
A PROFILE OF MOTOR COACH VISITORS

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Atlantic Canada
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EXECUTIVE SUMMARY

This report presents the findings from the 2007 Travel Survey of Motor Coach Visitors conducted from June to December 2007 by the Tourism Research Centre. Over this period, motor coach visitors completed a total of 416 surveys, and these were analyzed for the purposes of this report. The vast majority (94.7%) of motor coach passengers completing the survey were from the United States. Based on anecdotal comments from hotel operators and from Tourism PEI, it appears that most motor coach visitors to PEI are from the US. Therefore, it is highly likely that the results of this survey are representative of all PEI motor coach visitors.

An estimated 24,626 motor coach tourists visited PEI from June to December 2007. Given that the average party size was 1.99 people, this meant that 12,347 travel parties visited PEI as part of a motor coach tour. In addition, since the average length of stay was 1.99 nights, a total of 24,573 room nights were sold to motor coach visitors. The number of nights spent on PEI was split almost exactly equally between the main season of July and August and the rest of the year. However, almost 57 percent of individual motor coach passengers visited PEI in months other than July and August. This was the case since in the non-peak season the average number of nights spent in PEI by motor coach visitors was shorter, while the average party size was higher.

The largest portion of motor coach visitors came from New England with 35.3 percent of the travel parties. This was followed by the South Atlantic states which accounted for 27.8 percent of the motor coach travel parties. The only Canadian travellers that were captured in the survey were from Ontario, and they represented 5.3 percent of motor coach travel parties. The primary reason the motor coach visitors booked a bus tour that included a visit to PEI was PEI's natural beauty and pastoral settings.

Motor coach packages typically include the cost of transportation, accommodations, meals, and admission fees to certain events while in PEI. For example, visiting historical and cultural attractions, visiting Anne of Green Gables attractions and attending performances formed part of the package tours. Some tours also included tickets to a performance of Anne of Green Gables – The Musical at the Confederation Centre, a lobster dinner, a visit to Founders Hall, and a tour of Province House.

Excluding these types of costs, total direct expenditures by motor coach travellers in 2007 were approximately \$122 per party per visit or \$31 per person per night. In total, these motor coach visitors accounted for about \$1.5 million of spending, over and above the amounts paid for the items included in the cost of the motor coach tour. It must be noted that these “indirect” expenditures made to tourism operators in PEI by the tour operators would greatly increase the total economic impact of motor coach visitors. Direct expenditures during the main season were 45.5 percent of total expenditures. Per person per night spending in the off-peak season was 15 percent higher (\$4.28) than the peak season. Over the whole year, about 82 percent of the total direct spending was on shopping.

The overall results of the 2007-2008 visitor exit survey revealed that the average travel party stays an average of 4.15 nights in PEI, while US visitors spend an average of 5.9 nights. Motor coach visitors spend much less time in PEI, an average of almost exactly two nights. Note though that the average length of stay in the main season is higher than in the rest of the year (2.25 and 1.78 nights). The

relatively short stay means that motor coach visitors have less time to tour the province and see what it has to offer. Motor coaches arrive in PEI for a relatively short period of time and may only visit one or two areas of the province during their stay. It is clear then that to encourage motor coach visitors to return to PEI, good first impressions are essential.

A significant number of motor coach travellers were pleasantly surprised once they got to PEI. While only 57 percent of respondents strongly agreed that the inclusion of PEI in the motor coach travel itinerary was a major factor in their decisions to purchase the trip, 82 percent strongly agreed that PEI was one of the better destinations that they visited. In addition, almost all travel parties would recommend PEI as a travel destination to others. Complaints from motor coach travellers about PEI were minimal.

However, consistent with the results from other visitors, the one area of concern was with the prices of goods and services with an average rating of 3.5 (main season) and 3.1 (other seasons). Another area of concern was that very few motor coach visitors agreed or strongly agreed that the quality of the accommodations or meals and service in PEI were better than at other destinations visited. The most popular activities for these visitors were visiting historical and cultural attractions, visiting Anne of Green Gables attractions, and attending performances. In their short stay in PEI, these visitors focused on visiting cultural attractions that make PEI distinctive from other destinations.

About 94 percent of motor coach parties were couples, and there was almost an equal split between males and females. Almost all of the motor coach visitors were 55 years and over, were retired, and were first-time visitors to PEI. Each of these variables was consistent across seasons. Overall, approximately one-quarter of survey participants reported annual household income of \$125,000 or more, and the income level of the average motor coach party in the off-season was higher.

Finally, given their age and the travel distance involved, motor coach visitors likely prefer to travel to PEI by motor coach to avoid driving and planning the trip by themselves. Therefore, for any return trip to PEI, these visitors would likely wish to visit new areas of the province and experience new activities. If new motor coach itineraries were not offered, these visitors may be less inclined to return to PEI. Encouraging motor coach tour operators to offer different itineraries may result in more of these visitors booking another trip to the same region. Different itineraries may also appeal to other types of travel markets.

The implication is that more itineraries may lead to more motor coach visitors, both first-time and returning. If the additional itineraries result in even 20 percent more motor coach parties visiting PEI for the same number of nights as the current parties, an additional \$300,720 in direct spending will result. It is also important to note that this estimate excludes all of the other indirect spending in PEI that these visitors account for through the cost of the tour itself. The benefit of additional motor coach visitors will flow through to accommodation providers, restaurants, and entertainment venues.

1. OVERVIEW

Table 1, provided below, provides key summary data regarding motor coach visitors to PEI.

An estimated 24,626 motor coach tourists visited PEI from June to December 2007. Given that the average party size was 1.99 people, this meant that 12,347 travel parties visited PEI as part of a motor coach tour. In addition, since the average length of stay was 1.99 nights, a total of 24,573 room nights were sold to motor coach visitors. The number of nights spent on PEI was split almost exactly equally between the main season of July and August and the rest of the year. However, almost 57 percent of individual motor coach passengers visited PEI in months other than July and August. This was the case since in the non-peak season the average number of nights spent in PEI by motor coach visitors was shorter, while the average party size was higher.

Table 1: Overview of Visitation, Expenditures, and Trip Duration by Season

	Main Season ^a	Rest of Year ^b	Total
Total Number of Room Nights sold by Motor Coach ^c	12,430 (50.6%)	12,143 (49.4%)	24,573 (100.0%)
÷ Average Number of Nights stayed in PEI *	2.25	1.78	1.99
= Total Number of Motor Coach Travel Parties	5,517 (44.7%)	6,830 (55.3%)	12,347 (100.0%)
× Average Party Size	1.92	2.05	1.99
= Total Number of Motor Coach Tourists	10,606 (43.1%)	14,020 (56.9%)	24,626 (100.0%)
Total Average Spending per Party	\$123.61	\$119.77	\$121.78
Total Average Spending per Person per Night	\$28.54	\$32.82	\$30.61
Total Direct Expenditures ^d	\$681,919	\$818,084	\$1,500,003

Notes: a) The main season is July and August, 2007.

b) The rest of the year is the remaining months of the year that motor coach visitors travel to PEI.

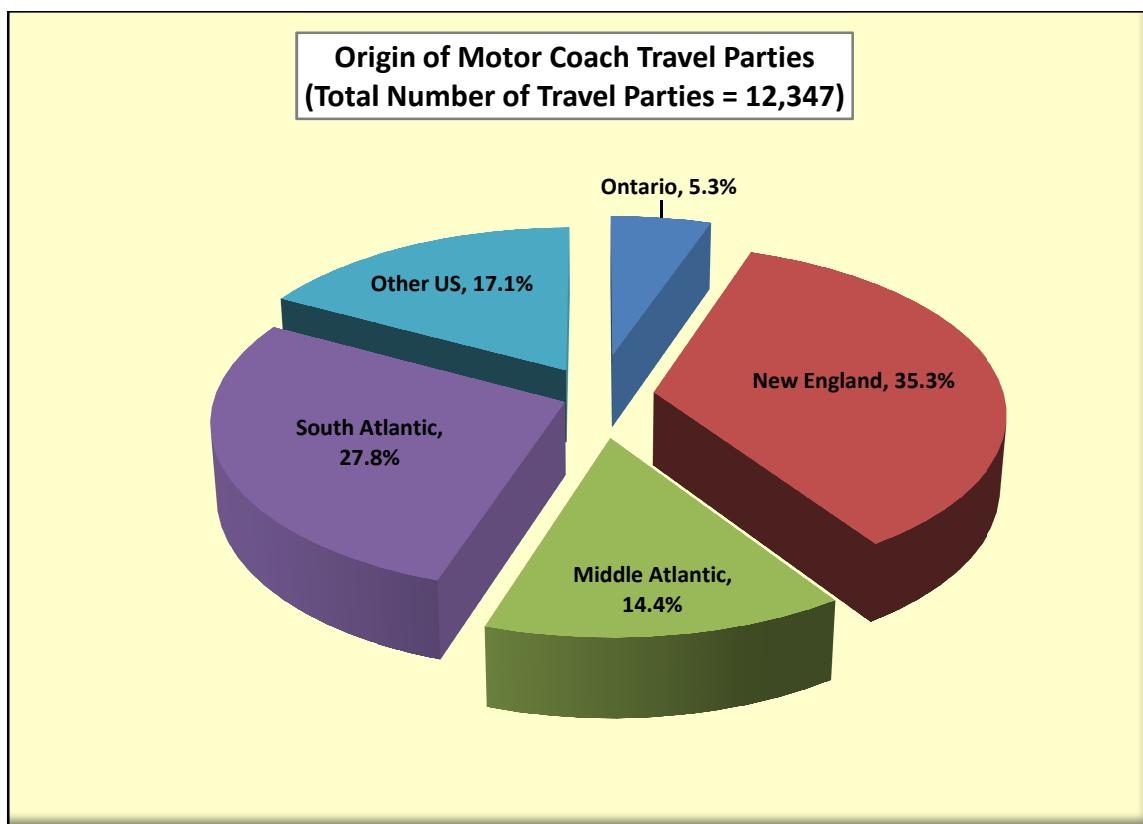
c) Actual data as reported by Tourism PEI's Occupancy Reporting System (Tourism Indicators).

d) Motor coach packages typically include the cost of transportation, accommodations, most meals, and admission fees to certain events while in PEI. Consequently, the estimate for direct expenditures excludes spending on these items. These indirect expenditures that were made to tourism operators on PEI by the tour operators would greatly increase the total economic impact of motor coach visitors.

