

Economic Impact: Tourism 2004

FINAL REPORT

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1 INTRODUCTION

Economic Impact: Tourism 2004 is Tourism PEI's annual report on visitation, visitor profiles and visitor expenditures for the May to October tourism season. In order to ensure comprehensive information on expenditures and visitor demographics for the Island, a number of different data collection methods were utilized to gather data for this annual study. First of all, visitors to Prince Edward Island were intercepted as they were leaving the Island. This objective was achieved by placing on-site interviewers at Northumberland Ferries, Confederation Bridge, and the Charlottetown Airport. At each exit point, interviewers intercepted every third non-commercial vehicle or airport passenger using an "nth" sampling methodology. The selected parties were initially asked to identify whether they were a resident or non-resident of Prince Edward Island. The interviewer also recorded information on the number of residents intercepted. All intercepted non-resident parties were asked for information on their origin, number of people in their party, and purpose of their trip to the Island. The interviewer then attempted to recruit the non-resident for the follow-up telephone survey, conducted approximately two weeks after their return home. In addition to the on-site intercept, self-administered surveys were conducted with Motorcoach and Japanese visitors during the study period.

This report contains information on key tourism indicators such as visitor expenditures, origins, demographics and travel motivators. Also included in this report is information on visitor activities, trip planning, mode of travel, type of accommodation, and length of stay. A profile of pleasure visitors by origin is presented in Section 5 of this report. Section 6 profiles pleasure visitor demographics, travel patterns and expenditures for each of the Island's tourism regions. The weighting system used for this study differed from the system used in previous Tourism PEI exit surveys. This modification to the weighting system in 2004 does not allow for comparisons to the data collected in previous years.

The purpose of this report is to provide travel statistics, indicators and information for the 2004 tourism season in Prince Edward Island. For more details on this study, please contact the Policy, Planning and Research Division, Tourism PEI at 902-368-5540.

2 METHODOLOGY AND REPORTING

To assess Tourism PEI's visitor and expenditure analysis for the 2004 tourism season, a number of different data collection methods were utilized:

- Exit point intercepts of non-resident visitors;
- Telephone interviews with non-resident visitors;
- Self-administered surveys with motorcoach visitors; and
- Self-administered surveys with Japanese visitors.

Traffic data provided by Northumberland Ferries, Confederation Bridge and the Charlottetown Airport, in addition to data on average party size and origin ratios, was used to determine the actual number of non-resident visitors to the Island during the 2004 tourism season.

Non-Resident Exit Point Intercepts

Fully trained Market Quest interviewing staff were placed at Northumberland Ferries, Confederation Bridge and Charlottetown Airport during the period of June 1st to September 30th, 2004. Intercept staff randomly selected every third departing airport passenger or non-commercial vehicle using an nth sampling methodology. As an individual was intercepted, the interviewer first determined their resident/non-resident status. For all non-resident contacts, preliminary information on their trip to PEI was collected and an attempt was made to recruit them for a follow-up telephone interview. A sampling plan was developed and implemented to ensure all days of the week, and parts of the day (morning, afternoon, evening) were adequately sampled.

A total of 19,100 contacts were successfully intercepted during this study, including 5,736 resident intercepts and 13,364 non-resident intercepts. From these non-resident intercepts, 6,991 or 52% agreed to participate in a follow-up telephone interview. All information collected during the intercept interviews was data-entered into an SPSS data file.

Telephone Interviews

This component of the study consisted of a quantitative survey administered by telephone with a random sample of the recruited and consenting non-resident visitors. The purpose of the telephone survey was to collect demographic, travel behavior, and economic indicators from non-residents that visited PEI during the 2004 season.

The sampling frame for this study included all visitors intercepted in PEI that agreed to be contacted to complete the telephone survey upon their arrival home. On an ongoing basis, random samples were drawn from the intercept database based on month of intercept and visitor origin. When drawing samples, Market Quest ensured that participants were contacted within two weeks following their arrival home. Overall, a total of 2,930 telephone interviews were completed (2,698 pleasure visitors and 232 business visitors). The table below presents the number of completed interviews by visitor origin for pleasure visitors. A total of 232 business visitors were interviewed, providing a margin of error of $\pm 6.4\%$, at the 95% confidence level.

Pleasure	Total Interviews	Margin of Error
Newfoundland and Labrador	108	± 9.3%
Nova Scotia	403	± 4.9%
New Brunswick	327	± 5.4%
Quebec	220	± 6.6%
Ontario	402	± 4.9%
Other Canada	306	± 5.6%
New England	352	± 5.2%
Mid Atlantic	151	± 7.9%
Other US	300	± 5.6%
International	129	± 6.4%
Total	2,698	± 1.9%

The questionnaire used for the telephone interviews was designed by Tourism PEI and reviewed by Market Quest prior to data collection. The survey included various topic areas including: demographics, psychographics, travel details, activity preferences and travel purchasing and planning habits. The survey took approximately 10 –12 minutes to administer by phone. As part of our stringent quality control approach, we conducted a pre-test of the questionnaire. This allowed for confirmation of the survey length, ensured an efficient and effective flow of information, that the desired information was being obtained, and identified any untapped data collection opportunities.

Motorcoach and Japanese Surveys

During the tourism season, departing motorcoach visitors were intercepted at their hotel/motel and surveyed about their stay in Prince Edward Island. For 2004, a total of 400 surveys were completed with motorcoach visitors over the course of the study period. This sample size provides a margin of error of ± 4.9%, at the 95% confidence level.

In addition, Charlottetown-based Prince Edward Tours distributed Japanese language visitor questionnaires to their Japanese clients during the study period. These surveys were self-completed by the Japanese clients.

This Report

This report presents the findings of the 2004 Tourism PEI Exit Survey. In this report, a summary of key findings is presented, followed by a summary of the results for motorcoach and Japanese visitors. Next, the survey results are profiled for each tourism origin market and PEI tourism region.

All data analysis for this study was conducted using SPSS Version 11.5 statistical software. Due to rounding, the percentages in each table or graph may not equal exactly 100%. Tables and graphs that include responses to questions where more than one response could be indicated are referred to as multiple response questions and are marked with an "*" in the title of the table or graph. Percentages in these tables or graphs may sum to greater than 100%. Readers should also note that responses of less than 2% are noted as "Other mentions" in all tables and graphs. Furthermore, means that are presented throughout the report are filtered for outliers to obtain the most accurate representation of the population possible.

In order to ensure the sample was an accurate representation of the population of visitors during the tourism season, weights were applied to the data. Although data collection was only completed during the period of June to September, the sample data was weighted to ensure it mirrored the population of non-resident visitors during the period of May 1st to October 31st, 2004. The weighting system used for this study differed from the system used in previous Tourism PEI exit surveys. This modification to the weighting system in 2004 does not allow for comparisons to the data collected in previous years.

3 ISLAND SUMMARY

The following section presents an overall summary of expenditures, origins and destinations for all non-resident visitors to Prince Edward Island during the tourism season.

During the 2004 tourism season¹, it is estimated that a total of 347,514 parties visited Prince Edward Island. Specifically, these parties consisted of:

- 301,280 pleasure parties
- 34,280 business parties
- 11,954 motorcoach parties

The number of visitors to PEI in 2004 equaled approximately 998,866. It is estimated that these visitors spent a total of \$291.7 million during their time in the province². Following is a summary of visitors based on number and expenditures spent in 2004.

- 913,068 pleasure visitors spending approximately \$261.4 million
- 59,500 business visitors spending approximately \$21.8 million
- 26,298 motorcoach visitors spending approximately \$8.5 million

Pleasure parties who exited the Island via air or auto accounted for 87% of all visitor parties to Prince Edward Island in 2004, while business parties accounted for 10%, and motorcoach parties accounted for the remaining 3%.

¹ Tourism season refers to May 1, 2004 to October 31, 2004.

² Includes all auto, air and motorcoach visitors (pleasure and business).

To identify the primary region where visitor parties stayed during their visit to Prince Edward Island, business and pleasure visitors were asked to identify their “main overnight destination” on the Island. As shown in Exhibit 1, the majority (62%) reported that they stayed overnight in Cavendish, Beaches, and the Dune Shore³ or Charlottetown (31% each).

Main Overnight Destination (Pleasure and Business Visitors)

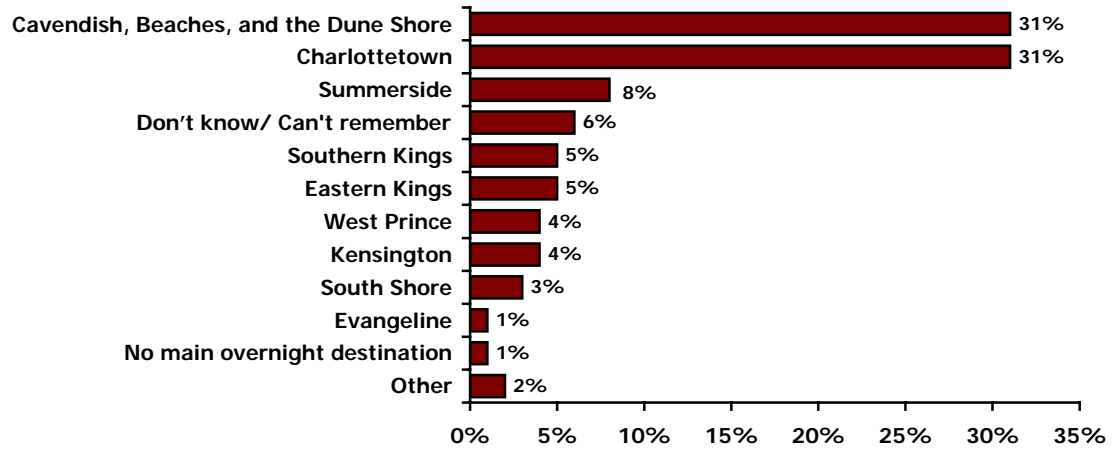


Exhibit 1

³ Cavendish, Beaches, and the Dune Shore replace the former tourism regions of Cavendish, New London, and the Beaches.

Visitors were asked to identify whether they had travelled more than 30 minutes away from their main overnight destination to sightsee or visit an event or attraction. Visitors who had taken a day trip away from their main overnight destination were asked to identify the community they visited. Similar to the main overnight destination, the communities provided by visitors were classified according to the tourism regions in the province. It is important to note that the estimates below do not include visitors who spent the night in each region.

Overall, 71% of pleasure and business visitors to PEI took a day trip at least 30 minutes away from their main overnight destination. The Charlottetown (52%) and Cavendish (48%) regions were the most frequented day trip destinations for 2004 pleasure and business visitors (Exhibit 2).

Day Trip Visitation Outside Main Overnight Destination*		
Region	% of All Visitors (Pleasure & Business)	Number of Visitors (Pleasure & Business)
Charlottetown	52%	503,057
Kensington, Cavendish	48%	470,230
Summerside	37%	362,013
Brudenell, Georgetown, Montague	29%	280,531
Gateway Village, Victoria by the Sea	28%	274,002
Tignish, Alberton, Mill River, O'Leary	20%	196,924
Mount Stewart, Crowbush	19%	180,345
Tyne Valley, Wellington, Miscouche	15%	149,275

*Multiple Responses Allowed

Exhibit 2

Visitors to Prince Edward Island can be profiled using ten visitor origin markets: Newfoundland and Labrador, Nova Scotia, New Brunswick, Quebec, Ontario, Other Canada (AL, MB, SK, BC and the Territories), New England States, Mid-Atlantic States, Other US, and International.

Exhibit 3 illustrates the market share for pleasure and business visitors from each origin market for the 2004 tourism season. Overall, Ontario provided the largest market share of pleasure and business visitors in 2004 (24%), followed by Nova Scotia (20%), and New Brunswick (18%). The smallest proportion of 2004 pleasure and business visitors came from the Mid-Atlantic States (3%), International (2%) and Newfoundland and Labrador (1%).

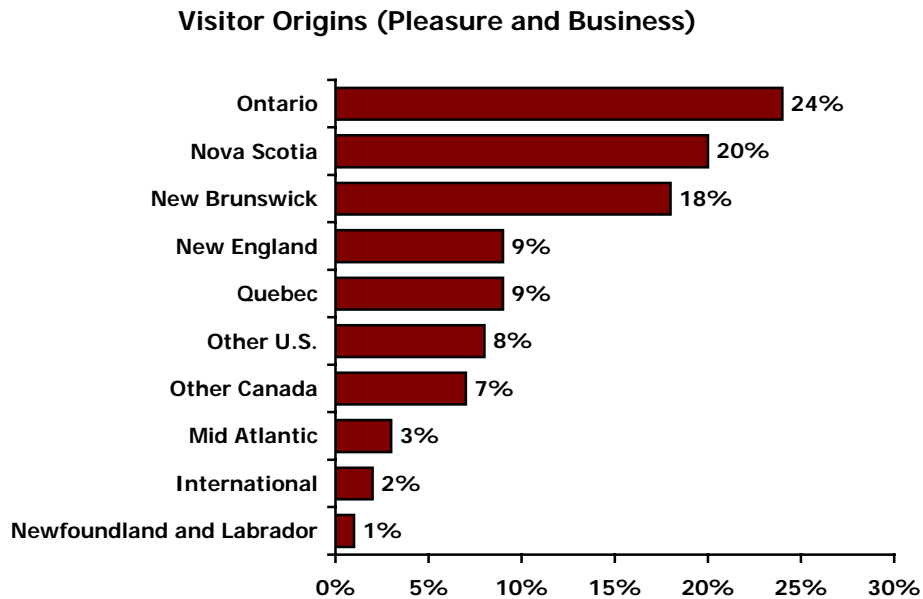


Exhibit 3

Exhibit 4 summarizes visitation and expenditure estimates for Prince Edward Island for the 2004 tourism season (May 1, 2004 to October 31, 2004).

Summary					
Visitation and Expenditure Estimates: May 1, 2004 to October 31, 2004					
Segment	<i>Percent of Parties</i>	<i>Number of Parties</i>	<i>Average Party Size</i>	<i>Number of Visitors</i>	<i>Total Expenditures (Millions)</i>
Pleasure					
Newfoundland and Labrador	1.4%	4,942	3.22	15,913	\$7.1
Nova Scotia	15.8%	55,043	3.14	172,835	\$35.3
New Brunswick	14.2%	49,464	3.38	167,188	\$31.9
Quebec	8.1%	27,975	2.90	81,128	\$25.5
Ontario	20.6%	71,206	3.08	219,314	\$69.5
Other Canada	5.9%	20,456	2.76	56,459	\$19.7
New England	8.6%	29,957	2.91	87,175	\$33.9
Mid Atlantic	2.6%	9,176	2.75	25,234	\$9.9
Other US	7.2%	25,047	2.70	67,627	\$20.1
International	2.3%	8,014	2.52	20,195	\$8.5
Total Pleasure	86.7%	301,280	3.02	913,068	\$261.4
Motorcoach	3.4%	11,954	2.20	26,298	\$8.5
Business	9.9%	34,280	1.75	59,500	\$21.8
Overall Total	100%	347,514	2.33	998,866	\$291.7

Exhibit 4

4 PRINCE EDWARD ISLAND'S VISITOR PROFILES

4.1 Section 1: Pleasure Visitor Profile

The following section presents the results for pleasure visitors to Prince Edward Island during the 2004 tourism season. For the purpose of this report, pleasure visitors are defined as those pleasure visitors who exited the Island by air or private vehicle via Confederation Bridge, Wood Island Ferry or Charlottetown Airport.

Visitor Origins

As stated in the Island Summary, approximately 301,280 pleasure parties visited Prince Edward Island, consisting of 913,068 pleasure visitors during the 2004 tourism season.

Exhibit 1 illustrates the market share for pleasure visitors each origin market for the 2004 tourism season. Overall, Ontario provided the largest market share of pleasure visitors in 2004 (24%), followed by Nova Scotia (18%), and New Brunswick (16%). The smallest market share of 2004 pleasure visitors came from the Mid-Atlantic States (3%), International (3%) and Newfoundland and Labrador (2%).



Exhibit 1

Visitor Expenditures

Overall, pleasure visitors accounted for \$261.4 million in expenditures during the 2004 tourism season. Accommodations accounted for 34% of total pleasure visitor expenditures, followed by meals (20%), auto expenses (11%), groceries (9%) and souvenirs (9%) (Exhibit 2).

Pleasure Visitor Expenditure Items

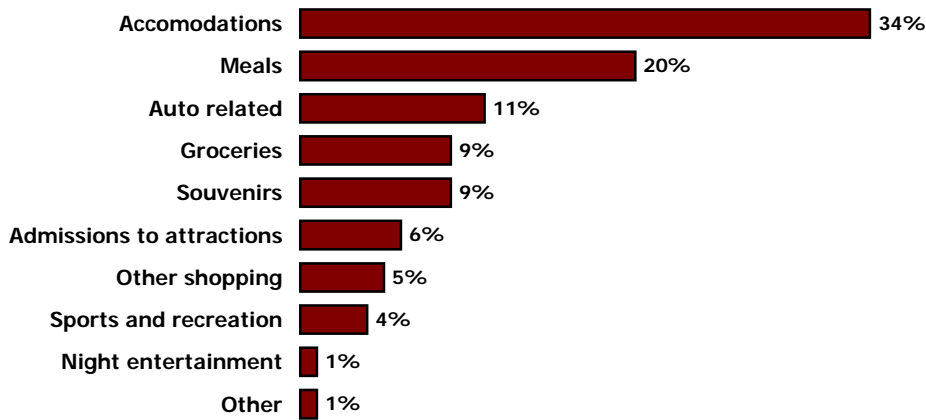


Exhibit 2

Party Composition and Size

The average party size for pleasure visitors during 2004 was 3 persons. Adults (one couple only) accounted for 44% of pleasure travel parties to Prince Edward Island followed by families with children under the age of 18 (31%), and a group of friends/ adults traveling together (11%) (Exhibit 3).

