.5%
25 to 34	17.4%	12.6%	6.0%	2.7%	19.6%	8.5%
35 to 44	12.3%	7.5%	17.4%	5.9%	16.6%	13.4%
45 to 54	14.9%	8.2%	14.0%	16.1%	1.3%	12.9%
55 to 64	32.2%	32.7%	30.7%	26.9%	17.3%	29.3%
65 to 74	10.8%	32.8%	22.0%	30.6%	37.7%	24.8%
75 and over	0.3%	4.3%	8.4%	14.8%	n/a	7.6%
Mother Tongue						
English	95.0%	75.9%	69.3%	79.6%	61.2%	74.4%
French	5.0%	22.6%	28.2%	17.9%	38.8%	23.7%
Other	n/a	1.5%	2.5%	2.5%	n/a	1.9%

10. Demographic Characteristics of Respondents (cont'd)

		Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties N (%)		3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Marital Status							
Single		13.4%	11.0%	14.4%	26.7%	27.1%	17.4%
Married/living common law		86.0%	77.7%	82.5%	66.7%	72.6%	78.4%
Other		0.6%	11.3%	3.2%	6.6%	0.2%	4.2%
Average Number of Children Living in the Household *							
Children 17 years and younger	Valid N	1,496	609	3,311	298	459	6,173
	(Valid %)	(40.9%)	(17.3%)	(20.8%)	(4.7%)	(18.1%)	(19.3%)
	Avg. #	2.07	1.46	1.77	1.53	1.97	1.82
Children 18 years and older	Valid N	756	861	2,946	449	447	5,459
	(Valid %)	(20.6%)	(24.5%)	(18.5%)	(7.0%)	(17.6%)	(17.1%)
	Avg. #	1.98	1.55	1.94	1.42	1.05	1.77

Note: * Results were based on respondents who reported the number of children and had at least one child living in the household. The average number of children living in the household was based on the valid number of respondents, excluding '0'.

10. Demographic Characteristics of Respondents (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Education						
Some school	0.3%	0.5%	2.7%	5.8%	n/a	2.6%
High school diploma	3.0%	5.7%	10.6%	5.5%	8.3%	8.0%
Some post-secondary	12.1%	6.0%	10.4%	19.1%	40.8%	14.2%
Graduated community/technical college	42.4%	21.9%	29.9%	24.9%	10.0%	27.9%
Graduated university (undergraduate)	29.1%	36.1%	24.9%	15.8%	20.3%	24.4%
Post graduate degree/Professional designation	13.1%	29.9%	21.5%	28.9%	20.7%	22.9%
Employment Status						
Working full time	61.4%	29.0%	45.1%	34.9%	48.4%	43.4%
Working part time or seasonally	7.8%	4.0%	4.3%	2.0%	9.1%	4.6%
Unemployed	n/a	2.0%	2.9%	0.1%	0.6%	1.7%
Retraining or upgrading	13.3%	60.9%	42.6%	62.2%	41.2%	45.1%
Retired	n/a	n/a	n/a	n/a	n/a	n/a
Homemaker	n/a	2.0%	0.9%	0.6%	0.4%	0.8%
Student	12.0%	0.6%	2.7%	0.3%	0.2%	2.9%
Other	5.4%	1.5%	1.5%	n/a	n/a	1.5%

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

10. Demographic Characteristics of Respondents (cont'd)

	Jan-Apr Winter Off- Season	May-Jun Spring Shoulder Season	Jul-Aug Summer Main Season	Sep-Oct Fall Shoulder Season	Nov-Dec Winter Off- Season	Total Full-Year
Overnight Pleasure Parties <i>N</i> (%)	3,661 (11.4%)	3,517 (11.0%)	15,921 (49.7%)	6,374 (19.9%)	2,533 (7.9%)	32,006 (100.0%)
Annual Household Income						
Under \$40,000	13.6%	3.8%	9.9%	5.4%	23.6%	9.9%
\$40,000 to \$59,999	0.6%	16.4%	7.9%	25.4%	7.7%	11.5%
\$60,000 to \$79,999	15.8%	10.3%	12.9%	16.1%	1.4%	12.7%
\$80,000 to \$99,999	24.0%	16.8%	12.2%	12.5%	6.7%	13.7%
\$100,000 to \$124,999	8.4%	14.6%	11.4%	10.7%	18.3%	11.8%
\$125,000 to \$149,999	0.8%	7.8%	13.1%	13.1%	17.1%	11.4%
\$150,000 to \$174,999	16.4%	12.5%	7.2%	4.7%	16.1%	9.1%
\$175,000 to \$199,999	0.6%	4.7%	5.3%	2.3%	0.2%	3.7%
\$200,000 or more	7.6%	6.7%	10.9%	3.4%	0.7%	7.8%
Not Stated	12.2%	6.3%	9.1%	6.4%	8.1%	8.5%