2. ORIGIN OF MOTOR COACH TRAVEL PARTIES

Nearly all (94.7%) survey participants were from the United States. The only Canadian origin was Ontario, representing 5.3 percent of survey participants. Combined, travel parties from New England and the South Atlantic states made up over half (63.1%) of travel parties, with the greatest percentage of travel parties having originated from New England (35.3%).

Based on anecdotal comments from hotel operators and from Tourism PEI, it appears that most motor coach visitors to PEI are from the US. Therefore, it is highly likely that the results of this survey are representative of all PEI motor coach tourists.

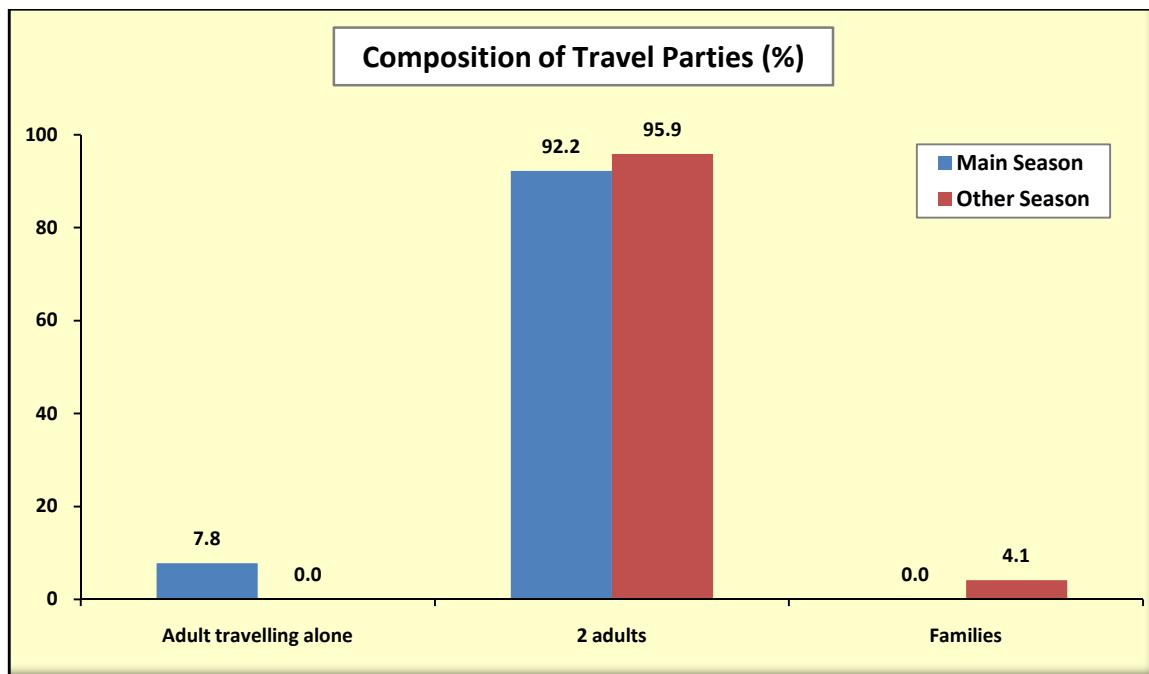


Note: Data are based on the origin of the person who completed the survey for each travel party, rather than on the origins of all motor coach tourists of each travel party.

3. COMPOSITION OF TRAVEL PARTIES

Motor coach visitors were most likely to travel in pairs regardless of the season. In the main season, the remaining motor coach visitors were travelling alone, while in the other seasons, the remaining visitors were families.

It would generally be assumed that families would be more likely to travel during the main season when children are on break from school. However, families were on board in the other seasons, suggesting that young families (with children not yet in school) or “older” families (with children above school age or adult families) were travelling via motor coach.

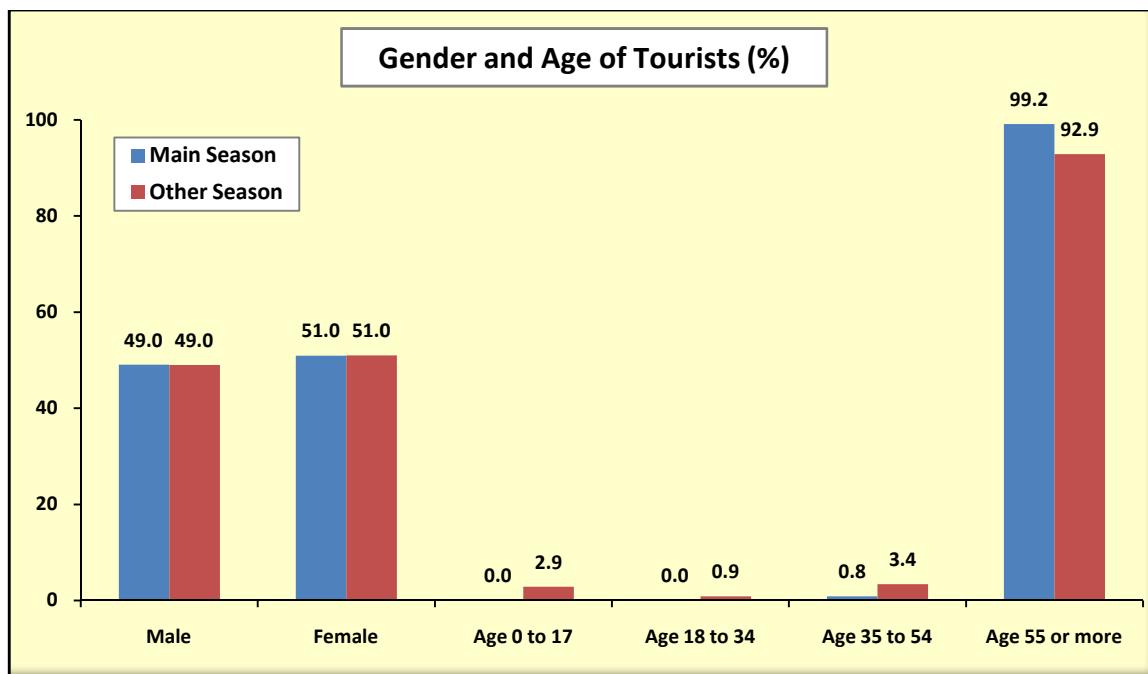


4. GENDER AND AGE OF VISITORS

There was nearly an even split between male and female motor coach visitors. Fifty-one (51) percent of visitors were female in both the main and other seasons. The majority of visitors were 55 years and over, particularly during the main season when 99.2 percent of motor coach visitors were in this age range. The remaining visitors during the main season were age 35 to 54. Comparing to the previous section, it can be concluded that most of the adults travelling alone during the main season were likely to be over the age of 55. It could be that these travellers are widowed or have no travelling companion.

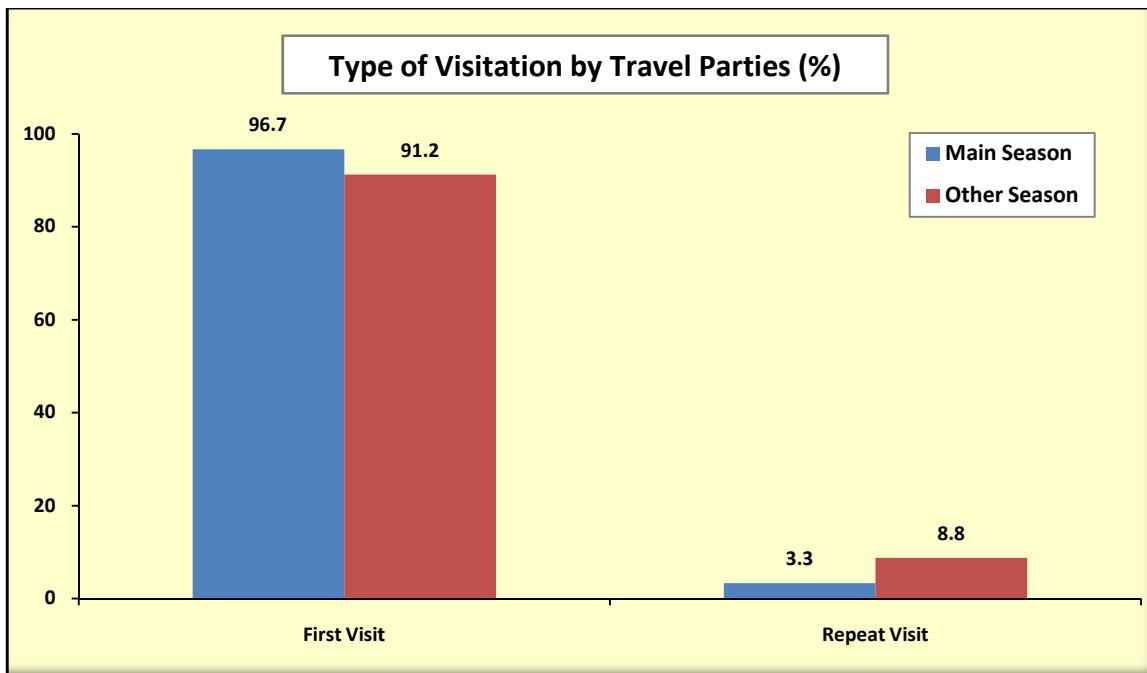
During the other seasons, the vast majority (92.9%) of visitors were age 55 and over, but as indicated in the previous section, families with children were also present. Approximately 3 percent of visitors were between 0 and 17 years of age. Less than 1 percent were between 18 and 34 years of age and 3.4 percent were between 35 and 54 years of age.