Travel Party Composition	
Adults (one couple)	44%
Family with children <18 years	31%
Group of friends/ adults	11%
Adults (2 or more couples)	9%
Single traveller	5%
Other	1%

Exhibit 3

Exhibit 4 illustrates travel party composition by origin visitor market.

Party Composition by Origin				
	Single Traveller	Single Adult Couple	Family with Children <18	Group of Friends/Adults
Newfoundland and Labrador	2%	31%	58%	9%
Nova Scotia	7%	41%	30%	22%
New Brunswick	4%	30%	49%	17%
Quebec	3%	53%	29%	15%
Ontario	4%	44%	32%	19%
Other Canada	8%	46%	21%	25%
New England	4%	51%	24%	21%
Mid Atlantic	8%	52%	23%	17%
Other US	5%	52%	16%	26%
International	7%	59%	22%	13%

Exhibit 4

Main Reason for Visiting Prince Edward Island

The main reason for visiting PEI was to visit relatives, family and friends (20%), out of curiosity (14%), and past experiences/ return visit (13%) (Exhibit 5).

Main Reason for Visiting PEI	
Visit relatives/ friends	20%
Curiosity/ never visited before	14%
Past experience/ return visit	13%
Scenery/ landscape/ sightseeing	8%
See Atlantic/ Maritime provinces	7%
Beaches	5%
Sports related	5%
Anne of Green Gables	5%
Confederation bridge	3%
Lived there before	3%
Getaway/ holiday	2%
Attractions in general	2%
Parks/ camping	2%
Work related	2%
Personal/ family event	2%
Other	8%

Exhibit 5

Main Overnight Destination

Visitors were asked to identify their main overnight destination in Prince Edward Island. The destinations provided by respondents were classified according to the nine tourism regions in the province. As shown in Exhibit 6, the two main overnight destinations for 2004 pleasure visitors to Prince Edward Island were Cavendish, Beaches, and the Dune Shore tourism region (33%) and the Charlottetown tourism region (28%).

Main Overnight Destination

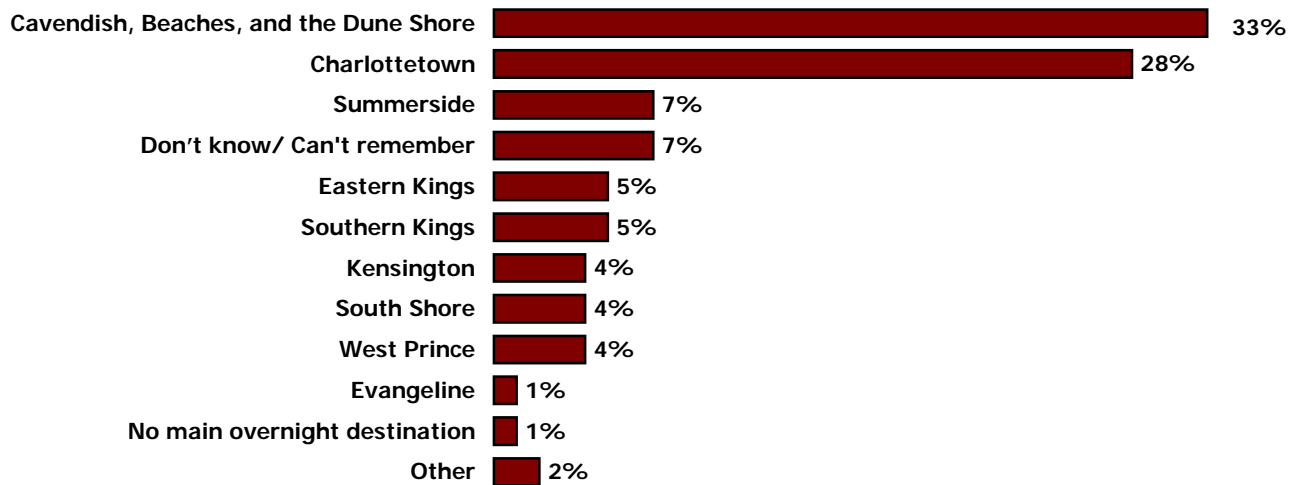


Exhibit 6

Day Trip Destinations

Overall, three-quarters of pleasure visitors to PEI took a day trip at least 30 minutes away from their main overnight destination (74%). The Charlottetown (65%) and Cavendish (62%) regions were the most frequented day trip destinations for 2004 pleasure visitors (Exhibit 7).

Day Trip Visitation Outside Main Overnight Destination*		
Region	% of All Pleasure Visitors	Number of Pleasure Visitors
Charlottetown	65%	590,395
Kensington, Cavendish	62%	561,602
Summerside	46%	420,840
Brudenell, Georgetown, Montague	37%	336,380
Gateway Village, Victoria by the Sea	35%	323,931
Tignish, Alberton, Mill River, O'Leary	26%	234,014
Mount Stewart, Crowbush	24%	217,083
Tyne Valley, Wellington, Miscouche	20%	178,621

**Multiple Responses Allowed*

Exhibit 7

Visitor Activities

The top five activities expressed by pleasure visitors who visited the province of Prince Edward Island during the 2004 tourism season are shown in Exhibit 8. They include sightseeing (68%), beach visits (63%), craft/ souvenir shopping (62%), visiting a national park (46%), and participating in driving tours (42%).

Pleasure Visitor Activities*	
Sightseeing	68%
Beach visits	63%
Craft/ souvenir shopping	62%
Visiting national park	46%
Driving tour	42%
Visiting Anne of Green Gables attractions	38%
Visiting historical/cultural attractions	38%
Shopping (general merchandise)	37%
Lobster suppers	35%
Visiting friends & relatives	27%
Canada's birthplace attractions	24%
Camping	21%
Confederation trail	20%
Fun/ theme parks	17%
Festivals/ events	16%
Hiking	15%
Founder's Hall	15%
Live theatre	14%
Harbour/ city/ land tours	14%
Bird watching	14%
Golf	14%
Nightlife	11%
Boating/ canoeing/ kayaking/ sailing	8%
Sports (participant)	7%
Cycling	7%
Deep sea/ salt water fishing	6%
Sports (spectator)	3%
Other	2%

*Multiple Responses Allowed

Exhibit 8

Average Length of Stay

Visitors were asked to identify how many nights they spent in PEI during their pleasure trip. On average, pleasure visitors spent 41% of their total trip nights in PEI, with an average length of stay of 4.2 nights. Exhibit 9 presents the average number of nights spent in PEI by visitor origin.

Average Length of Stay		
Visitor Origin	Percentage of Total Trip Nights Spent in PEI	Average Number of Nights Spent in PEI
Newfoundland and Labrador	46%	6.7
Nova Scotia	79%	3.7
New Brunswick	84%	3.4
Quebec	42%	3.6
Ontario	36%	4.4
Other Canada	26%	5.2
New England	63%	5.0
Mid Atlantic States	41%	4.8
Other US	21%	3.4
International	24%	4.3
Overall	41%	4.2

Exhibit 9

Accommodations

Eighty-six percent of pleasure visitors stayed in paid accommodations during their visit to Prince Edward Island in 2004. The main types of paid accommodations included hotel/motel/resort (33%), cabin/cottage (22%), and private campground or B & B/ Country Inn (9% each). Fourteen percent chose to stay in non-paid accommodations with friends and relatives (Exhibit 10).

Sixty-three percent of pleasure visitors who stayed in paid overnight accommodations made reservations prior to their arrival in Prince Edward Island. Slightly more than seven in ten visitors who made advance reservations did so by telephone (72%), followed distantly by email/Internet at 20%.

Main Type of Accommodation

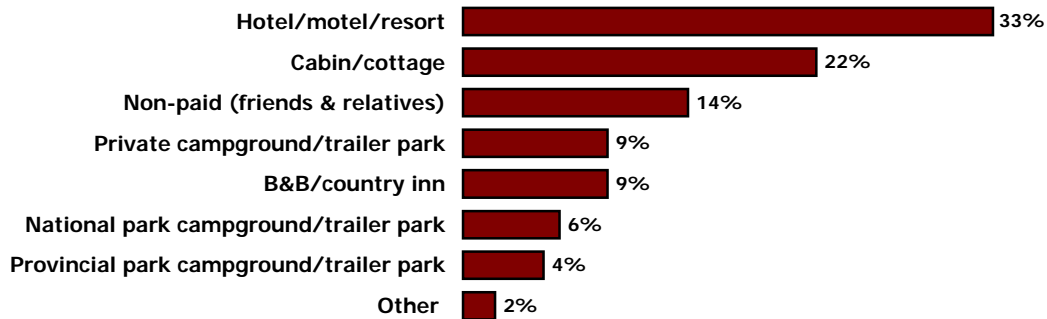


Exhibit 10

Method of Travel

The primary method of travel of pleasure visitors to Prince Edward Island during 2004 was private motor vehicles (90%), followed distantly by air (6%) and recreational vehicles (4%). Approximately 12% of those who indicated that they traveled to Prince Edward Island by private vehicle or recreational vehicle also indicated that they were on a fly/ drive vacation (i.e. fly to Nova Scotia, New Brunswick, or another airport and then rent a car to travel to PEI).

Timing of Decision to Visit Prince Edward Island

Pleasure visitors were asked to identify when they made their decision to visit PEI. Almost half (44%) of visitors made their decision to visit PEI more than 12 weeks in advance of their trip. Other visitors made their decisions less than 2 weeks prior (13%) and 3-4 weeks prior to their departure (12%) (Exhibit 11).

Timing of Decision to Visit PEI	
More than 12 weeks prior	44%
Less than 2 weeks prior	13%
3-4 weeks prior	12%
7-8 weeks prior	9%
11-12 weeks prior	7%
5-6 weeks prior	6%
Last minute decision	5%
9-10 weeks prior	4%
Don't know/ Can't remember	1%

Exhibit 11

The top three information sources used by pleasure visitors to Prince Edward Island in 2004 were Internet/PEI homepage/Tourism website (46%), PEI travel information (38%), and friends/relatives and co-workers (33%) (Exhibit 12).

Sources of Information*

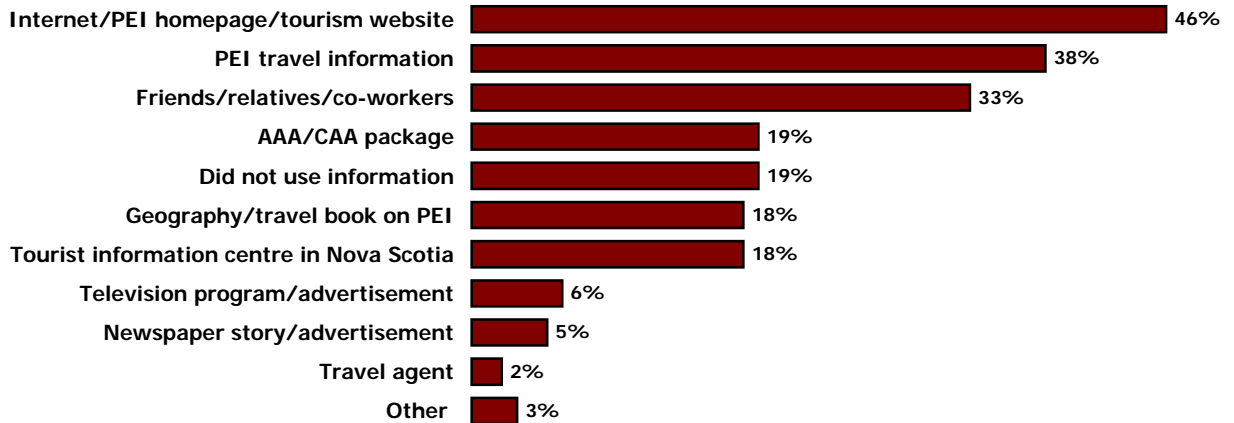


Exhibit 12

**Multiple Responses Allowed*

Travel Experience and Behavior

The majority (78%) of pleasure visitors to PEI reported taking a pleasure trip at least once during every year. Slightly more than six in ten (63%) pleasure visitors had previously visited the province, while 37% were first time visitors.

Repeat pleasure visitors to Prince Edward Island were asked about the timing of their last trip to the province. Exhibit 13 illustrates that, overall, 37% reported visiting the province during 2003, while one quarter visited the province more than five years ago.

Last Trip to Prince Edward Island

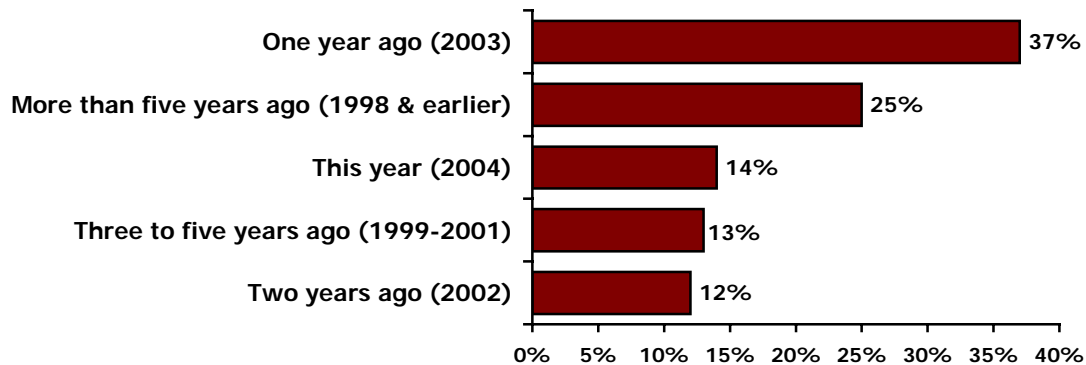


Exhibit 13

Satisfaction with Trip to Prince Edward Island

The majority of pleasure visitors to Prince Edward Island during the 2004 tourist season reported that the trip exceeded their expectations (39%) or met their expectations (59%). Only 2% indicated that the trip failed to meet their expectations.

Furthermore, 95% reported that after their visit to Prince Edward Island during 2004, they would consider returning to the province for a future pleasure trip.

Demographics

Exhibit 14 presents a demographic profile of 2004 pleasure visitors to PEI.

Visitor Demographics	
Age	
Under 40 years	22%
40-59 years	50%
60 years and older	28%
Household Income	
Less than \$35,000	9%
\$35,000-\$50,000	23%
More than \$50,000	68%
Highest Level of Education	
High school or less	25%
Some post secondary	12%
Community college	22%
Undergraduate degree	24%
Graduate/ post-graduate degree	17%
Employment Status	
Employed full-time	61%
Retired	27%
Employed part-time	7%

Exhibit 14

In 2004, the majority of pleasure visitors to Prince Edward Island were between the ages of 40 to 59 years (50%), or 60 and older (28%). The majority of pleasure visitors had an annual household income of more than \$50,000 (68%), and had at least some post-secondary education or training (75%). A significant proportion of pleasure visitors were employed full-time (61%), while 27% were retired.

Approximately 45% of pleasure visitors reported being a member of an auto club. As shown in Exhibit 15, among pleasure visitors, the most common auto clubs were CAA (24%) and AAA (14%).

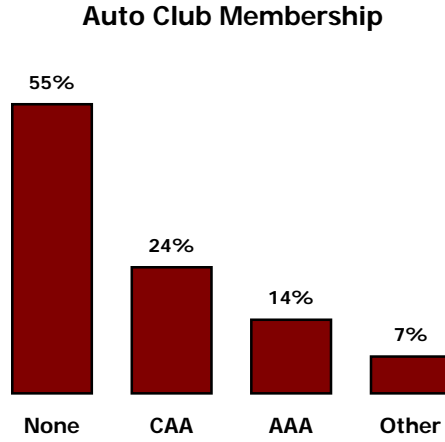


Exhibit 15

4.2 Section 2: Business Visitor Profile

The following section presents the results for business visitors to Prince Edward Island during the 2004 tourism season. For the purpose of this report, business visitors are defined as those visitors who exited the Island by air or private vehicle via Confederation Bridge, the Wood Island Ferry or Charlottetown Airport.

Visitor Origins

In 2004, there were 34,280 business parties that visited Prince Edward Island consisting of a total of 59,500 business visitors.

Business visitors to Prince Edward Island can be profiled using seven visitor origin markets: Newfoundland and Labrador, the Maritimes, Quebec, Ontario, Other Canada (AL, MB, SK, BC and the Territories), the US, and International. Exhibit 1 illustrates the market share for business visitors each origin market for the 2004 tourism season. By far, Nova Scotia and New Brunswick provided the largest market share of business visitors in 2004 (62%), followed by Ontario (27%).