There are a number of reasons for the high proportion of travellers aged 55 and over. These travellers may be retired, have more time to travel, have fewer family obligations, have more disposable income, and prefer to let someone else do the planning and driving. It may also be that the activities included in motor coach tours are not attractive to young adults and families. Tour planners may consider organizing a few tours for these markets, after all, they will be the future patrons of motor coach tours.



5. TYPE OF VISITATION

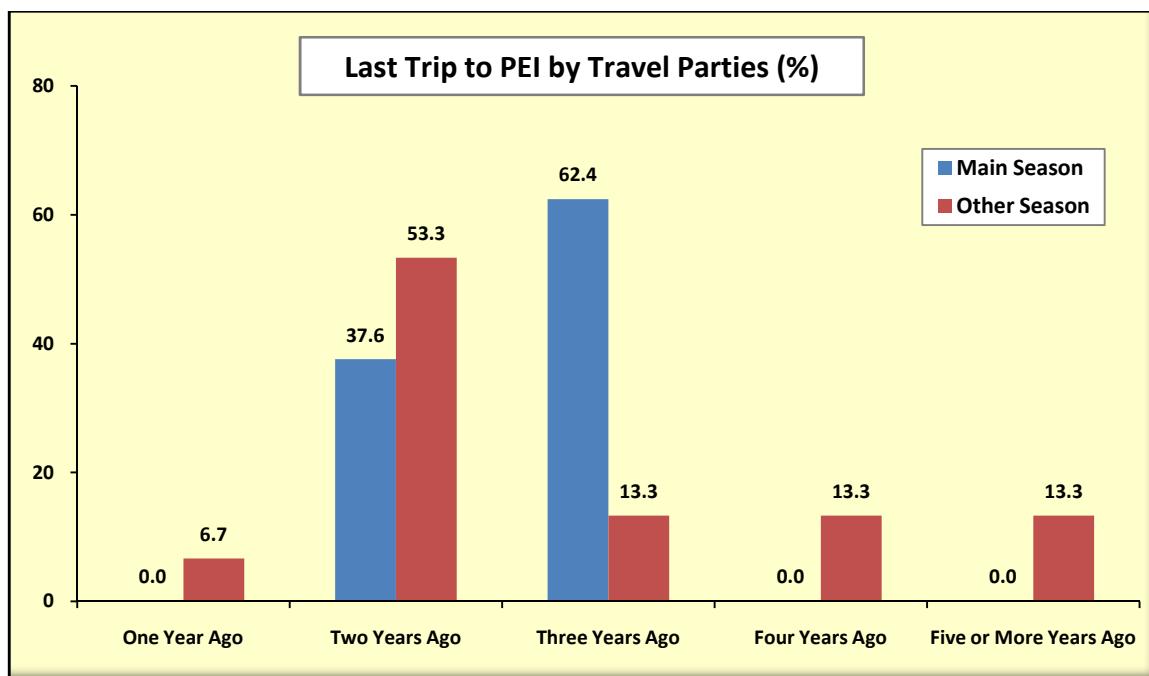
In opposition to most pleasure visitors to PEI, motor coach visitors were likely to be visiting PEI for the first time. Approximately 97 percent of main season motor coach visitors and 91 percent of other season visitors were visiting PEI for the first time. In contrast, nearly 80 percent of pleasure visitors to PEI from July 1, 2007 to June 30, 2008 were repeat visitors (see the TRC's report "Overall Results for the 2007-2008 Exit Survey").



6. LAST TRIP TO PEI

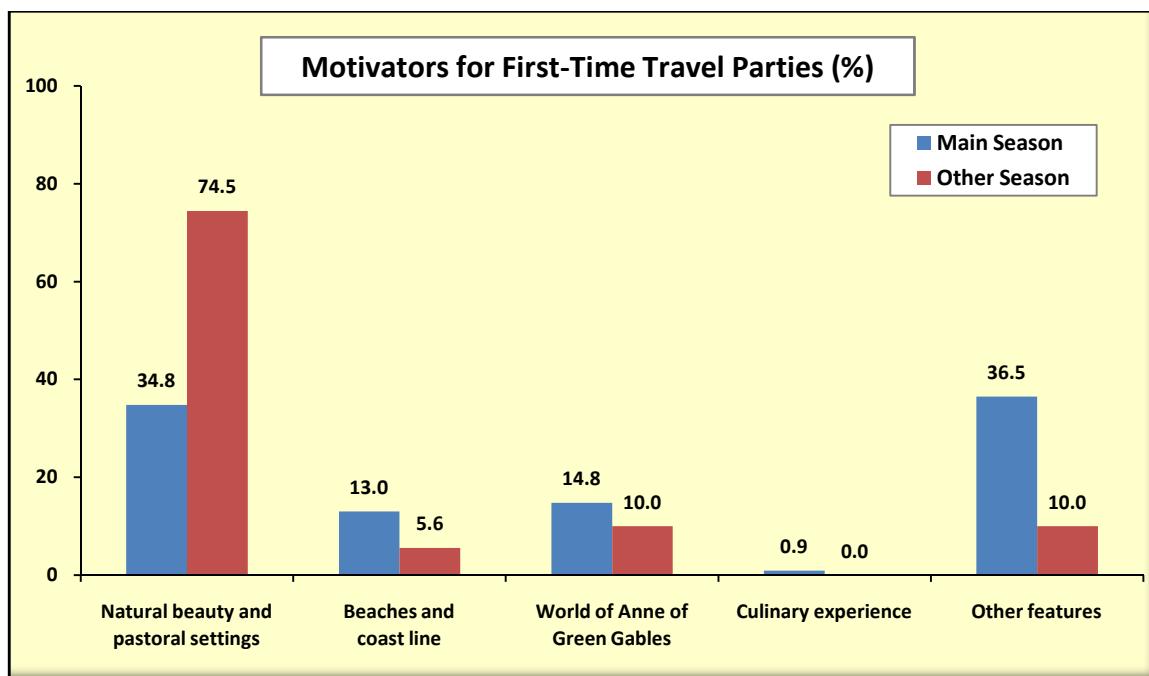
For the relatively few motor coach travel parties who had been to PEI previously, most had visited two or more years ago. Main season visitors who had previously visited PEI did so two (37.6%) and three (62.4%) years ago. Close to 7 percent of other season visitors last visited one year ago and 53.3 percent last visited two years ago. The remaining 40 percent of other season visitors visited three, four, or five or more years ago, with equal representation amongst the three timeframes.

The majority of motor coach visitors who had previously visited PEI last visited fairly recently, but a trip to PEI does not seem to be an annual event for many.



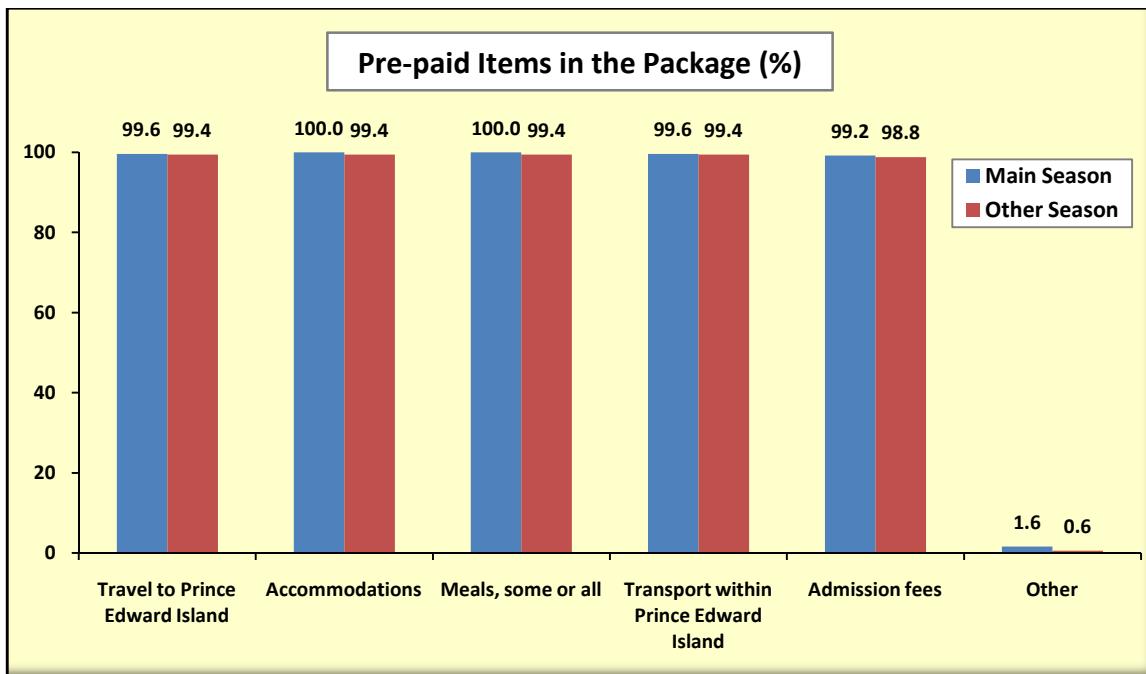
7. PRIMARY FEATURES THAT ATTRACTED FIRST-TIMERS TO PEI

Motor coach visitors who were visiting PEI for the first time were asked to indicate the primary reason they booked a bus tour that included a visit to PEI. PEI's natural beauty and pastoral settings attracted about 75 percent of other season travellers, while "other features" were most attractive for main season travellers (36.5%). With a high proportion of travellers selecting this option, it would be worthwhile to further develop the list of possible responses for this question in future surveys. Natural beauty (34.8%) and the World of Anne of Green Gables (14.8%) were other popular features during the main season. The results suggest that PEI's natural beauty is attractive during all seasons. It should be noted, however, that many respondents did not answer this question.



8. PRE-PAID ITEMS IN THE PACKAGE

The motor coach package price included key travel expenses for nearly all travel parties. Most visitors were not responsible for paying for transportation, accommodations, meals and admission fees while in PEI. A slightly greater percentage of main season travellers than other season travellers reported that these travel expenses were included in the package price.



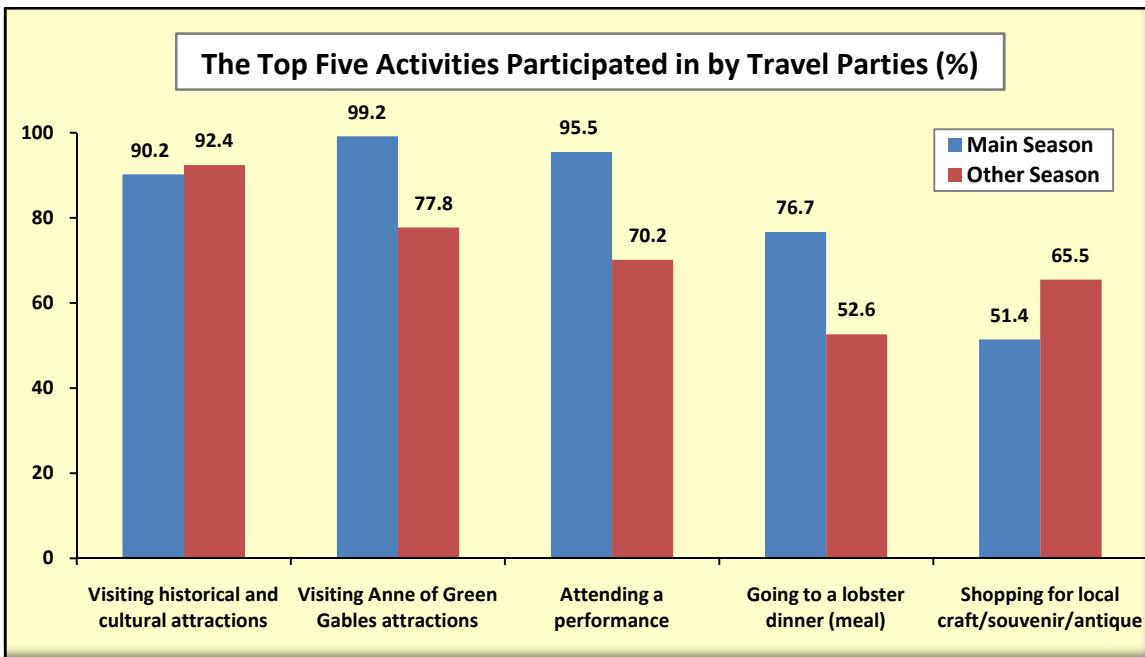
9. ACTIVITIES PARTICIPATED IN: THE TOP FIVE ACTIVITIES

Although the levels of participation varied, visiting historical and cultural attractions, visiting Anne of Green Gables attractions and attending performances had the highest levels of participation in all seasons. Almost all main season motor coach visitors visited an Anne of Green Gables attraction and attended a performance. This suggests that these activities may have been included as part of the tour package. Referring to section 8 above, it is likely that the admission fees for these activities were included in the package.

The itineraries for the motor coach tours visiting PEI in 2009 show great similarity in the activities included in the tour. The majority of motor coach tours in 2009 plan to stay two nights in Charlottetown and include a tour of the PEI National Park, the Anne of Green Gables house in Cavendish and free time in Charlottetown. Some tours include a viewing of Anne of Green Gables – The Musical, a lobster dinner, a visit to Founders Hall and a tour of Province House. Most of the activities are included within the tour but some, such as attending the musical, are optional.

The similarity of the itineraries of motor coach tours may impede repeat visitation by motor coach travellers. Given their age and the travel distance involved, motor coach visitors likely prefer to travel to PEI by motor coach to avoid driving and planning the trip by themselves. Therefore, for any return trip to PEI, these visitors would likely wish to visit new areas of the province and experience new activities. If new itineraries are not offered, these visitors may be less inclined to return to PEI. Encouraging motor coach tour operators to offer different itineraries may mean that more of these visitors are inclined to book another trip to the same region. Different itineraries may also appeal to younger travel markets.

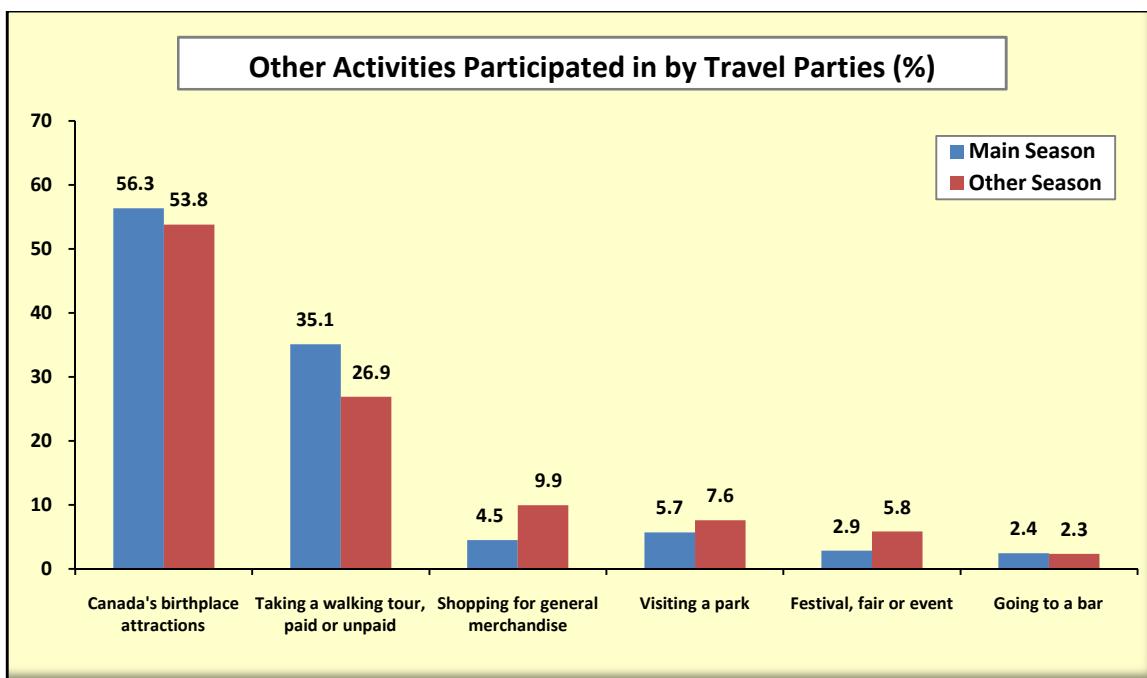
The implication is that more itineraries may lead to more motor coach visitors, both first-time and returning. If the additional itineraries results in even 20 percent more motor coach parties visiting PEI for the same number of nights as the current parties, an additional \$300,720 in direct spending will result. It is also important to note that this estimate excludes all of the other indirect spending in PEI that these visitors account for through the cost of the tour itself. The benefit of additional motor coach visitors will flow through to accommodation providers, restaurants, and entertainment venues.



10. ACTIVITIES PARTICIPATED IN: OTHER ACTIVITIES

Motor coach visitors had the opportunity to participate in a variety of activities during their stay in PEI. Aside from the top five activities discussed above, participation rates were fairly high for visiting Canada's birthplace attractions and taking a walking tour, during all seasons. Participation rates for these two activities, as well as going to a bar, were higher for main season visitors than other season visitors. Other season visitors were more likely than main season visitors to shop for general merchandise, visit a park and attend a festival, fair or event.

The lower overall participation rates during the other seasons may be a reflection of the shorter stays in PEI or the seasonality of some of the activities included in the list of options in the questionnaire.



11. EXPENDITURES

While motor coach package prices may have covered a number of additional costs besides the driving tour itself, passengers also made their own discretionary purchases while in PEI. Total direct expenditures by motor coach visitors, over and above the amounts paid for the items included in the cost of the motor coach tour, were approximately \$1.5 million. It must be noted that these “indirect” expenditures made to tourism operators in PEI by the tour operators would greatly increase the total economic impact of motor coach visitors.

Direct expenditures during the main season were 45.5 percent of total expenditures. Per person per night spending in the off-peak season was 15 percent higher (\$4.28) than the peak season. Despite consisting of only two months and 51 percent of total room nights, direct expenditures during the main season were 83 percent of total expenditures by motor coach passengers during the remaining ten months of the year.

Total direct expenditures by motor coach travellers in 2007 were approximately \$122 per party per visit or \$31 per person per night. Over the whole year, about 82 percent of the total direct spending was on shopping. Recreation and entertainment accounted for 10 percent of spending.

Considering only those passengers who reported expenditures, total average spending per person per night was \$32.48. The average passenger spent about \$29 per night on shopping. Spending on recreation and entertainment (\$26.10) and restaurants (\$23.80) were other significant forms of discretionary expenditure.