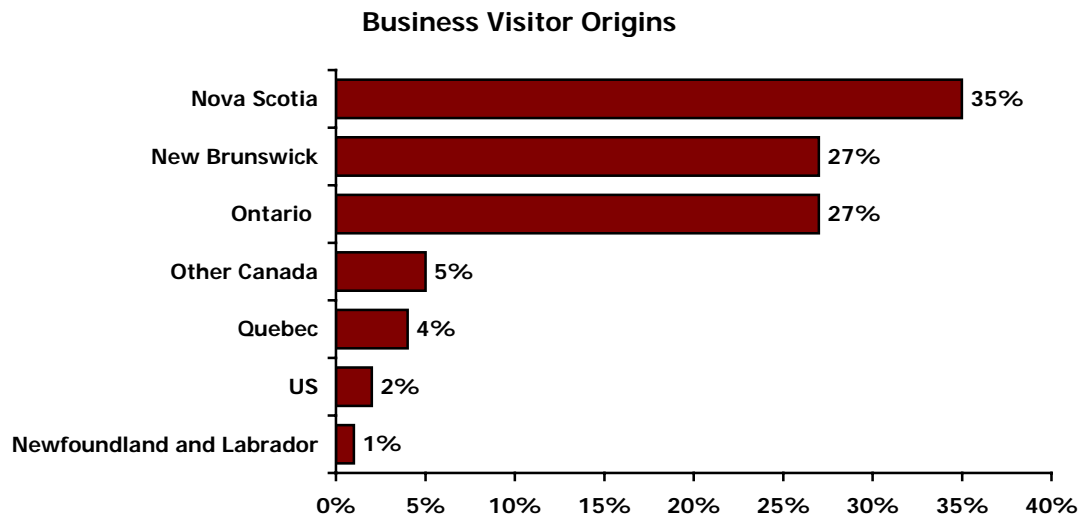


Exhibit 1

Visitor Expenditures

Overall, business visitor expenditures totaled \$21.8 million during the 2004 tourism season. Accommodations accounted for 39% of total business visitor expenditures, followed by meals (22%), auto expenses (10%), and other shopping expenses (8%) (Exhibit 2).

Business Visitor Expenditure Items

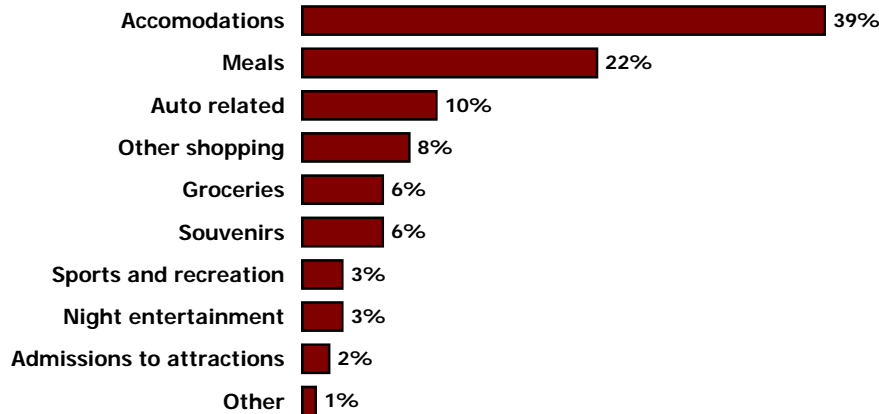


Exhibit 2

Party Composition and Size

The average party size for business visitors was 1.8 persons. Single travellers accounted for half of the business visitors to Prince Edward Island in 2004 (50%), while 26% were adults (one couple only), 17% were groups of friends/ adults traveling together, 6% were families with children under the age of 18, and 1% were adult couples (two or more) (Exhibit 3).

Party Composition

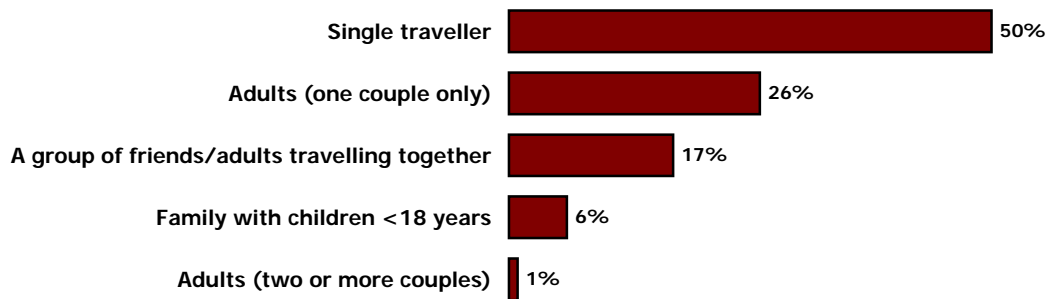


Exhibit 3

Main Reason for Visiting Prince Edward Island

As shown in Exhibit 4, the three main reasons business visitors made a business trip to Prince Edward Island in 2004 were to attend a meeting (27%), client/ customer service trip (25%), and convention (15%). The majority (88%) of business visitors to Prince Edward Island were repeat visitors, while 12% were first-time visitors.

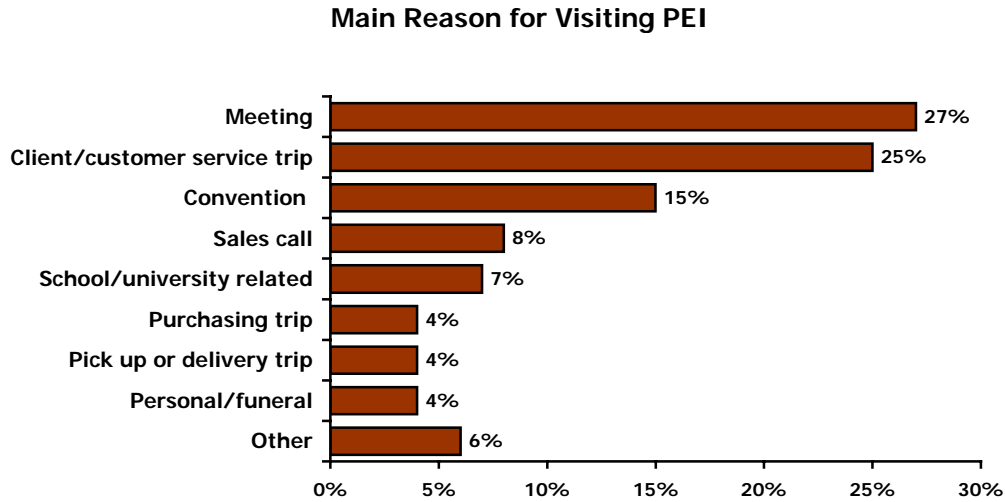


Exhibit 4

Main Overnight Destination

Business visitors were asked to identify their main overnight destination during their trip to Prince Edward Island. The main overnight destination for business visitors in 2004 was Charlottetown (59%), followed distantly by Summerside (12%) and Cavendish, Beaches, and the Dune Shore (9%) (Exhibit 5).

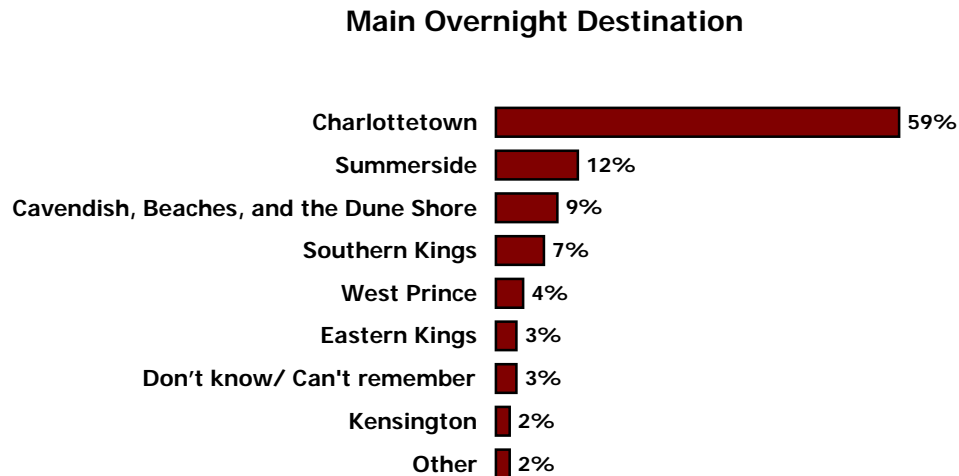


Exhibit 5

Visitor Activities

The main activities of business visitors to Prince Edward Island during 2004 included sightseeing (33%), business related activities only (31%), craft/ souvenir shopping (30%), lobster suppers (28%), and beach visits (23%) (Exhibit 6).

Business Visitor Activities*	
Sightseeing	33%
Business only	31%
Craft/ souvenir shopping	30%
Lobster suppers	28%
Beach visits	23%
Shopping (general merchandise)	22%
Driving tour	20%
Visiting historical/ cultural attractions	17%
Visiting friends & relatives	16%
Visiting national park	16%
Nightlife	15%
Canada's birthplace attractions	14%
Golf	14%
Founder's Hall	9%
Confederation trail	9%
Hiking	8%
Visiting Anne of Green Gables attractions	8%
Bird watching	7%
Harbour/ city/ land tours	6%
Experiencing Acadian culture	6%
Festivals/ events	5%
Boating/ canoeing/ kayaking/ sailing	5%
Fun/ theme parks	4%
Live theatre	4%
None	4%
Cycling	3%
Sports (participant)	3%
Camping	3%
Sports (spectator)	2%
Other	2%

*Multiple Responses Allowed

Exhibit 6

Accommodations

Overall, 94% of 2004 business visitors to Prince Edward Island chose to stay in paid accommodations. The majority (67%) of those who opted for paid accommodations stayed in a hotel/motel/resort, followed by a cabin/ cottage (13%), B & B/ Country Inn (5%), private campground/ trailer park (3%), university (2%), or a retreat house/ convent (2%) (Exhibit 7).

Eight in ten business visitors who stayed in paid accommodations during their 2004 trip to Prince Edward Island made advance reservations with the majority (69%) using the telephone to make these reservations. A further 15% made reservations via e-mail/ Internet, 13% had their reservations made by someone else, and 2% utilized a travel agent.

Main Type of Accommodation

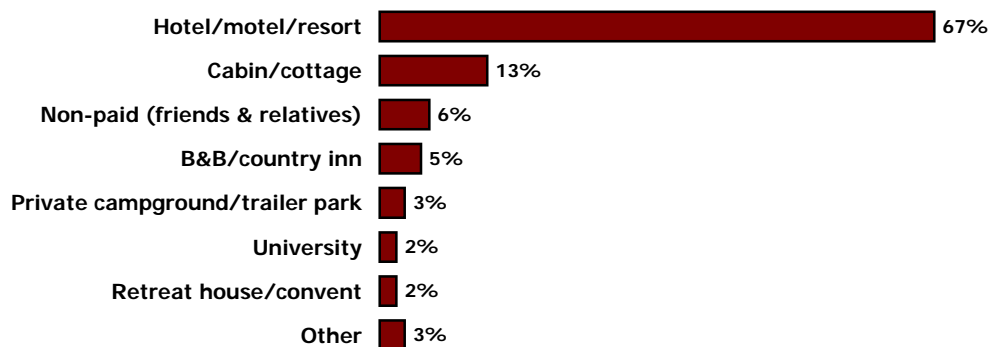


Exhibit 7

Method of Travel

Approximately three-quarters (77%) of 2004 business visitors to Prince Edward Island traveled to the province by a private motor vehicle, while the other 23% entered the province by air.

Travel Experience and Behavior

Overall, 88% of business visitors had previously visited PEI, while for 12%, it was their first trip to the province. Business visitors who reported that their trip to Prince Edward Island was a repeat visit were asked to identify when their last trip was to the province. As shown in Exhibit 8, most (49%) reported visiting the province in the same year (2004), while 21% visited one year ago (2003), while 30% visited two or more years ago.

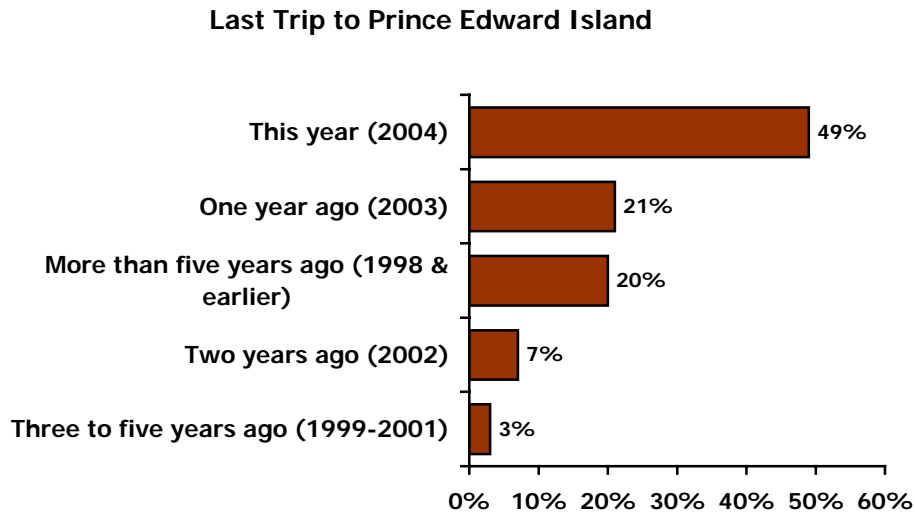


Exhibit 8

Demographics

Exhibit 9 presents a demographic profile of 2004 business visitors to PEI.

Visitor Demographics	
Age	
Under 40 years	23%
40-59 years	65%
60 years and older	12%
Household Income	
Less than \$35,000	3%
\$35,000-\$50,000	11%
More than \$50,000	86%
Highest Level of Education	
High school or less	20%
Some post secondary	11%
Community college	23%
Undergraduate degree	27%
Graduate/ post-graduate degree	19%
Employment Status	
Employed full-time	85%
Retired	8%
Employed part-time	4%
Average Number of Nights in PEI	2.8

Exhibit 9

The majority of 2004 business visitors were between the ages of 40-59 (65%), had an annual household income of more than \$50,000 (86%), possessed some level of post-secondary education (80%) and were employed full-time (85%). The average length of stay in PEI for business visitors was 2.8 nights.

4.3 Section 3: Motorcoach Visitor Profile

A 2004 survey of fixed-roof accommodations that hosted motorcoach visitors, supported by data collected by the 2004 Motorcoach Visitor Survey concluded that in 2004, 2.8% of all pleasure visitors to Prince Edward Island (an estimated 26,298 visitors) were motorcoach visitors. This represents a 2.9% decrease from 27,073 passengers in 2003 (Exhibit 1). These visitors stayed an average of 1.7 nights in Prince Edward Island, occupying an estimated 22,465 room nights. Total expenditures for motorcoach visitors totaled \$8.5 million.

In 2004, the actual number of motorcoaches that visited Prince Edward Island decreased by 2.9% from 752 to an estimated 730 coaches. There was a decrease of 2.9% in motorcoach visitors in 2004 and a slight decrease in the average party size from 2.3 in 2003 to 2.2 in 2004, the number of motorcoach parties increased 1.6% from 11,771 in 2003 to 11,954 in 2004 (Exhibit 2).

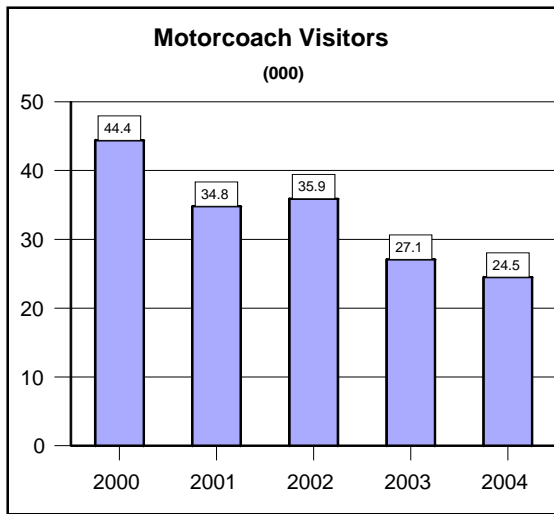


Exhibit 1

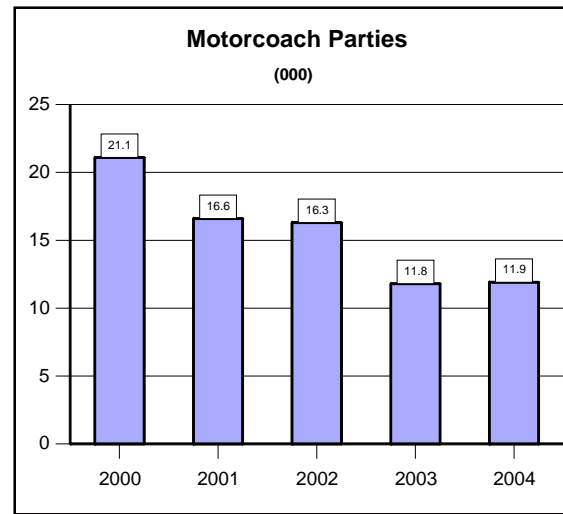


Exhibit 2

Expenditures by motorcoach visitors are estimated to have averaged \$380 per party night in 2004. Motorcoach visitors spent a total of 22,500 party nights in PEI resulting in total expenditures of \$8.5 million in 2004. It should be noted that changes in methodology to determine motorcoach expenditures were introduced in 2004. These changes prohibit comparison of expenditures with previous years.