Table 2: Expenditures

	Main Season		Other Season		Total	
	5,517	44.7%	6,830	55.3%	12,347	100.0%
Total Direct Expenditures	\$681,919		\$818,084		\$1,500,003	
Total Avg. Spending per Party	\$123.61		\$119.77		\$121.78	
Total Number of Motor Coach Tourists	10,606		14,020		24,626	
Categories of Spending ^a						
Total Avg. Spending per Person per Night	\$28.54		\$32.82		\$30.61	
Accommodation	\$0.00 (n/a)		\$0.00 (n/a)		\$0.00 (n/a)	
Restaurants	\$2.14 (7.5%)		\$0.60 (1.8%)		\$1.35 (4.4%)	
Food & Beverages at Stores	\$0.45 (1.6%)		\$0.86 (2.6%)		\$0.66 (2.1%)	
Vehicle Operation & Local Transportation	\$0.09 (0.3%)		\$0.08 (0.2%)		\$0.08 (0.3%)	
Car Rentals in PEI	\$0.00 (n/a)		\$0.00 (n/a)		\$0.00 (n/a)	
Shopping	\$24.13 (84.6%)		\$26.14 (79.6%)		\$25.06 (81.9%)	
Recreation & Entertainment	\$1.36 (4.8%)		\$4.82 (14.7%)		\$3.12 (10.2%)	
Other Expenditures	\$0.36 (1.3%)		\$0.33 (1.0%)		\$0.34 (1.1%)	
Categories of Spending ^b						
Total Avg. Spending per Person per Night	\$31.63		\$33.15		\$32.48	
Accommodation	n/a		n/a		n/a	
Restaurants	\$23.61		\$25.00		\$23.80	
Food & Beverages at Stores	\$13.33		\$15.78		\$14.82	
Vehicle Operation & Local Transportation	\$7.16		\$6.25		\$6.91	
Car Rentals in PEI	n/a		n/a		n/a	
Shopping	\$28.00		\$30.25		\$29.24	
Recreation & Entertainment	\$26.04		\$26.11		\$26.10	
Other Expenditures	\$14.26		\$13.75		\$14.21	

Notes: 1) In this report, total direct expenditures estimated did not include any spending on accommodation (by tour operators and motor coach tourists).

2) Total direct expenditures estimated were calculated as follows: Total number of motor coach tourists' parties (12,347) × total average spending per party (\$123.61) ≈ \$1,500,000 or total average spending per person per night (\$30.61) × average number of nights stayed in PEI (1.99) × total number of motor coach tourists (24,626) ≈ \$1,500,000.

3) ^a indicates average spending per person based on all motor coach tourists.

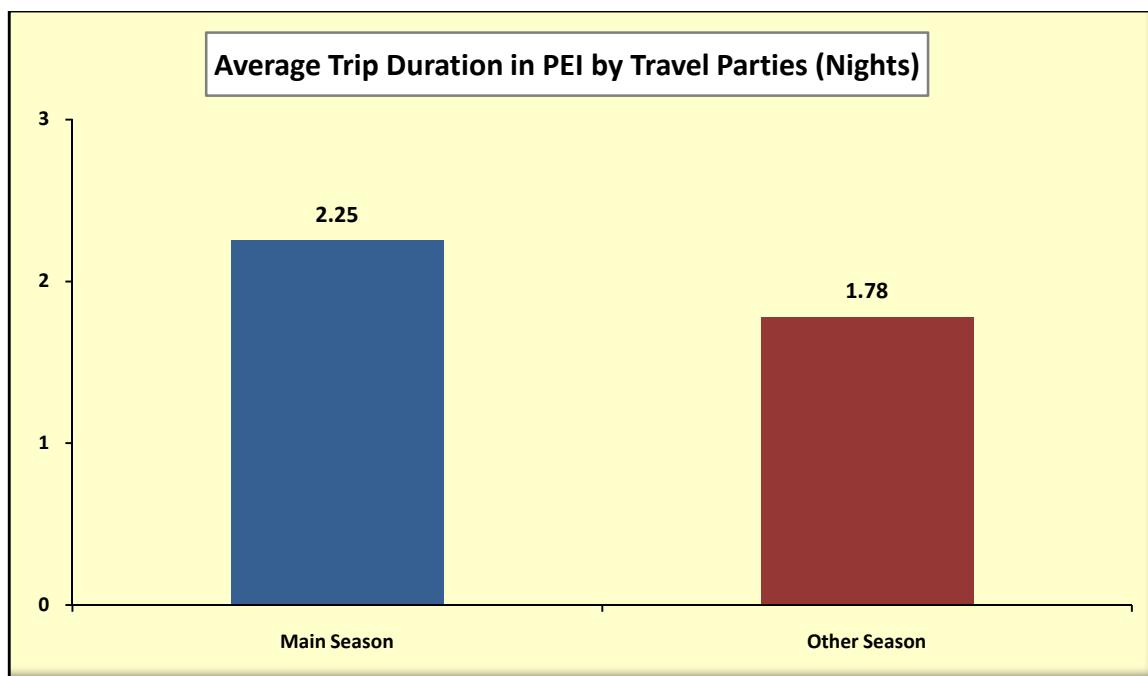
4) ^b indicates average spending per person based only on those tourists who reported spending on that category.

12. TRIP DURATION IN PEI

Motor coaches spend less time in PEI than the average visitor to PEI. The overall results of the 2007-2008 visitor exit survey revealed that the average travel party stays an average of 4.15 nights in PEI, while US visitors spend an average of 5.9 nights. Motor coach visitors spend much less time in PEI, an average of almost exactly two nights. Note though that the average length of stay in the main season is higher than in the rest of the year (2.25 and 1.78 nights).

The relatively short stay means that motor coach visitors have less time to tour the province and see what it has to offer. Motor coaches arrive in PEI for a relatively short period of time and may only visit one or two areas of the province during their stay. It is clear then that to encourage motor coach visitors to return to PEI, good first impressions are essential.

There may be an opportunity for tourism organizations to work with motor coach tour planners to arrange a variety of activities for motor coach tours to entice them to stay longer in PEI. The benefit of one more night spent in PEI would have the potential to flow through to accommodation providers, restaurants, and entertainment venues.

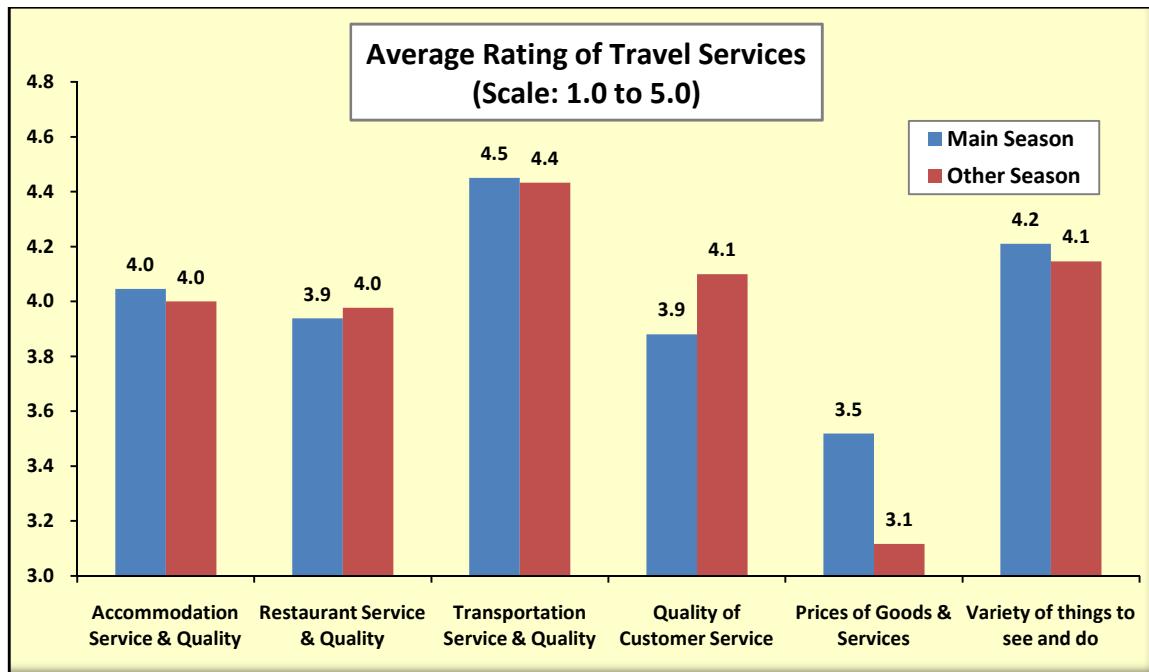


13. RATING OF TRAVEL SERVICES

Motor coach passengers were impressed with the travel services offered in PEI. All items were rated highly, ranging from 3.1 to 4.5 out of five. However, consistent with the results from other visitors, the one area of concern was with the prices of goods and services with an average rating of 3.5 (main season) and 3.1 (other seasons).

Visitors were particularly pleased with the service and quality offered in terms of transportation (4.5 main; 4.4 other). Accommodation service and quality was also rated high (4.0 all seasons) as was variety of things to see and do (4.2 main; 4.1 other). Service and quality rated highly in all aspects – accommodation, restaurant, transportation and customer service.

There is not much variation in the ratings between seasons, suggesting that PEI establishments are performing well year-round.