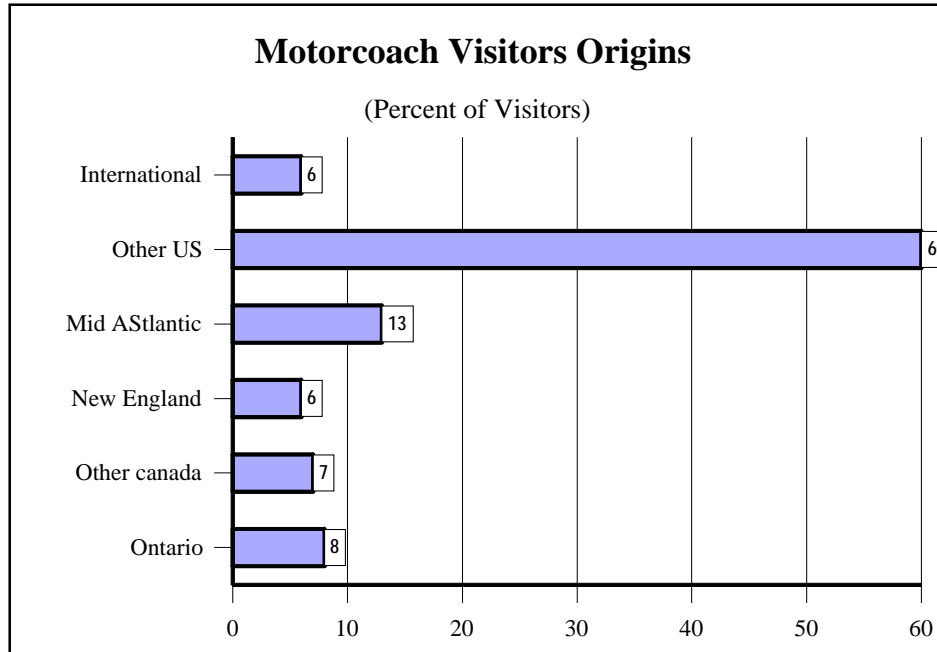


Exhibit 3

As indicated in Exhibit 3, survey results suggest that American origins continued to account for the lion's share of motorcoach visitations. In 2004, 80% of all motorcoach visitors that were surveyed were Americans, with the significant majority being from Other US (54%), New England (14%) and Mid-Atlantic (12%) states. The balance of motorcoach visitors were from, Ontario (8%), Quebec (6%), International (5%) and Other Canada (1%).

As shown in Exhibit 4, the main trip motives expressed by motorcoach visitors included sightseeing (87%), history/culture (75%), Anne/Lucy Maud attractions (59%) and observe nature (55%). A large majority (92%) of motorcoach visitors were first time visitors to Prince Edward Island (Exhibit 5).

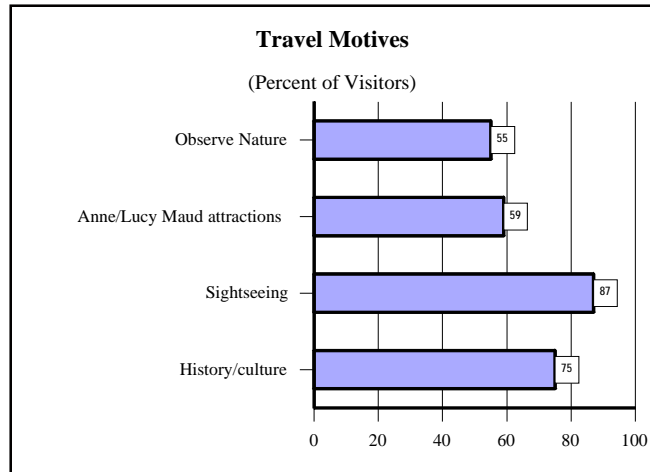


Exhibit 4

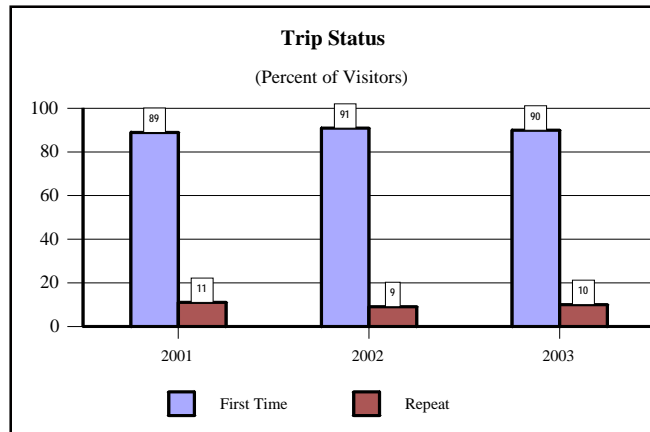


Exhibit 5

Motorcoach survey results suggest that the most popular tourism products included in Prince Edward Island motorcoach itineraries were visits to Anne of Green Gables house in Cavendish (90%), live theatre (69%), lobster suppers (64%), PEI Preserve Company (58%), tours of Charlottetown/Province House/Founders Hall (53%), beaches (44%) and other Anne of Green Gables attractions (36%).

In 2004, 99% of all motorcoach visitor parties to Prince Edward Island were comprised of adults. As outlined in Exhibit 6, 84% were a group of adults or couples traveling alone or with other couples, 15% were single travelers, and 1% were family with children less than 18 years of age. Motorcoach visitors tended to be seniors 60 years of age and older (78%), retired (62%) and had annual household incomes that were greater than \$50,000 (66%). Motorcoach visitors spent an average of 1.7 nights in Prince Edward Island during their 2004 trip.

Motorcoach Visitors Demographics			
	2002	2003	2004
Age			
Under 60 years	24%	34%	22%
60 years and older	76%	66%	78%
Employment Status			
Employed full-time	17%	23%	22%
Retired	68%	54%	62%
Other	15%	23%	16%
Party Composition			
Single travellers	14%	7%	15%
Adults/ couples	85%	91%	84%
Family with children <18 years	1%	2%	1%
Household Income			
Less than \$50,000	53%	47%	34%
More than \$50,000	47%	53%	66%
Average Number of Nights in PEI	1.9	1.9	1.7

Exhibit 6

4.4 Section 4: Japanese Visitor Profile

Visitation by Japanese visitors showed a major increase of 183% in 2004, and an increase of 162% in the number of Japanese parties from 2003, but still less than 2002 visitation levels. Total non-tour expenditures (expenditures on P.E.I. only) by Japanese visitors showed an increase of 73% from \$0.313 million in 2003 to \$0.540 million in 2004. (Exhibits 1-3). The total tour expenditures are estimated at \$2.17 million¹. Total expenditures by Japanese visitors (non-tour and tour expenditures) is estimated at \$2.71 million.

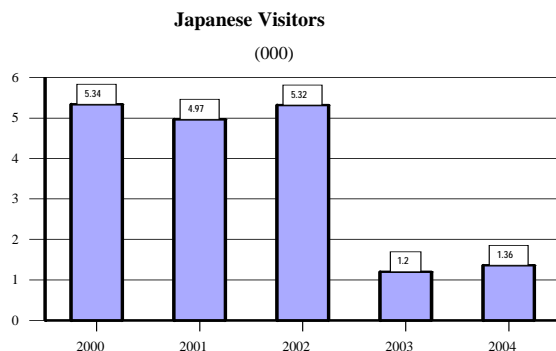


Exhibit 1

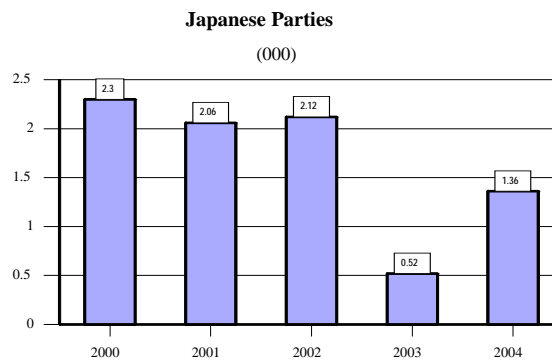


Exhibit 2

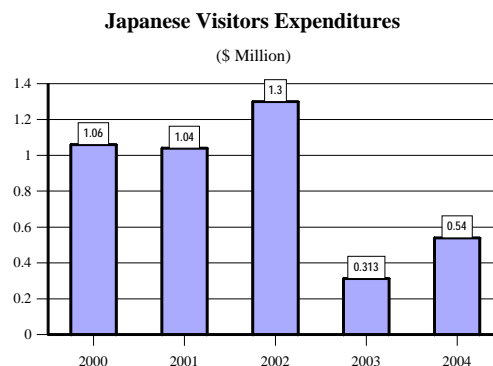


Exhibit 3

¹ PEI's share of tour costs do not include air travel costs and are calculated using PEI's share of trip nights (42%, Exhibit 5) and an average of a tour cost from Japan to the Atlantic Provinces. The average tour cost per person is \$1,550 (quoted by JTB International Tours). PEI's share of tour costs is estimated at \$637 per person.

In 2004, Japanese visitor party composition consisted of 37% adult couples, 46% group of friends, 15% families, and 2% single travellers.

Although Japanese average trip nights have decreased from 7.0 nights in 2003 to 6.5 nights in 2004 (Exhibit 4), Prince Edward Island's share of Japanese visitors trip nights has remained stable over the past few years (Exhibit 5).

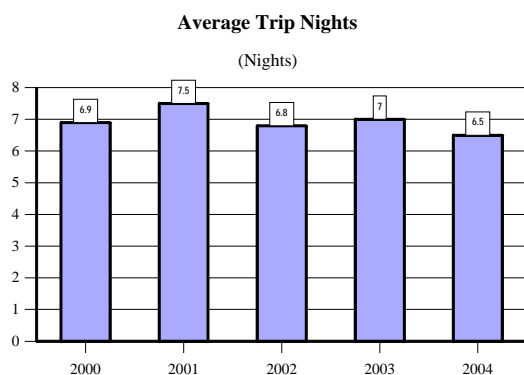


Exhibit 4

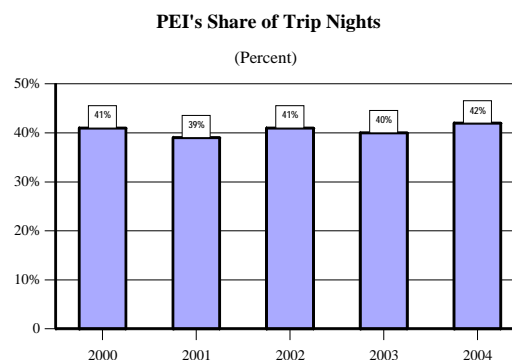


Exhibit 5

5 PRINCE EDWARD ISLAND’S TOURISM MARKETS

The following section presents a profile of pleasure visitor characteristics and behaviors for each of the ten origin markets.

5.1 Newfoundland and Labrador

Market Overview

During 2004, 4,942 pleasure parties visited Prince Edward Island from Newfoundland and Labrador consisting of 15,913 pleasure visitors. Total expenditures by pleasure visitors from this province amounted to \$7.1 million.

Main Reason for Visiting Prince Edward Island

The main reasons for visiting Prince Edward Island as expressed by pleasure visitors from Newfoundland and Labrador included visiting family/ friends/ relatives (27%), past experiences/ return visit to the province (17%), a getaway/ holiday (12%), and beaches (10%) (Exhibit 1).

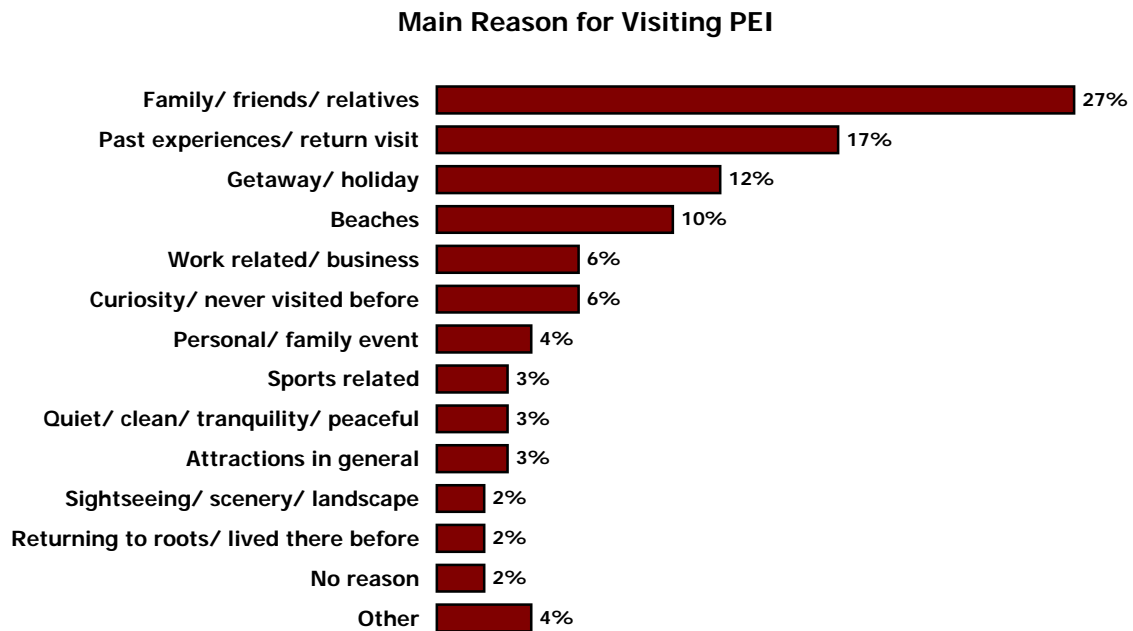


Exhibit 1

Past Visitation to Prince Edward Island

The majority of Newfoundland and Labrador pleasure visitors to Prince Edward Island were repeat visitors (64%), with the other 36% representing first-time visitors.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, almost one half (44%) of pleasure visitors from Newfoundland and Labrador made their decision to visit Prince Edward Island more than 12 weeks in advance of their trip. Further, 28% of pleasure visitors decided to visit PEI one to four weeks prior to their trip.

Timing of Decision to Visit PEI	
More than 12 weeks prior	44%
7-8 weeks prior	15%
3-4 weeks prior	14%
Less than 2 weeks prior	14%
9-10 weeks prior	5%
11-12 weeks prior	4%
5-6 weeks prior	2%
Last minute decision	2%

Exhibit 2

Party Composition

In terms of party composition (Exhibit 3), the majority (58%) of pleasure parties from Newfoundland and Labrador were families with children under 18 years of age. This was followed by adults (one couple only) (31%), groups of friends/ adults travelling together (7%), adults (two couples or more) and single travellers (2% each).

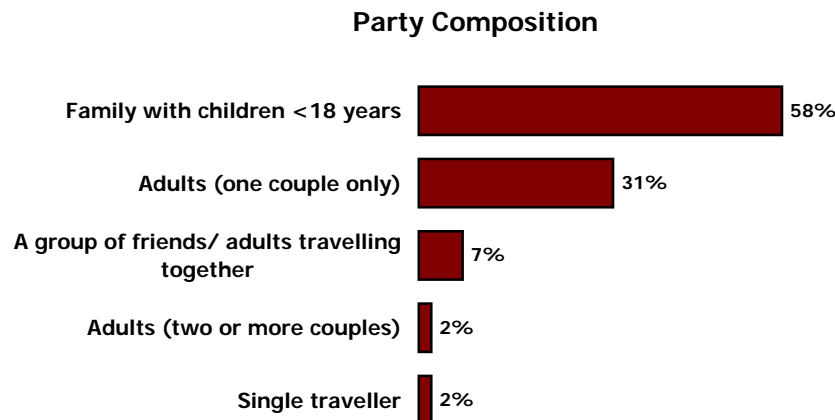


Exhibit 3

Demographics

Exhibit 4 presents a profile of Newfoundland and Labrador visitors. Almost half (48%) of pleasure visitors were between the ages of 40-49. Seventy-eight percent were employed on a full-time basis and just over a quarter of pleasure visitors (27%) had an annual household income greater than \$100,000. The average length of stay in Prince Edward Island was 6.7 nights.

Newfoundland and Labrador Visitor Profile	
Age	
20-29 years	3%
30-39 years	18%
40-49 years	48%
50-59 years	14%
60-69 years	15%
70 years and older	3%
Employment Status	
Employed full-time	78%
Retired	15%
Employed seasonally	3%
Unemployed	2%
Other	3%
Household Income	
\$20,000-\$35,000	9%
\$35,000-\$50,000	20%
\$50,000-75,000	14%
\$75,000-\$100,000	13%
More than \$100,000	27%
Refused	18%
Average Number of Nights in PEI	6.7

Exhibit 4

Main Overnight Destination

Major overnight destinations for Newfoundland and Labrador pleasure visitors were Cavendish, Beaches, and the Dune Shore (45%), Charlottetown (31%), and Southern Kings (13%) (Exhibit 5).