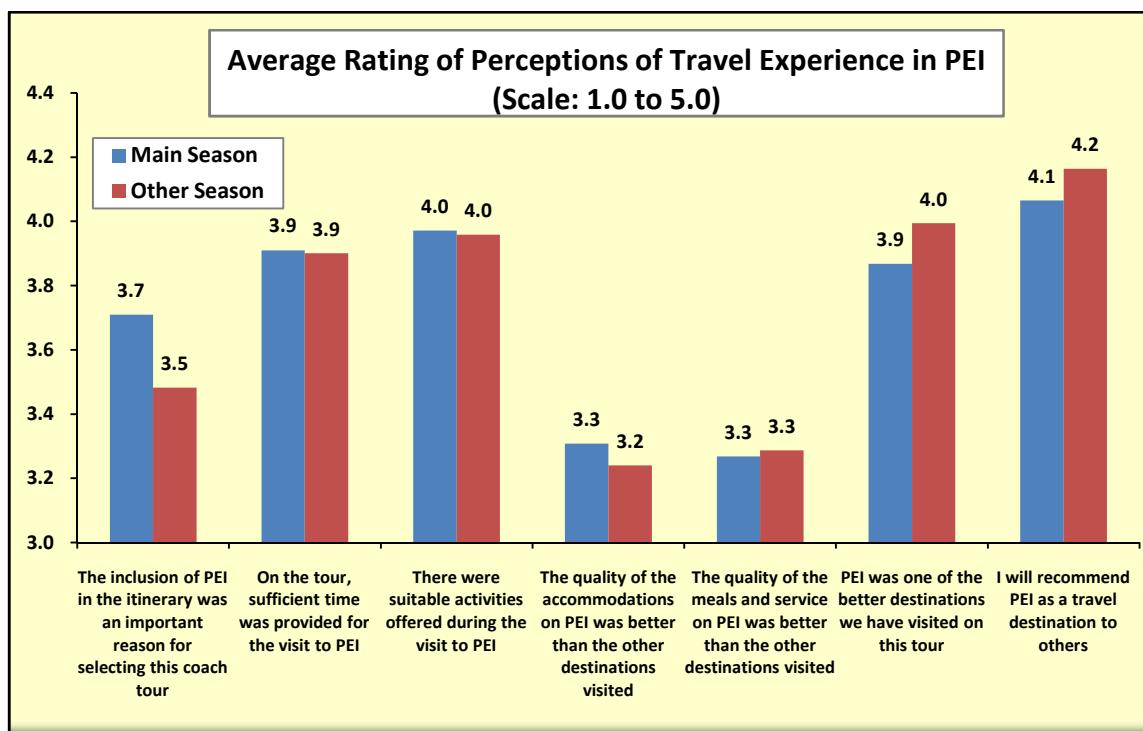


14. PERCEPTIONS OF TRAVEL EXPERIENCE IN PEI

Motor coach passengers were pleased with their travel experience in PEI. The ratings for each of the statements below were 3.2 and above, which is slightly higher than the neutral rating. The ratings were comparable across seasons, suggesting a consistent PEI tourism product overall.

A significant number of motor coach visitors were pleasantly surprised once they got to PEI. While only 57 percent of respondents strongly agreed that the inclusion of PEI in the motor coach travel itinerary was a major factor in their decision to purchase the trip, 82 percent strongly agreed that PEI was one of the better destinations that they visited. The implication is, perhaps, had they known more about PEI from the outset, the inclusion of PEI on the itinerary may well have had a stronger influence on more travel parties to buy the trip. This may have further implications for the form of marketing used to attract motor coach tourists in the future. In addition, almost all travel parties would recommend PEI as a travel destination to others.

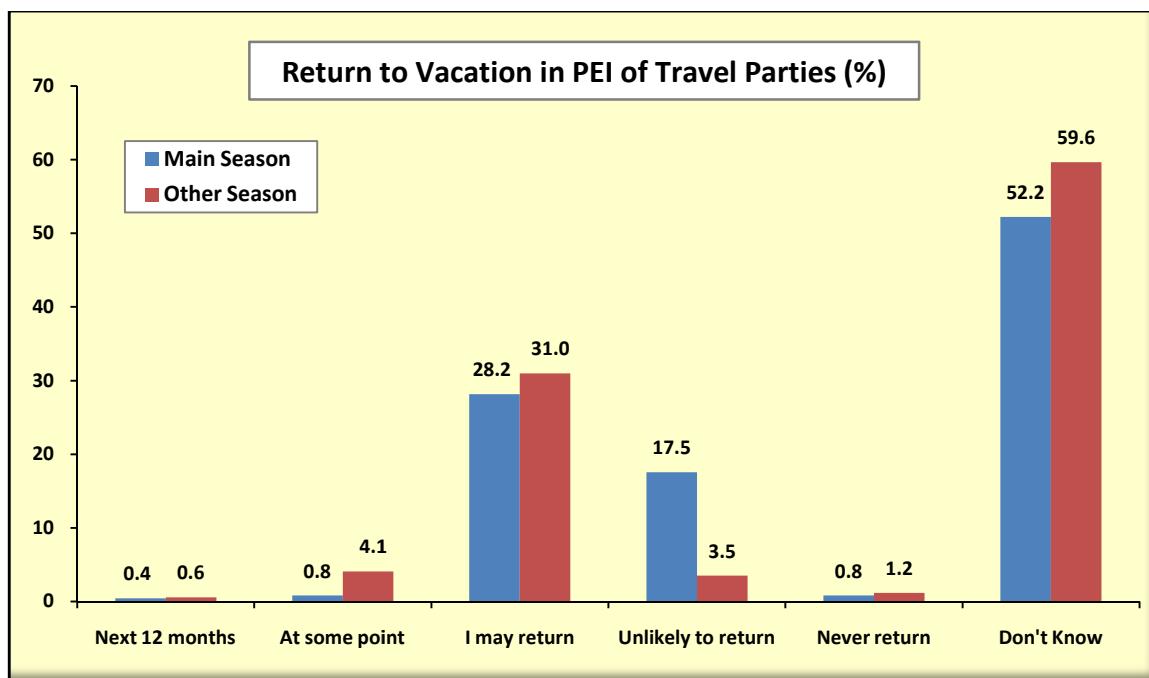
Passengers were pleased with the amount of time in PEI and with the activities that were offered during their visit. An area of concern is the lower rating for the quality of the accommodations, and of meals and service in comparison to the other destinations visited. Only about 30 percent of motor coach passengers agreed or strongly agreed with these statements. There may be room for improvement in these areas.



15. RETURN TO VACATION IN PEI

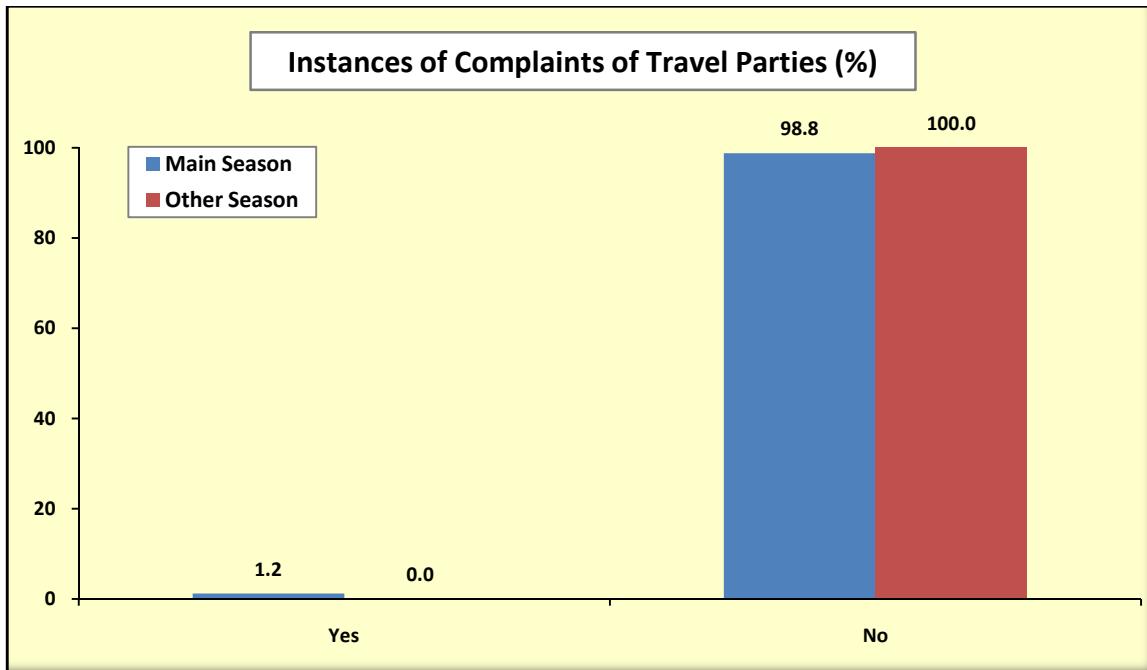
The majority of motor coach travellers were undecided as to the likelihood of returning to PEI in the future. Approximately 30 percent of travellers in all seasons suggested they may return. Nearly 5 percent of other season travellers plan to return at some point in the future. This compares to 1.2 percent of main season travellers.

The motor coach passengers may not wish to return on their own due to their older age and the travel distance to PEI. As discussed previously, motor coach passengers may be more inclined to return to PEI via motor coach if they had the opportunity to partake in new activities and see other regions of the province.



16. INSTANCES OF COMPLAINTS

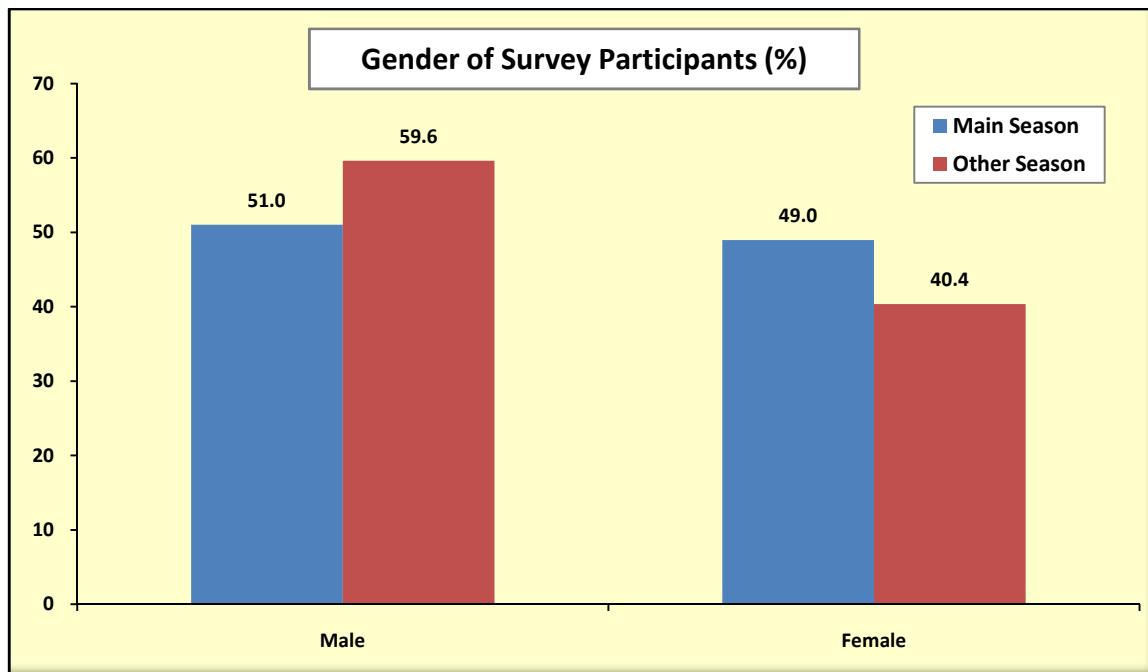
Complaints from motor coach travellers to PEI were minimal with zero instances of complaints by travellers during other seasons and by only 1.2 percent of main season motor coach travellers.



17. DEMOGRAPHICS OF THE PERSON COMPLETING THE SURVEY

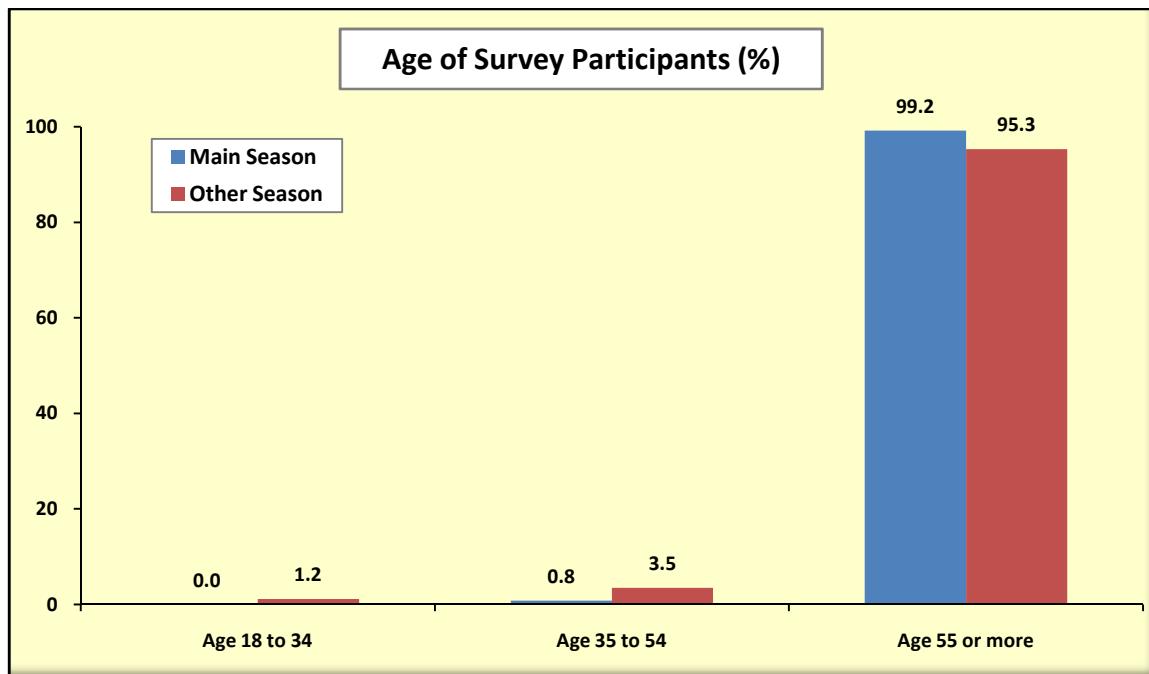
17.1. Gender

The majority of the participants completing the motor coach survey were male. It was almost an even split of males and females in the main season, but it was a 60-40 split in the favour of males in other seasons. That is to say, the percentage of males completing the survey increased in other seasons.



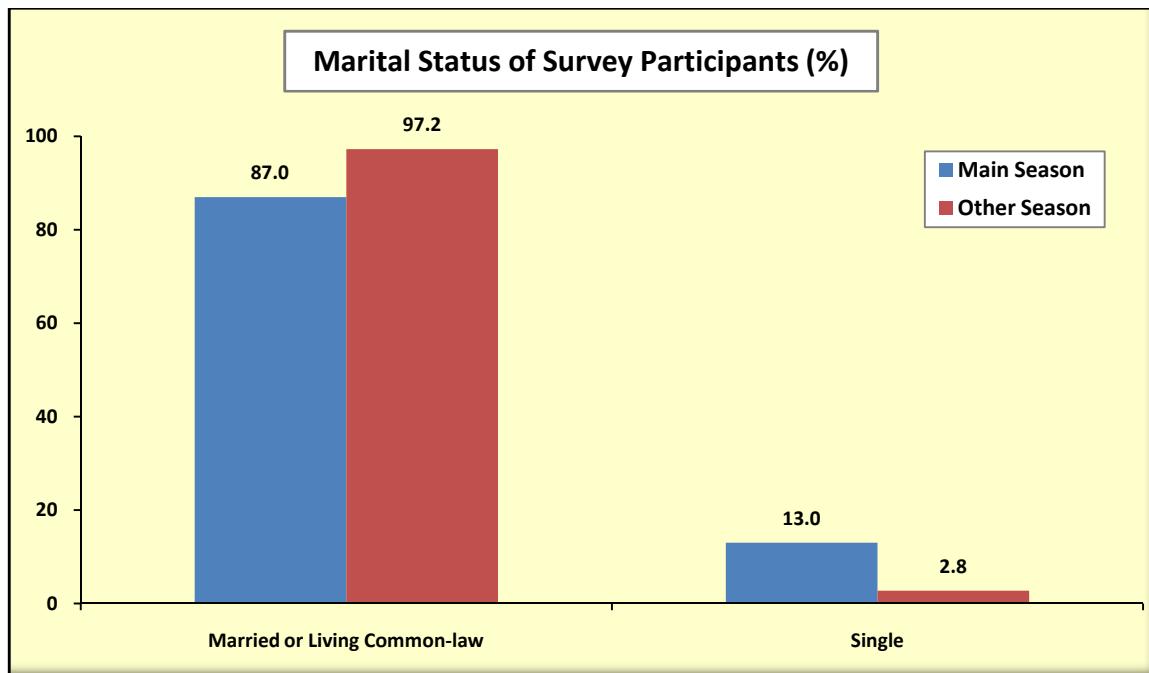
17.2. Age

Almost all the survey participants were over the age of 55, which is consistent with the ages of those in the travel parties. Representation from the young adult group, age 18 to 34, was minimal for the motor coach survey.



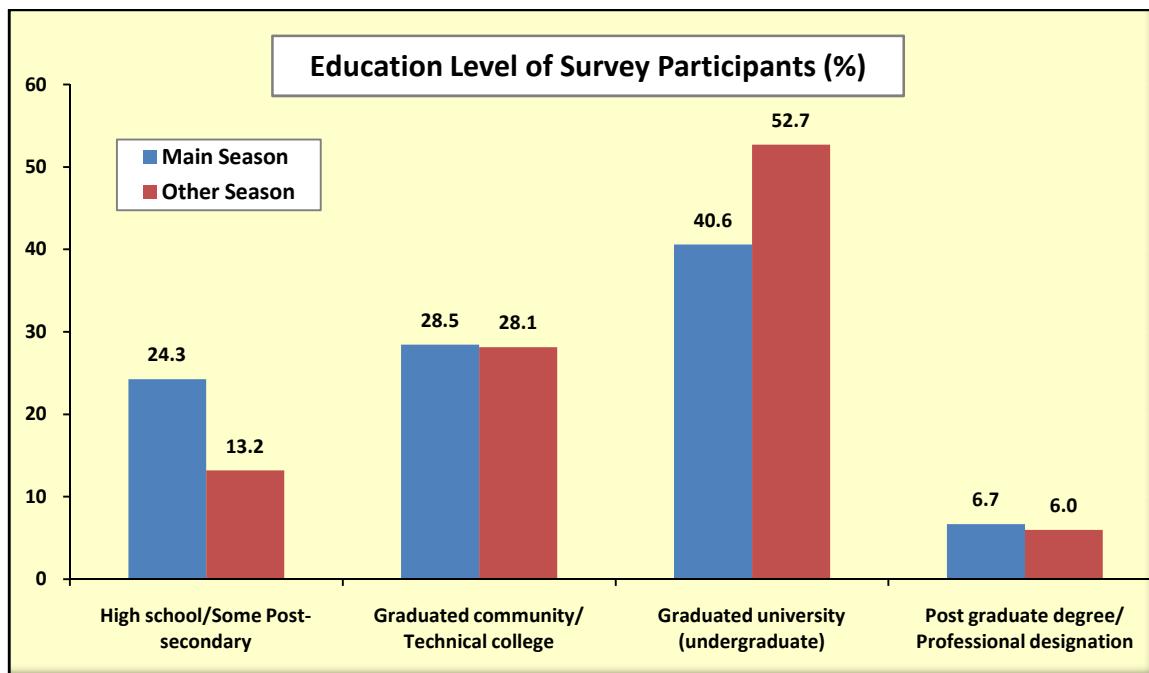
17.3. Marital Status

Most survey participants were married or living common-law. This was the case for nearly all travellers during the other seasons (97.2%). In both the main and other seasons, the remaining participants identified themselves as single. Thirteen (13) percent of main season travellers were single, which complements the result seen earlier regarding the greater prevalence of adults travelling alone during the main season (see section 3).