Main Overnight Destination

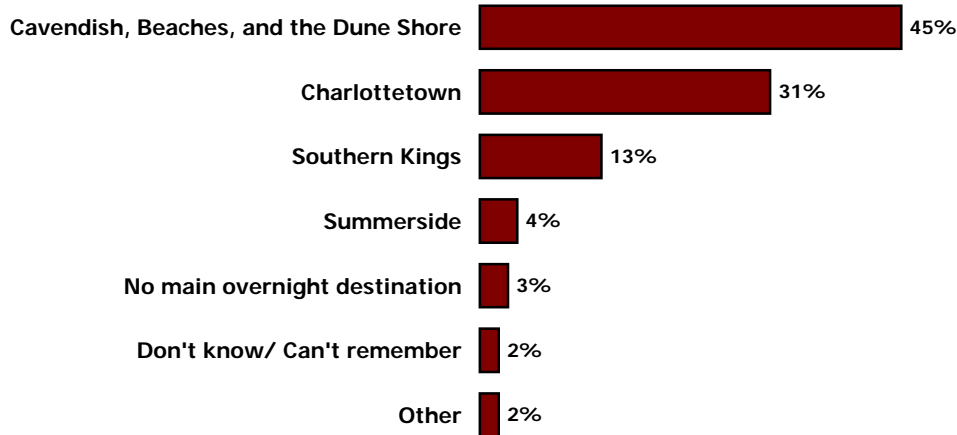


Exhibit 5

Main Overnight Accommodations

The majority (84%) of Newfoundland and Labrador pleasure visitors stayed in paid accommodations during their visit to Prince Edward Island. Hotels/ motels/ resorts represented the top paid overnight accommodation type (34%), followed by cabins/ cottages (30%). Sixteen percent of pleasure visitors chose to stay in unpaid accommodations with friends and relatives (Exhibit 6).

Main Type of Accommodation

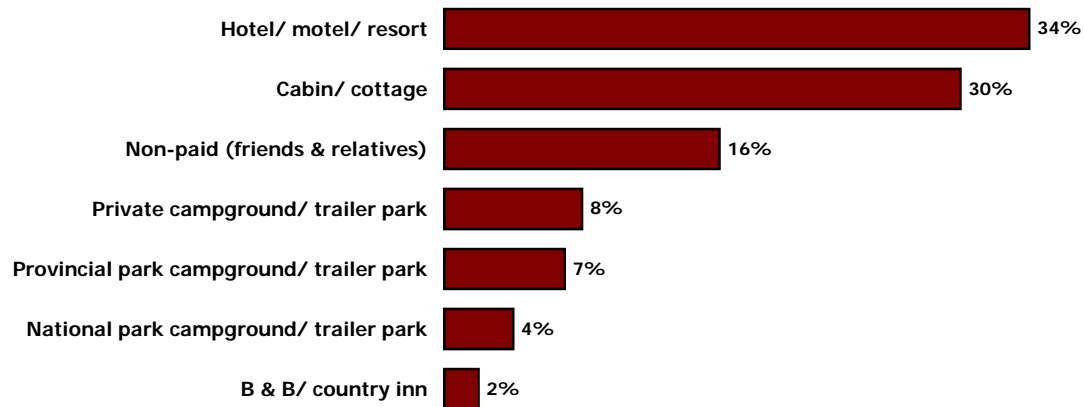


Exhibit 6

Visitor Activities

The most common activities for Newfoundland and Labrador pleasure visitors, as shown in Exhibit 7, included craft/ souvenir shopping (76%), sightseeing (68%), beach visits (64%), fun/ theme park visits (55%), and visiting a national park (47%).

Newfoundland and Labrador Visitor Activities*	
Craft/ souvenir shopping	76%
Sightseeing	68%
Beach visits	64%
Fun/ theme parks	55%
Visiting national park	47%
Visiting Anne of Green Gables attractions	46%
Visiting historical/ cultural attractions	41%
Visiting friends & relatives	40%
Shopping (general merchandise)	39%
Lobster suppers	35%
Driving tour	23%
Camping	21%
Confederation trail	20%
Festivals/ events	19%
Golf	17%
Experiencing Acadian culture	17%
Canada's birthplace attractions	16%
Harbour/ city/ land tours	11%
Live theatre	9%
Bird watching	7%
Nightlife	6%
Sports (spectator)	6%
Hiking	6%
Sports (participant)	5%
Founder's Hall	4%
Boating/ canoeing/ kayaking/ sailing	4%
Cycling	2%
Other	3%

* Multiple Responses Allowed

Exhibit 7

5.2 Nova Scotia

Market Overview

In 2004, 55,043 pleasure parties from Nova Scotia visited Prince Edward Island consisting of 172,835 pleasure visitors. Total expenditures for visitors from Nova Scotia were approximately \$35.3 million.

Main Reason for Visiting Prince Edward Island

Nova Scotia pleasure visitors expressed a variety of reasons for taking a pleasure trip to Prince Edward Island in 2004 with the two top reasons being to visit family/ friends/ relatives (24%), and past experiences/ return visit to the province (14%) (Exhibit 1).

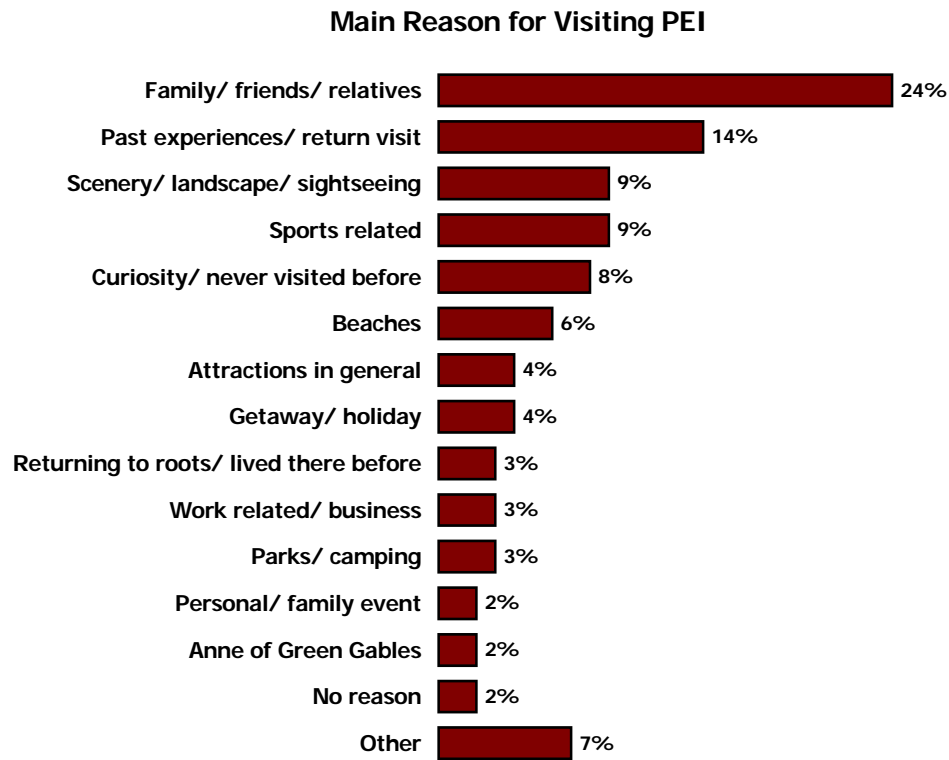


Exhibit 1

Past Visitation to Prince Edward Island

Slightly more than nine in ten (93%) pleasure visitors from Nova Scotia in 2004 had previously visited Prince Edward Island. The other 7% of visitors were first-time visitors.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, one quarter of Nova Scotia pleasure visitors made their decision to visit Prince Edward Island less than two weeks prior to their trip.

Timing of Decision to Visit PEI	
Less than 2 weeks prior	25%
More than 12 weeks prior	24%
3-4 weeks prior	21%
7-8 weeks prior	10%
Last minute decision	8%
5-6 weeks prior	6%
11-12 weeks prior	2%
9-10 weeks prior	2%
Don't know/ Can't remember	1%

Exhibit 2

Party Composition

Adults (one couple only) accounted for 41% of pleasure parties from Nova Scotia. A further 30% of Nova Scotia visitors consisted of families with children under the age of 18 (Exhibit 3).

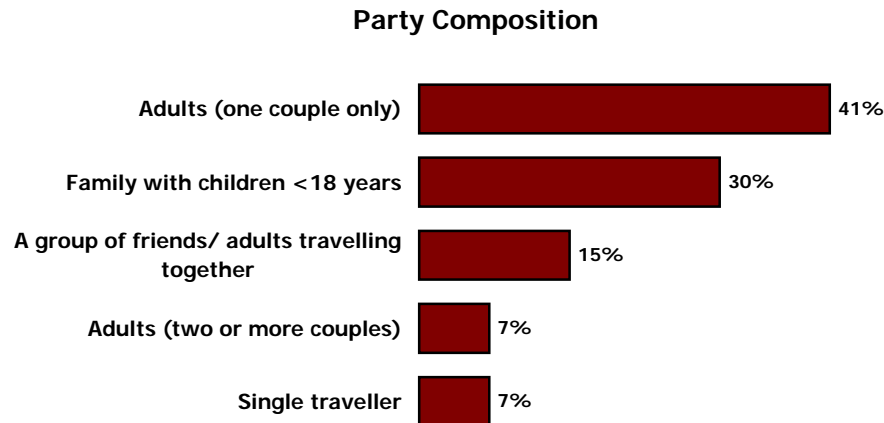


Exhibit 3

Demographics

In 2004, more than half of Nova Scotia pleasure visitors were between the ages of 40-59 (53%). Seven in ten were employed on a full-time basis and close to half (47%) had an annual household income between \$35,000 and \$75,000. Nova Scotia visitors spent an average of 3.7 nights in Prince Edward Island during their 2004 pleasure trip to the province (Exhibit 4).

Nova Scotia Visitor Profile	
Age	
20-29 years	8%
30-39 years	19%
40-49 years	29%
50-59 years	24%
60-69 years	14%
70 years and older	6%
Employment Status	
Employed full-time	70%
Retired	20%
Homemaker	4%
Employed part-time	3%
Unemployed	2%
Other	2%
Household Income	
Less than \$20,000	2%
\$20,000-\$35,000	8%
\$35,000-\$50,000	22%
\$50,000-\$75,000	25%
\$75,000-\$100,000	12%
More than \$100,000	11%
Refused	19%
Average Number of Nights in PEI	3.7

Exhibit 4

Main Overnight Destination

As shown in Exhibit 5, the majority (64%) of Nova Scotia pleasure visitors to Prince Edward Island identified their main overnight destination as Cavendish, Beaches, and the Dune Shore tourism region (40%), and Charlottetown tourism region (24%).

Main Overnight Destination

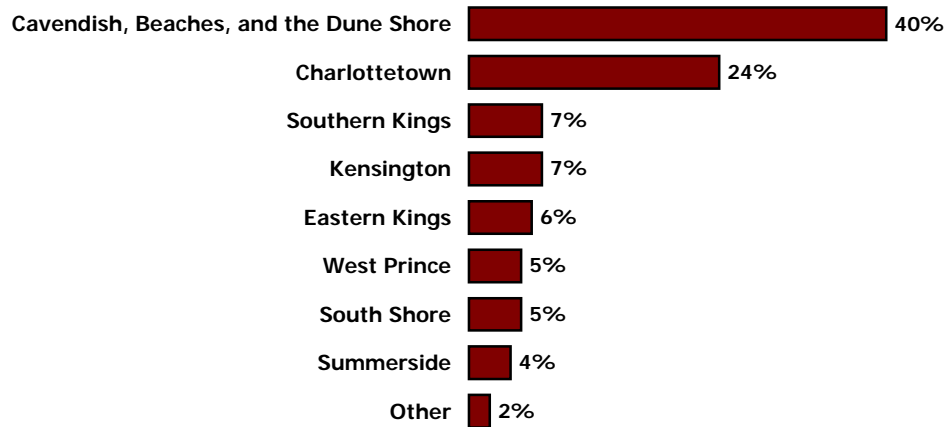


Exhibit 5

Main Overnight Accommodations

Exhibit 6 shows that approximately eight in ten (79%) Nova Scotia pleasure visitors stayed in paid accommodations while 21% stayed with friends and relatives in non-paid accommodations. The top three paid accommodations included cabins/ cottages (32%), hotels/ motels/ resorts (22%) and private campgrounds/ trailer parks (12%).

Main Type of Accommodation

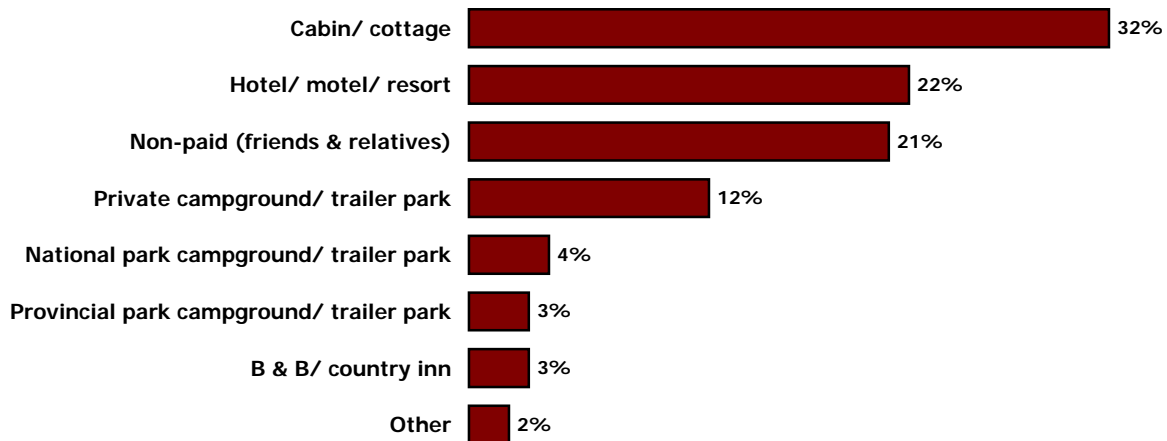


Exhibit 6

Visitor Activities

The top five activities for pleasure visitors from Nova Scotia in 2004 included sightseeing (52%), beach visits (50%), craft/ souvenir shopping (45%), shopping (43%), and visiting friends and relatives (37%) (Exhibit 7).

Nova Scotia Visitor Activities*	
Sightseeing	52%
Beach visits	50%
Craft/ souvenir shopping	45%
Shopping	43%
Visiting friends & relatives	37%
Visiting national park	30%
Driving tour	26%
Fun/ theme parks	22%
Visiting Anne of Green Gables attractions	21%
Visiting historical/ cultural attractions	20%
Camping	19%
Golf	18%
Lobster suppers	17%
Canada's birthplace attractions	15%
Festivals/ events	12%
Confederation trail	11%
Hiking	10%
Live theatre	8%
Experiencing Acadian culture	7%
Bird watching	7%
Sports (participant)	6%
Founder's Hall	6%
Cycling	6%
Boating/ canoeing/ kayaking/ sailing	5%
Harbour/ city/ land tours	4%
Nightlife	4%
Sports (spectator)	3%
Deep sea/ salt water fishing	2%
Other	4%

* Multiple Responses Allowed

Exhibit 7

5.3 New Brunswick

Market Overview

New Brunswick pleasure parties visiting Prince Edward Island in 2004 equaled 49,464. The number of pleasure visitors equaled 167,188. Total expenditures amounted to \$31.9 million.

Main Reason for Visiting Prince Edward Island

The main reasons for visiting Prince Edward Island as expressed by New Brunswick pleasure visitors in 2004 included visiting family/ friends/ relatives (22%), and past experiences/ return visit to the province (16%) (Exhibit 1).

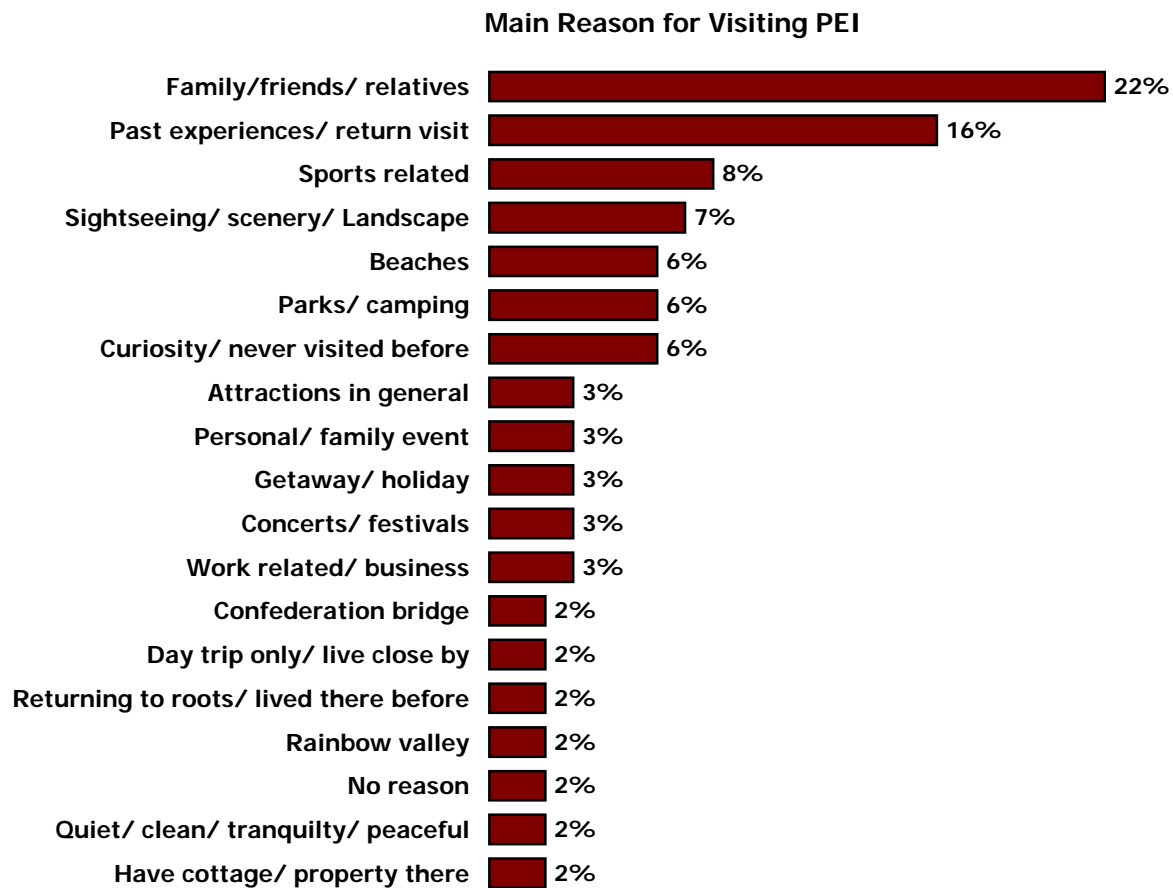


Exhibit 1

Past Visitation to Prince Edward Island

Only a minority (6%) of pleasure visitors from New Brunswick in 2004 were first-time visitors to the province with 94% reporting that they have visited Prince Edward Island in the past.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, 41% of 2004 New Brunswick pleasure visitors made their decision to visit Prince Edward Island between one and four weeks in advance of their pleasure trip.

Timing of Decision to Visit PEI	
More than 12 weeks prior	28%
Less than 2 weeks prior	21%
3-4 weeks prior	20%
7-8 weeks prior	9%
5-6 weeks prior	8%
11-12 weeks prior	5%
Last minute decision	5%
9-10 weeks prior	4%
Don't know/ Can't remember	1%

Exhibit 2

Party Composition

As Exhibit 3 shows, approximately eight in ten pleasure parties from New Brunswick were families with children under 18 years of age (49%) or adults (one couple only) (30%).

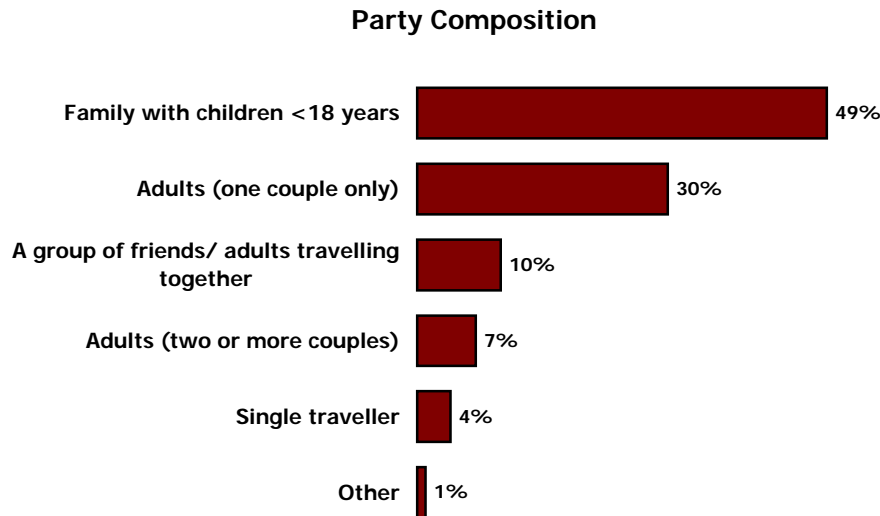


Exhibit 3

Demographics

As shown in Exhibit 4, the strong majority of pleasure visitors from New Brunswick were between the ages of 30 and 59 (80%). Seventy percent were employed on a full-time basis and 41% had annual household incomes between \$35,000 and \$75,000. The average length of stay in Prince Edward Island was 3.4 nights.

New Brunswick Visitor Profile	
Age	
20-29 years	7%
30-39 years	24%
40-49 years	32%
50-59 years	24%
60-69 years	10%
70 years and older	4%
Employment Status	
Employed full-time	70%
Retired	17%
Employed part-time	6%
Homemaker	2%
Unemployed	2%
Employed seasonally	2%
Household Income	
Less than \$20,000	3%
\$20,000-\$35,000	12%
\$35,000-\$50,000	20%
\$50,000-75,000	21%
\$75,000-\$100,000	12%
More than \$100,000	13%
Refused	19%
Average Number of Nights in PEI	3.4

Exhibit 4

Main Overnight Destination

Cavendish, Beaches, and the Dune Shore and Charlottetown were the main overnight destinations for pleasure visitors from New Brunswick (38% and 22% respectively) (Exhibit 5).

Main Overnight Destination

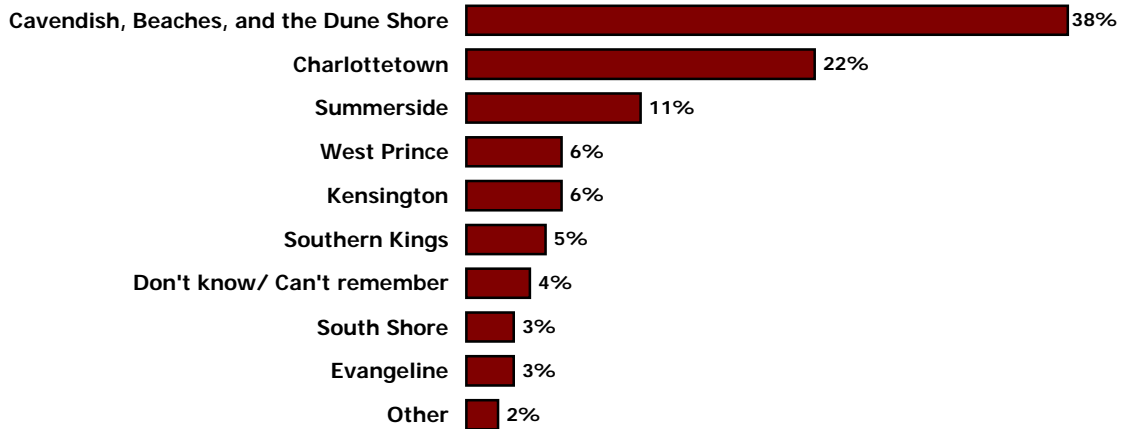


Exhibit 5

Main Overnight Accommodations

Eight-four percent of New Brunswick pleasure visitors to Prince Edward Island stayed in paid accommodations during their 2004 visit to the Island (Exhibit 6). The most common paid accommodation types were cabins/ cottages (30%), hotels/ motels/ resorts (24%), and private campground/ trailer parks (14%). Sixteen percent of pleasure visitors from New Brunswick chose to stay with friends and relatives.

Main Type of Accommodation

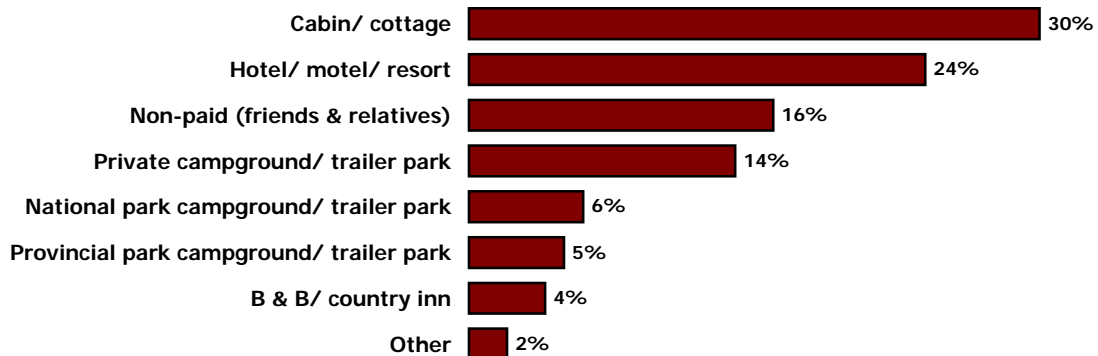


Exhibit 6

Visitor Activities

As shown in Exhibit 7, the most popular activities enjoyed by New Brunswick pleasure visitors were beach visits (54%), craft/ souvenir shopping (53%), sightseeing (49%), shopping (42%), and fun/theme parks (35%).

New Brunswick Visitor Activities*	
Beach visits	54%
Craft/ souvenir shopping	53%
Sightseeing	49%
Shopping	42%
Fun/ theme parks	35%
Visiting national park	34%
Visiting friends & relatives	31%
Driving tour	29%
Camping	26%
Visiting historical/ cultural attractions	25%
Visiting Anne of Green Gables attractions	21%
Lobster suppers	19%
Golf	16%
Festivals/ events	14%
Canada's birthplace attractions	14%
Experiencing Acadian culture	11%
Confederation trail	10%
Bird watching	10%
Hiking	9%
Sports (participant)	9%
Nightlife	9%
Harbour/ city/ land tours	8%
Live theatre	7%
Boating/ canoeing/ kayaking/ sailing	7%
Founder's Hall	5%
Sports (spectator)	5%
Deep sea/ salt water fishing	5%
Cycling	4%
None	2%
Other	2%

* Multiple Responses Allowed

Exhibit 7

5.4 Quebec

Market Overview

In 2004, 27,975 pleasure parties from Quebec visited Prince Edward Island consisting of 81,128 pleasure visitors. Total expenditures by pleasure visitors from this province amounted to \$25.5 million.

Main Reason for Visiting Prince Edward Island

In 2004, Quebec pleasure visitors to Prince Edward Island expressed a variety of reasons for visiting the province which are summarized in Exhibit 1. The primary reasons were curiosity/ never visited before (15%), beaches (14%), visiting family/ friends/ relatives and sightseeing/ scenery/ landscape (11% each).

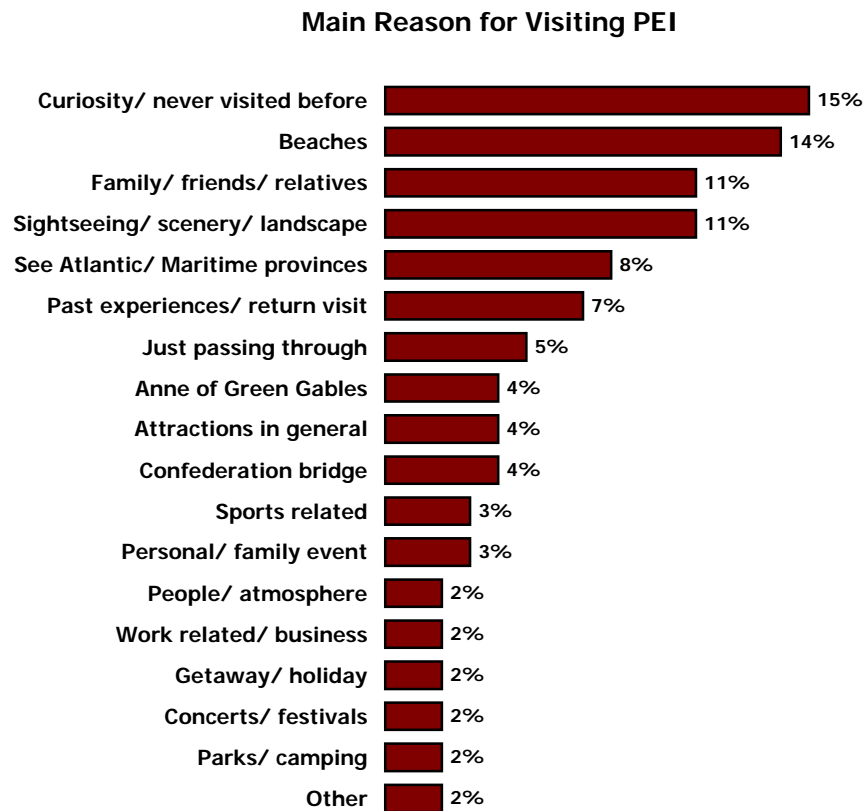


Exhibit 1

Past Visitation to Prince Edward Island

Just over half of the pleasure visitors to Prince Edward Island from Quebec were repeat visitors (55%). The other 45% of visitors indicated that this was their first trip to PEI.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, approximately half (49%) of Quebec pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks in advance of their trip. The remaining half decided to visit the Island 5-12 weeks prior (27%) or less than five weeks prior (24%).

Timing of Decision to Visit PEI	
More than 12 weeks prior	49%
Less than 2 weeks prior	16%
7-8 weeks prior	10%
5-6 weeks prior	9%
3-4 weeks prior	4%
11-12 weeks prior	4%
9-10 weeks prior	4%
Last minute decision	4%

Exhibit 2

Party Composition

In terms of party composition, 53% of pleasure parties from Quebec were adults (one couple only), followed by families with children under 18 years of age (29%), adults consisting of two or more couples (8%), groups of friends/ adults travelling together (7%) and single travellers (3%) (Exhibit 3).

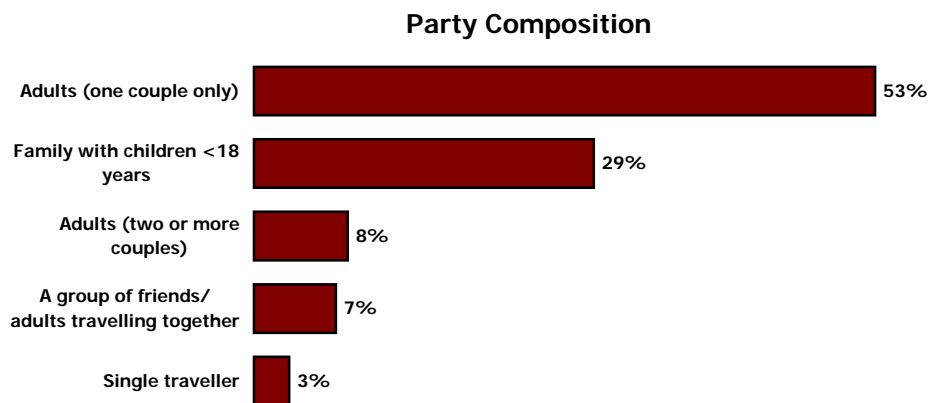


Exhibit 3

Demographics

A profile of Quebec visitors is presented in Exhibit 4. Almost one-half of pleasure visitors were between the ages of 50-69 (47%). Fifty-five percent were employed on a full-time basis, while 26% were retired. Overall, 69% of had annual household incomes of \$50,000 and over. Visitors from the Quebec region stayed in the province for an average of 3.6 nights.

Quebec Visitor Profile	
Age	
20-29 years	6%
30-39 years	22%
40-49 years	21%
50-59 years	24%
60-69 years	23%
70 years and older	3%
Refused	1%
Employment Status	
Employed full-time	55%
Retired	26%
Employed part-time	13%
Homemaker	2%
Retraining/ upgrading	2%
Other	3%
Household Income	
\$20,000-\$35,000	3%
\$35,000-\$50,000	17%
\$50,000-75,000	26%
\$75,000-\$100,000	22%
More than \$100,000	21%
Refused	12%
Average Number of Nights in PEI	3.6

Exhibit 4

Main Overnight Destination

Cavendish, Beaches, and the Dune Shore (37%) and Charlottetown (26%) were the main overnight destinations for Quebec pleasure visitors in 2004 (Exhibit 5).

Main Overnight Destination

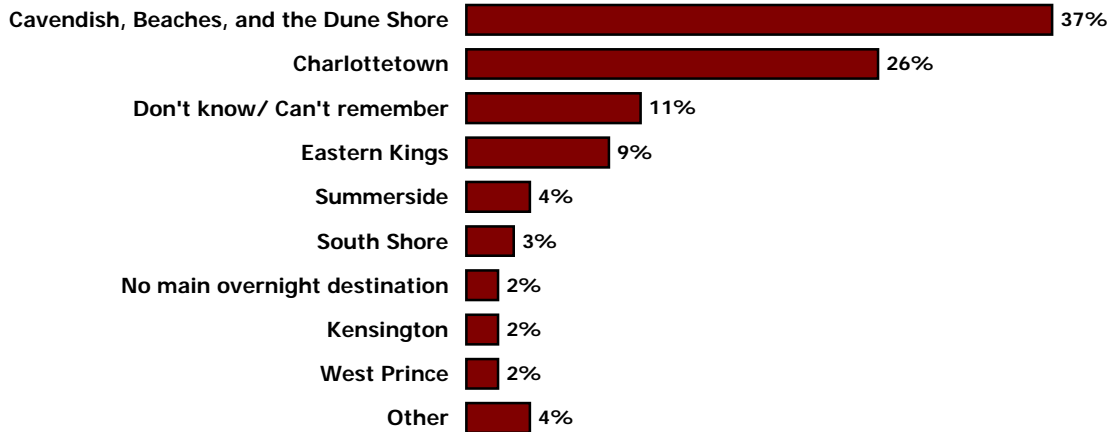


Exhibit 5

Main Overnight Accommodations

As Exhibit 6 shows, a minority (6%) of Quebec pleasure visitors stayed with family and friends in unpaid accommodations, while the strong majority stayed in paid accommodations. Hotels/ motels/ resorts represented the most popular paid accommodation type frequented by Quebec visitors (37%), followed by provincial park campgrounds/ trailer parks (12%), national park campgrounds/ trailer parks (12%), cabins/ cottages (11%), and private campgrounds/ trailer parks (10%).