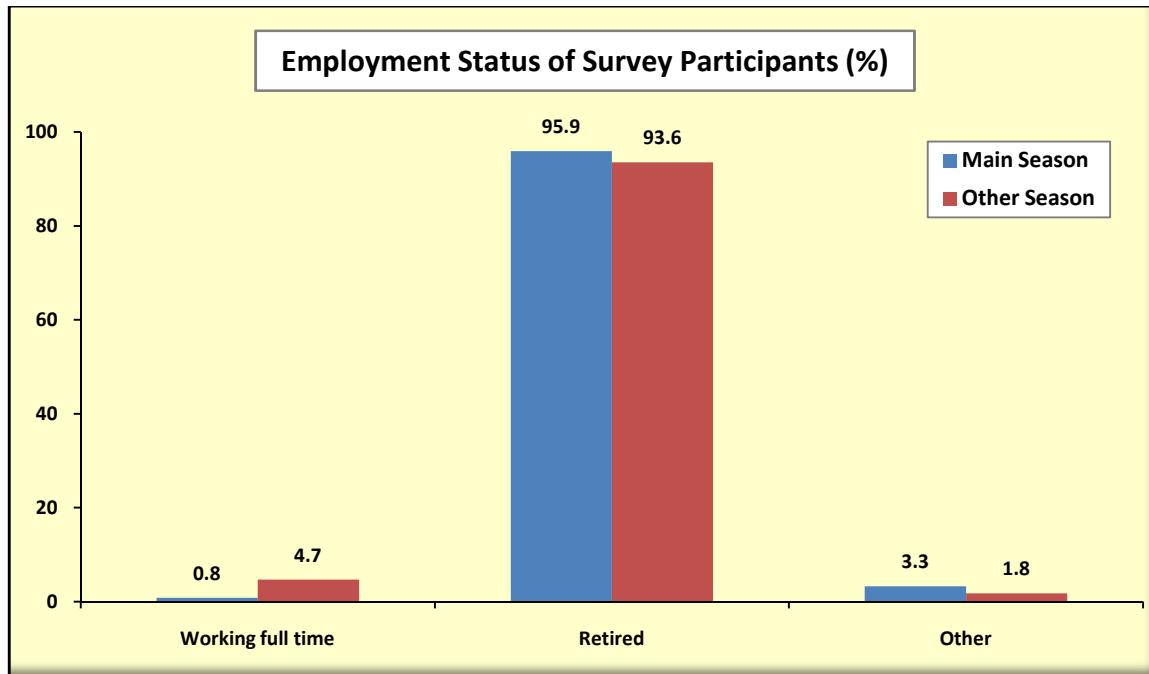
17.4. Education

The education levels of survey participants varied somewhat between the main and other seasons. Survey participants travelling during the other seasons were more likely to have graduated university (52.7% vs. 40.6%). Participants travelling during the main season were more likely to have graduated community/technical college (28.5% vs. 28.1%), high school/some post secondary (24.3% vs. 13.2%) and post graduate degree/professional designation (6.7% vs. 6%).



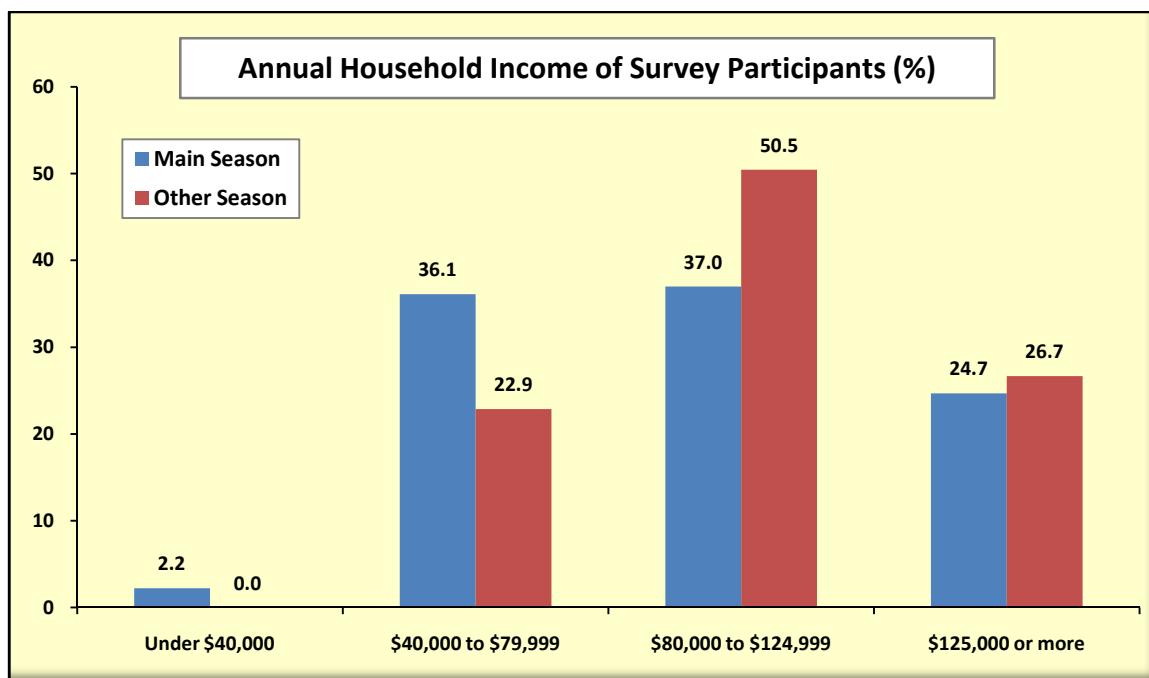
17.5. Employment Status

During all seasons, over 93 percent of survey participants reported being retired. The remaining survey participants were working full time or selected “other” as their employment status.



17.6. Annual Household Income

Annual household income varied among survey participants. During the main season, there was a similar percentage of participants indicating income in the \$40,000 to \$79,999 and \$80,000 to \$124,999 categories. Most (50.5%) participants in the other seasons reported annual household income of \$80,000 to \$124,999. Overall, approximately one-quarter of survey participants reported annual household income of \$125,000 or more. About 2 percent of main season participants reported annual income under \$40,000. This may be explained by the greater number of single travellers during this season (i.e. one-income households) or it may relate to the percentage of main season travellers who indicated an employment status of “other.”



APPENDIX I: METHODOLOGY

This report presents information collected from motor coach tourists who visited Prince Edward Island (PEI) in 2007. Data presented in this report was gathered using the “Prince Edward Island Travel Survey of Motor Coach Tourists.” This survey is one of a series of PEI travel surveys (including the overall Exit Survey, Cruise Ship Passenger Survey, and the Second-Home Owners Survey) re-designed by the Tourism Research Centre (TRC) on behalf of Tourism PEI.

The survey period commenced in the middle of June, and concluded at the end of December. Based on motor coach tour arrival schedules at any accommodation in Charlottetown, interviewers were present at the accommodation prior to the departure of the motor coach tour groups.

On any given motor coach departure day, tourists were approached in the lobby or waiting area of the accommodation and were asked to participate in the survey. The tourists were interviewed and the interviewee completed and collected the survey.

A total of 463 surveys were collected over the seven-month period. The data was cleaned by analyzing missing values and coefficient variance (CV). Consequently, 416 surveys were usable for further analyzing the data. The survey use rate was 89.8 percent.

The average error range with a sample of 416 is ± 4.7 percent. This means that in 19 out of 20 cases, the results based on a sample of 416 will differ by no more than 4.7 percent from what would have been obtained by interviewing all passengers who met the qualification criteria in the motor coach markets surveyed. In other words, if all motor coach tourists were surveyed, we would be 95 percent confident that the results of the survey would fall within a range of plus or minus 4.7 percent of the “true” results. An alternative way to view this statistical concept is that if the same survey were conducted 100 times, the results reported here would be within a range of plus or minus 4.7 percent 95 times out of the 100 times the survey was conducted.

Ideally, the survey results should be weighted to reflect the actual distribution of motor coach tourist population. Unfortunately, there are no statistics available that document the origins of PEI’s motor coach visitors. The only data available is from Tourism PEI’s Occupancy Reporting System and this is the number of room nights sold to motor coach parties. As shown in Table 1 in the report, room nights sold is the starting point for the analysis used in this report.

With the number of room nights sold, total motor coach parties can be estimated by dividing by the average number of nights stayed as reported by visitors. Then, the number of visitors can be estimated by multiplying by the average party size as reported by visitors. For the 2007 motor coach season, 24,573 room nights were sold to these visitors. Since the average number of nights spent on PEI was 1.9902, the implication is that 12,347 motor coach travel parties visited PEI in 2007. With a reported average party size of 1.9945 people, the number of individual motor coach visitors was 24,626 people.

The data was then split into main (July and August, 2007) and off-seasons (the rest of the months in 2007), and a similar analysis was completed for the two seasons. The data is provided in Table 1 in the main body of the paper. Note that the average number of nights stayed was higher in the main

season, while the average party size was higher in the off-season. So, there were 5,517 motor coach travel parties representing 10,606 visitors in main season and 6,830 parties representing 14,020 visitors in off-peak season.

Some parties or tourists did not, or were not able to answer all parts of the questionnaire. In some cases, some data was able to be inputted, but other data was not. In addition, the data has been rounded to the nearest 1 in most result tables. For this reason, some of the result tables may not exactly match with 12,347 parties.

Finally, note that the vast majority (94.7%) of motor coach passengers completing the survey were from the United States. Therefore, the survey results are for US motor coach passengers. However, based on anecdotal comments from hotel operators and from Tourism PEI, it appears that the vast majority of motor coach visitors to PEI are from the US. Unfortunately, given the lack of data regarding the origins of PEI's motor coach visitors, it cannot be definitively stated that the results of this survey are representative of all motor coach visitors. However, based on the anecdotal comments, it is highly likely that this data is reflective of all motor coach visitors.