Main Type of Accommodation

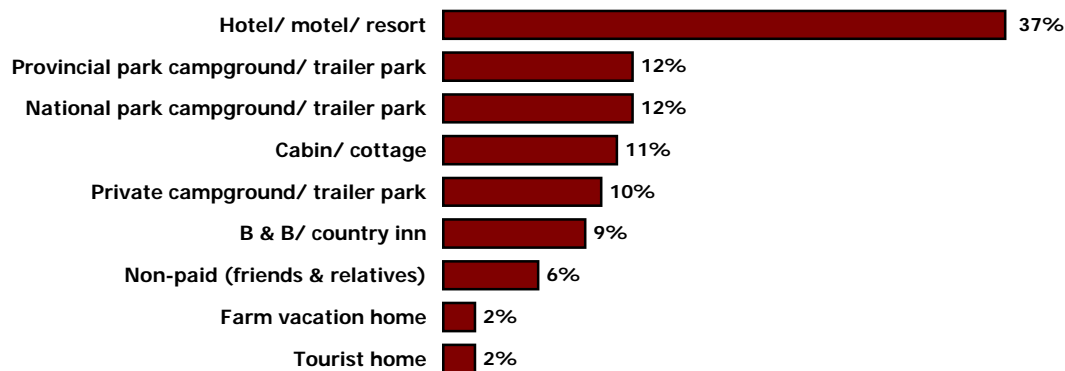


Exhibit 6

Visitor Activities

As shown in Exhibit 7, beach visits represented the most popular activity for Quebec pleasure visitors (67%), followed by sightseeing (63%), craft/ souvenir shopping (59%), visiting a national park (50%), and lobster suppers (44%).

Quebec Visitor Activities*	
Beach visits	67%
Sightseeing	63%
Craft/ souvenir shopping	59%
Visiting national park	50%
Lobster suppers	44%
Driving tour	40%
Visiting historical/ cultural attractions	37%
Shopping	35%
Visiting Anne of Green Gables attractions	35%
Camping	34%
Experiencing Acadian culture	32%
Canada's birthplace attractions	28%
Confederation trail	28%
Harbour/ city/ land tours	23%
Golf	20%
Founder's Hall	19%
Cycling	19%
Bird watching	16%
Hiking	15%
Festivals/ events	14%
Fun/ theme parks	14%
Nightlife	14%
Boating/ canoeing/ kayaking/ sailing	12%
Visiting friends & relatives	12%
Deep sea/ salt water fishing	10%
Live theatre	7%
Sports (participant)	6%
Horseback riding	2%
Other	1%

* Multiple Responses Allowed

Exhibit 7

5.5 Ontario

Market Overview

In 2004, 71,206 pleasure parties from Ontario visited Prince Edward Island. The number of pleasure visitors was 219,314, and total expenditures of pleasure visitors from this province was approximately \$69.5 million.

Main Reason for Visiting Prince Edward Island

Pleasure visitors from the province of Ontario visited Prince Edward Island in 2004 mainly to visit family/ friends/ relatives (19%), out of curiosity/ never visited before (18%), past experiences/ return visit (10%), and to see the Atlantic Provinces/ Maritimes (10%) (Exhibit 1).

Main Reason for Visiting PEI

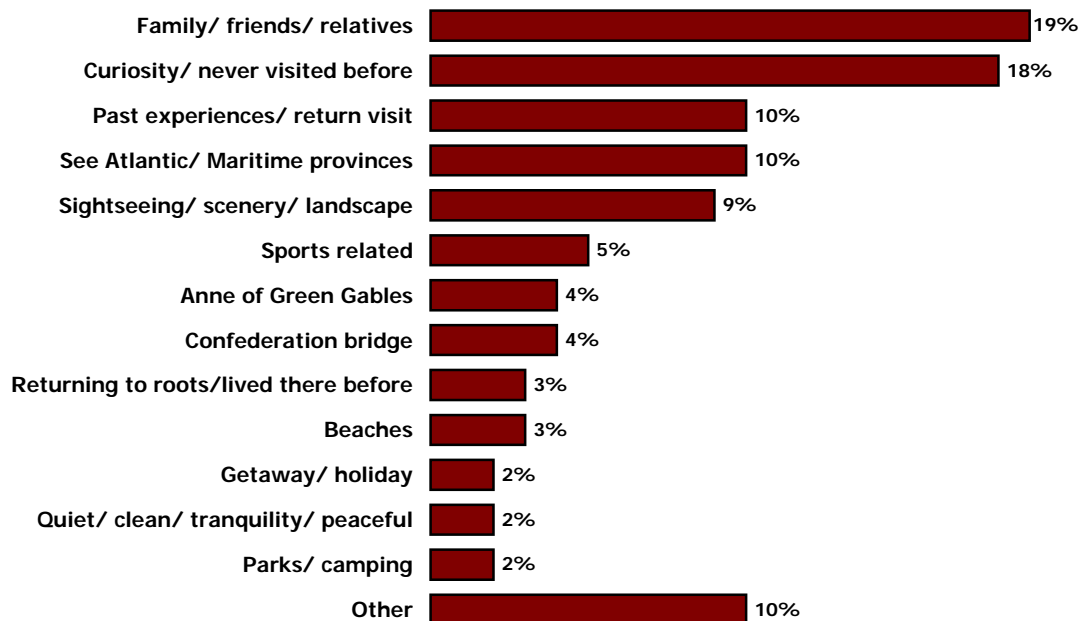


Exhibit 1

Past Visitation to Prince Edward Island

Just over half of the pleasure visitors from Ontario in 2004 had visited Prince Edward Island in the past (56%). The remaining 44% were first-time visitors to the province.

Timing of Decision to Visit Prince Edward Island

Approximately six in ten (58%) of Ontario pleasure visitors made their decision to visit Prince Edward Island at least 11 weeks prior to their trip (Exhibit 2).

Timing of Decision to Visit PEI	
More than 12 weeks prior	47%
11-12 weeks prior	11%
7-8 weeks prior	11%
3-4 weeks prior	9%
5-6 weeks prior	7%
9-10 weeks prior	5%
Less than 2 weeks prior	5%
Last minute decision	5%
Don't know/ Can't remember	1%

Exhibit 2

Party Composition

As shown in Exhibit 3, the majority of pleasure parties from Ontario were adults (one couple only) (44%) or families with children under 18 years of age (32%). The remaining 24% were either groups of friends/adults traveling together (10%), adult groups consisting of two or more couples (9%), single travellers (4%) or families with children under the age of 18 (1%).

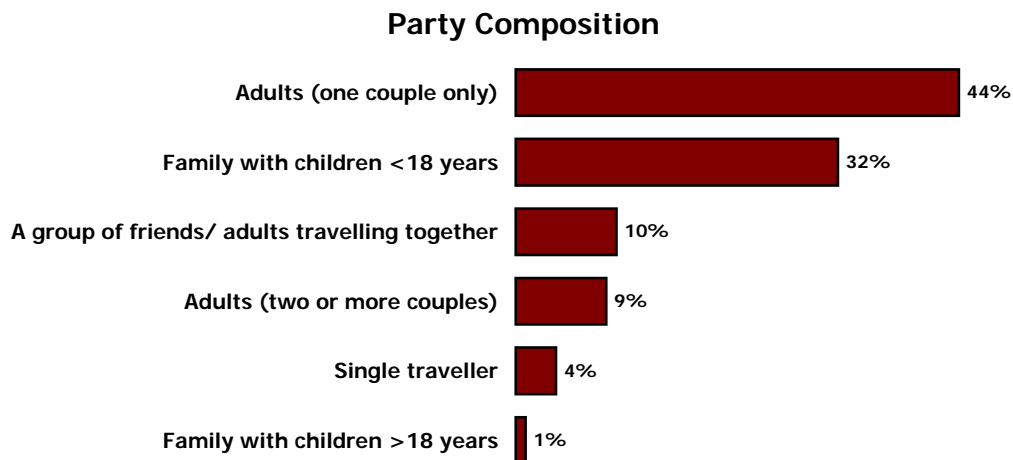


Exhibit 3

Demographics

In 2004, 50% of Ontario pleasure visitors were between the ages of 50-69. Six in ten were employed on a full-time basis, while three in ten were retired. Overall, 54% of visitors had annual household incomes of \$50,000 or over. Ontario visitors stayed an average of 4.4 nights in Prince Edward Island during their 2004 pleasure trip to the province (Exhibit 4).

Ontario Visitor Profile	
Age	
Under 20 years	1%
20-29 years	5%
30-39 years	16%
40-49 years	20%
50-59 years	28%
60-69 years	22%
70 years and older	9%
Employment Status	
Employed full-time	60%
Retired	31%
Employed part-time	4%
Unemployed	2%
Homemaker	2%
Student	2%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	4%
\$35,000-\$50,000	20%
\$50,000-75,000	18%
\$75,000-\$100,000	17%
More than \$100,000	19%
Refused	21%
Average Number of Nights in PEI	4.4

Exhibit 4

Main Overnight Destination

The majority of Ontario pleasure visitors reported the Cavendish, Beaches, and the Dune Shore tourism region (37%) or the Charlottetown tourism region (24%) as their main overnight destination while visiting Prince Edward Island in 2004 (Exhibit 5).

Main Overnight Destinations

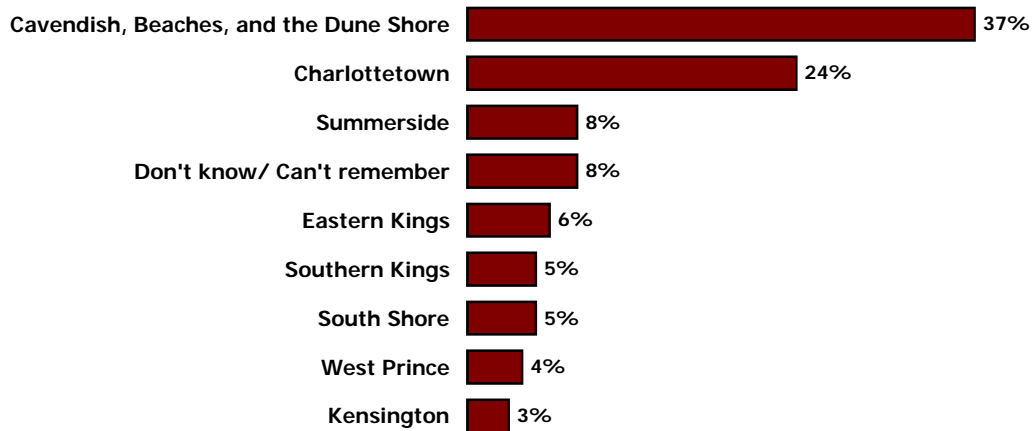


Exhibit 5

Main Overnight Accommodations

As shown in Exhibit 6, 15% of pleasure visitors from Ontario chose to stay with friends and relatives in non-paid accommodations during their 2004 pleasure trip to Prince Edward Island. For the 85% who stayed in paid accommodations, most either stayed in hotels/ motels/ resorts (37%), cabins/ cottages (18%) or B & B's/ Country Inn's (10%).

Main Type of Accommodation

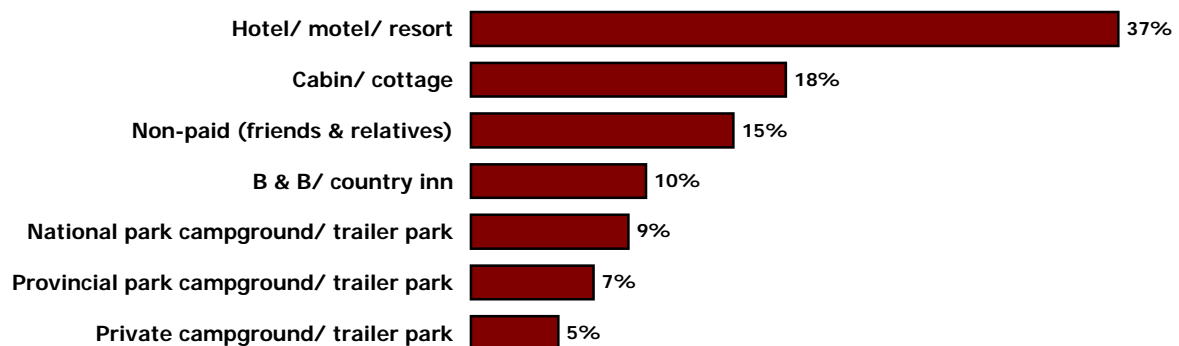


Exhibit 6

Visitor Activities

Sightseeing (77%) was the main activity enjoyed by Ontario visitors during their pleasure trip to Prince Edward Island in 2004. Other popular activities for visitors from this province included craft/ souvenir shopping (69%), beach visits (67%), visiting a national park (51%), and driving tours (49%) (Exhibit 7).

Ontario Visitor Activities*	
Sightseeing	77%
Craft/ souvenir shopping	69%
Beach visits	67%
Visiting national park	51%
Driving tour	49%
Lobster suppers	44%
Visiting Anne of Green Gables attractions	41%
Visiting historical/ cultural attractions	38%
Shopping (general merchandise)	30%
Visiting friends & relatives	28%
Canada's birthplace attractions	28%
Experiencing Acadian culture	26%
Camping	20%
Confederation trail	19%
Hiking	18%
Founder's Hall	18%
Festivals/ events	17%
Harbour/ city/ land tours	16%
Live theatre	15%
Bird watching	14%
Nightlife	14%
Golf	14%
Fun/ theme parks	11%
Deep sea/ salt water fishing	9%
Sports (participant)	8%
Boating/ canoeing/ kayaking/ sailing	7%
Cycling	5%
Other	4%

* Multiple Responses Allowed

Exhibit 7

5.6 Other Canada

Market Overview

Pleasure parties visiting Prince Edward Island from other locations in Canada in 2004 equaled 20,456, and the total number of pleasure visitors equaled 56,459. Total expenditures for Ontario pleasure visitors amounted to \$19.7 million.

Main Reason for Visiting Prince Edward Island

Pleasure visitors from other locations in Canada cited curiosity/ never visited before (23%), to visit family/ friends/ relatives (21%), and to see the Atlantic Provinces/ Maritimes (17%) as the main reasons for visiting the Island (Exhibit 1).

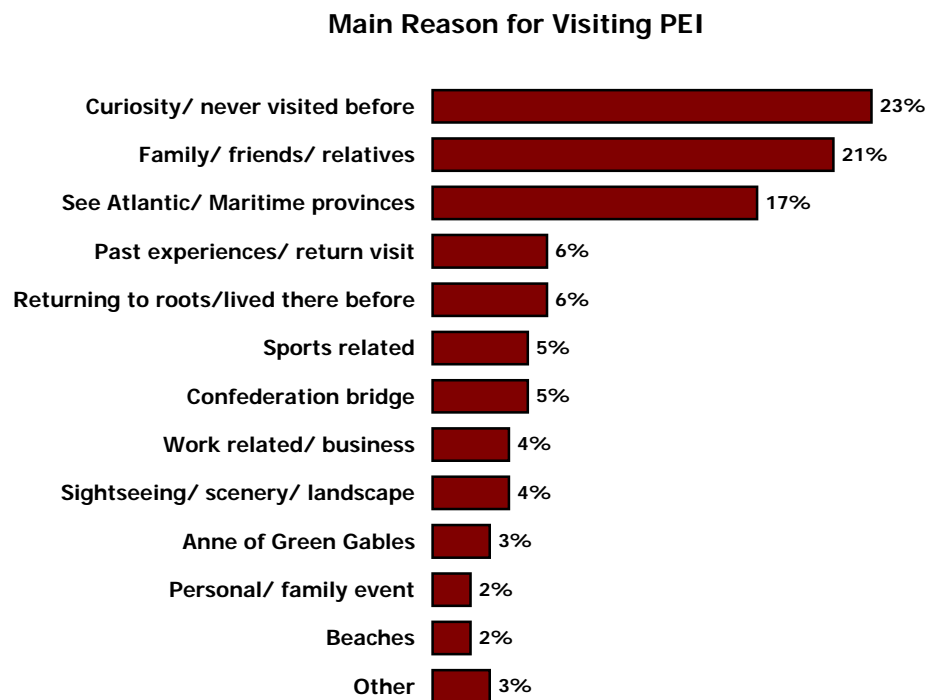


Exhibit 1

Past Visitation to Prince Edward Island

Approximately six in ten (59%) pleasure visitors from other locations in Canada had visited Prince Edward Island previously and the remaining 41% were first-time visitors to the province.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, the majority (65%) of pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks prior to visiting the province.

Timing of Decision to Visit PEI	
More than 12 weeks prior	65%
7-8 weeks prior	11%
11-12 weeks prior	7%
Less than 2 weeks prior	5%
5-6 weeks prior	4%
3-4 weeks prior	3%
9-10 weeks prior	2%
Last minute decision	2%

Exhibit 2

Party Composition

Exhibit 3 shows that the majority of pleasure parties from other Canadian locations were comprised of adults (one couple only) or families with children less than 18 years of age (46% and 21% respectively). This was followed by groups of friends/ adults traveling together (18%), single travellers (8%), and adults (two or more couples) (7%).

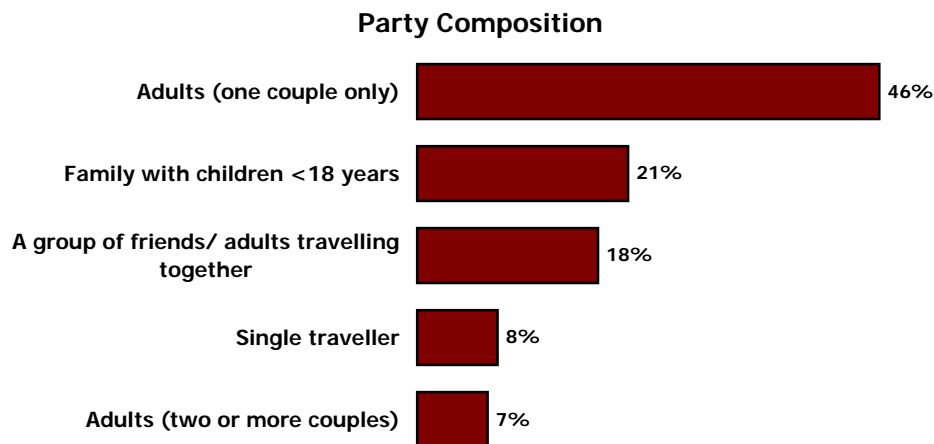


Exhibit 3

Demographics

Exhibit 4 presents a visitor profile of Other Canada visitors. Overall, 59% of pleasure visitors were between the ages of 40-59. Approximately six in ten (59%) were employed on a full-time basis and 45% had annual household incomes greater than \$75,000. The average length of stay in Prince Edward Island for these pleasure visitors was 5.2 nights.

Other Canada Visitor Profile	
Age	
20-29 years	10%
30-39 years	7%
40-49 years	28%
50-59 years	31%
60-69 years	17%
70 years and older	6%
Refused	1%
Employment Status	
Employed full-time	59%
Retired	24%
Employed part-time	9%
Homemaker	4%
Other	3%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	8%
\$35,000-\$50,000	11%
\$50,000-75,000	15%
\$75,000-\$100,000	20%
More than \$100,000	25%
Refused	21%
Average Number of Nights in PEI	5.2

Exhibit 4

Main Overnight Destination

As shown in Exhibit 5, the most popular overnight destinations for pleasure visitors from other Canadian locations were Charlottetown (45%), Cavendish, Beaches, and the Dune Shore (20%), and Summerside (12%).

Main Overnight Destination

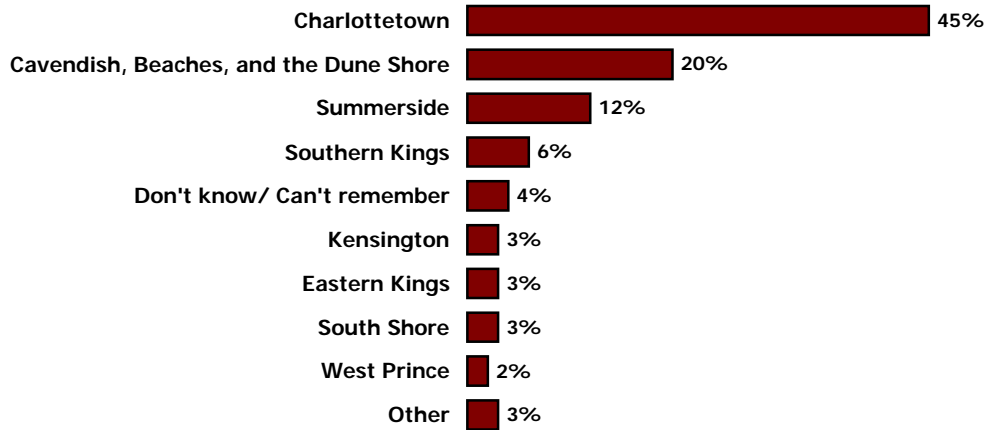


Exhibit 5

Main Overnight Accommodations

Eight in ten pleasure visitors from other areas in Canada stayed in paid accommodations during their 2004 visit to Prince Edward Island. Hotels/ motels/ resorts represented the most common paid accommodation type (42%), followed by B & B's/ Country Inn's (14%), and cabins/ cottages (11%) (Exhibit 6).

Main Type of Accommodation

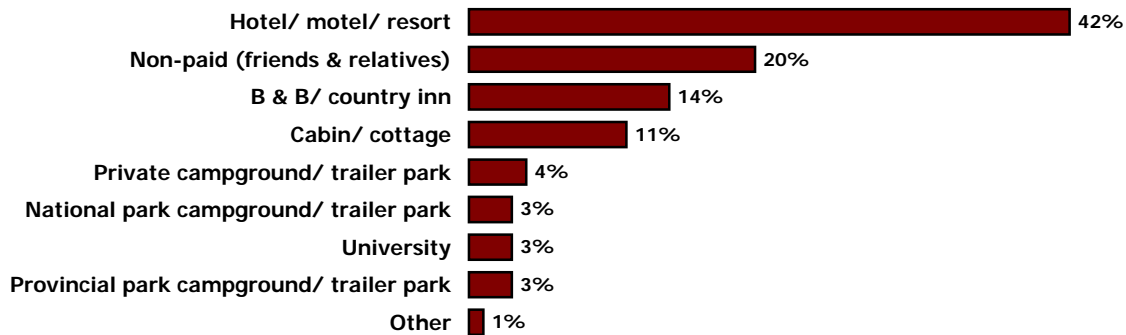


Exhibit 6

Visitor Activities

Exhibit 7 shows that the most common activities enjoyed by pleasure visitors from other Canadian locations included sightseeing (81%), craft/ souvenir shopping (78%), beach visits (72%), visiting a national park (59%), and visiting historical/ cultural attractions (59%).

Other Canada Visitor Activities*	
Sightseeing	81%
Craft/ souvenir shopping	78%
Beach visits	72%
Visiting national park	59%
Visiting historical/ cultural attractions	59%
Visiting Anne of Green Gables attractions	55%
Lobster suppers	53%
Driving tour	51%
Shopping	41%
Experiencing Acadian culture	40%
Canada's birthplace attractions	40%
Visiting friends & relatives	32%
Confederation trail	29%
Harbour/ city/ land tours	24%
Founder's Hall	24%
Nightlife	21%
Live theatre	19%
Festivals/ events	18%
Bird watching	18%
Camping	16%
Hiking	16%
Golf	14%
Fun/ theme parks	11%
Boating /canoeing/ kayaking/ sailing	8%
Deep sea/ salt water fishing	6%
Sports (participant)	5%
Sports (spectator)	3%
Cycling	2%
Other	1%

* Multiple Responses Allowed

Exhibit 7

5.7 New England

Market Overview

During 2004, 29,957 pleasure parties visited Prince Edward Island from New England consisting of approximately 87,175 visitors. Total expenditures by pleasure visitors from this area amounted to \$33.9 million.

Main Reason for Visiting Prince Edward Island

As Exhibit 1 shows, more than four in ten visitors from the New England region visited Prince Edward Island in 2004 as a result of past experiences/ return visit (22%) or to visit family/ friends/ relatives (22%). Other common reasons for visiting the province included curiosity/ never been there before (13%) and sightseeing/ scenery/ landscape (9%).

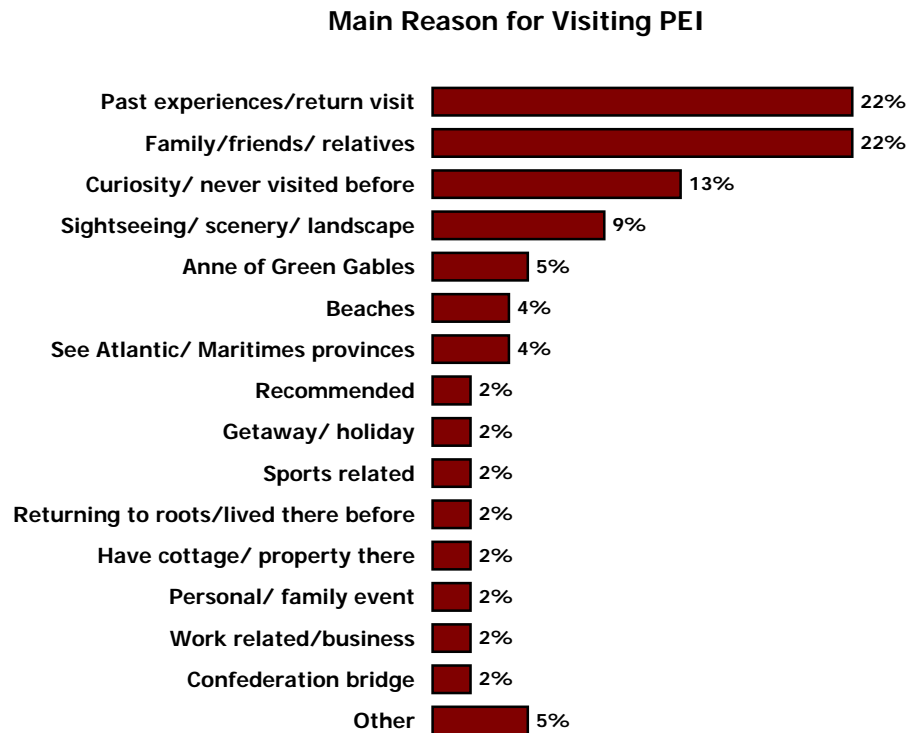


Exhibit 1

Past Visitation to Prince Edward Island

Just over half of pleasure visitors to Prince Edward Island from the New England region were repeat visitors (53%), while 47% visited Prince Edward Island for the first time in 2004.

Timing of Decision to Visit Prince Edward Island

Overall, one-half of New England pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks in advance of their trip. A smaller proportion of visitors made their decision less than 2 weeks in advance (10%) or 3-4 weeks in advance (10%) of their trip to Prince Edward Island (Exhibit 2).

Timing of Decision to Visit PEI	
More than 12 weeks prior	50%
Less than 2 weeks prior	10%
3-4 weeks prior	10%
7-8 weeks prior	9%
11-12 weeks prior	8%
5-6 weeks prior	6%
9-10 weeks prior	4%
Last minute decision	3%

Exhibit 2

Party Composition

In terms of party composition (Exhibit 3), slightly more than one-half of pleasure visitors from New England were adults (one couple only) (51%), followed by families with children under 18 years of age (24%).

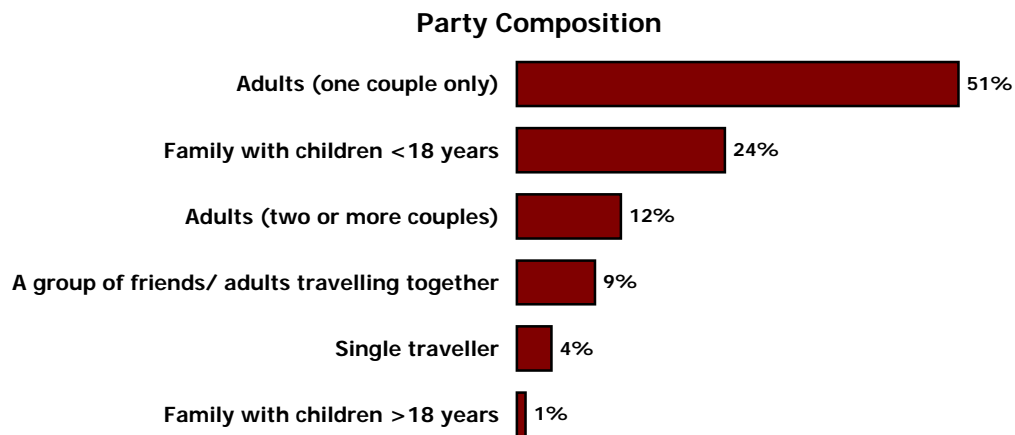


Exhibit 3

Demographics

A profile of New England visitors is presented in Exhibit 4. In total, fifty-seven percent of pleasure visitors from New England were between the ages of 50-69. Close to six in ten (58%) were employed on a full-time basis, while more than three in ten were retired. More than half of pleasure visitors had an annual household income of \$50,000 or more (59%). New England pleasure visitors spent an average of 5 nights in Prince Edward Island during their 2004 visit.

New England Visitor Profile	
Age	
20-29 years	1%
30-39 years	9%
40-49 years	21%
50-59 years	32%
60-69 years	25%
70 years and older	12%
Employment Status	
Employed full-time	58%
Retired	31%
Employed part-time	8%
Homemaker	2%
Other	2%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	3%
\$35,000-\$50,000	19%
\$50,000-75,000	24%
\$75,000-\$100,000	17%
More than \$100,000	18%
Refused	19%
Average Number of Nights in PEI	5.0

Exhibit 4

Main Overnight Destination

Exhibit 5 shows that the main overnight destinations for pleasure visitors from New England included Cavendish, Beaches, and the Dune Shore (28%) and Charlottetown (26%).

Main Overnight Destination

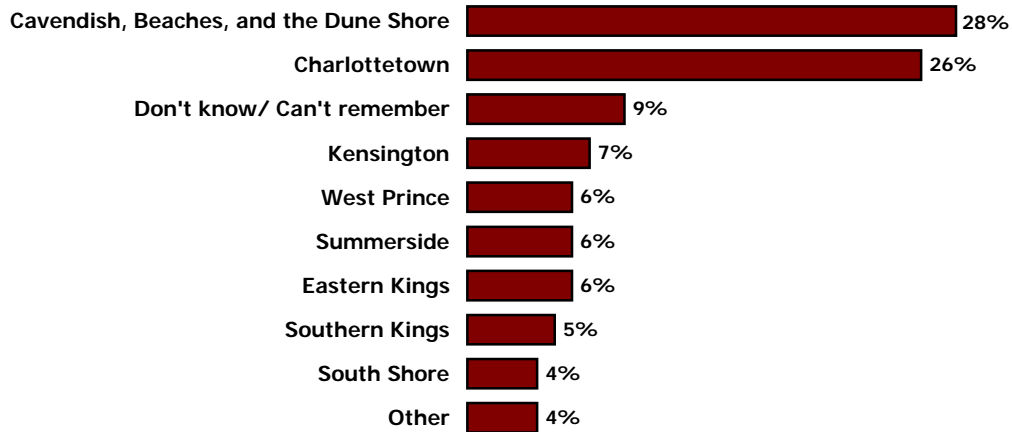


Exhibit 5

Main Overnight Accommodations

One in ten New England pleasure visitors to Prince Edward Island in 2004 stayed with friends and relatives in non-paid accommodations. Conversely, hotels/ motels/ resorts (34%), cabins/ cottages (26%), or private campgrounds/ trailer parks (10%) were the most common types of paid accommodations (Exhibit 6).

Main Type of Accommodation

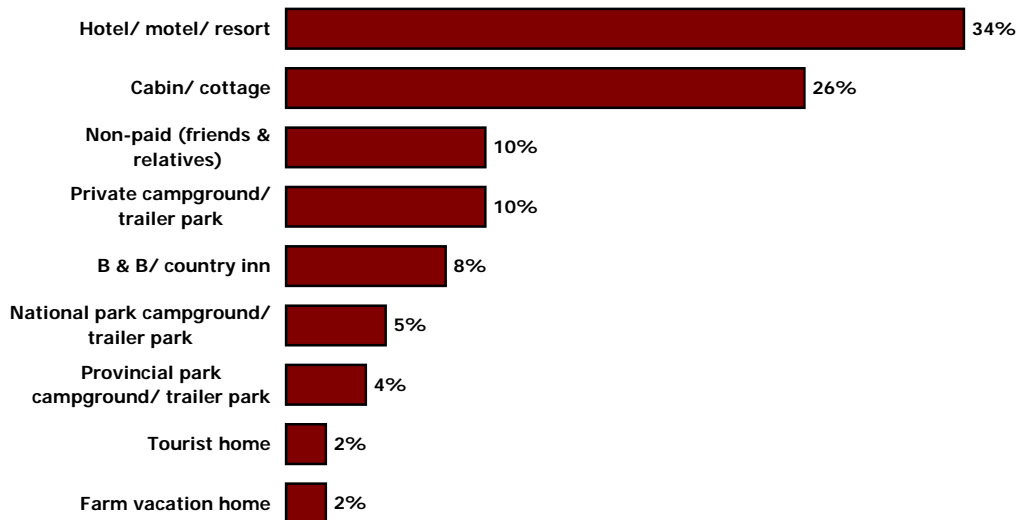


Exhibit 6

Visitor Activities

As shown in Exhibit 7, the most popular activities enjoyed by pleasure visitors from New England included sightseeing (82%), beach visits (73%), craft/ souvenir shopping (65%), visiting a national park (55%), and visiting historical/ cultural attractions (49%).

New England Visitor Activities*	
Sightseeing	82%
Beach visits	73%
Craft/ souvenir shopping	65%
Visiting national park	55%
Visiting historical/ cultural attractions	49%
Driving tour	48%
Visiting Anne of Green Gables attractions	46%
Experiencing Acadian culture	38%
Lobster suppers	38%
Shopping (general merchandise)	38%
Visiting friends & relatives	27%
Bird watching	25%
Confederation trail	24%
Canada's birthplace attractions	22%
Live theatre	22%
Festivals/ events	22%
Hiking	22%
Camping	18%
Harbour/ city/ land tours	16%
Founder's Hall	13%
Fun/ theme parks	12%
Nightlife	12%
Boating/ canoeing/ kayaking/ sailing	10%
Golf	10%
Cycling	9%
Deep sea/ salt water fishing	6%
Sports (participant)	6%
Sports (spectator)	3%
Other	3%

* Multiple Responses Allowed

Exhibit 7

5.8 Mid Atlantic

Market Overview

In 2004, 9,176 pleasure parties from the Mid Atlantic states visited Prince Edward Island. The number of pleasure visitors was 25,234 and total expenditures were \$9.9 million.

Main Reason for Visiting Prince Edward Island

The main reasons Mid Atlantic pleasure visitors vacationed in prince Edward Island during 2004 (Exhibit 1) included curiosity/ never visited before (25%), Anne of Green Gables (15%), visiting family/ friends/ relatives (12%), and past experiences/ return visit (10%).

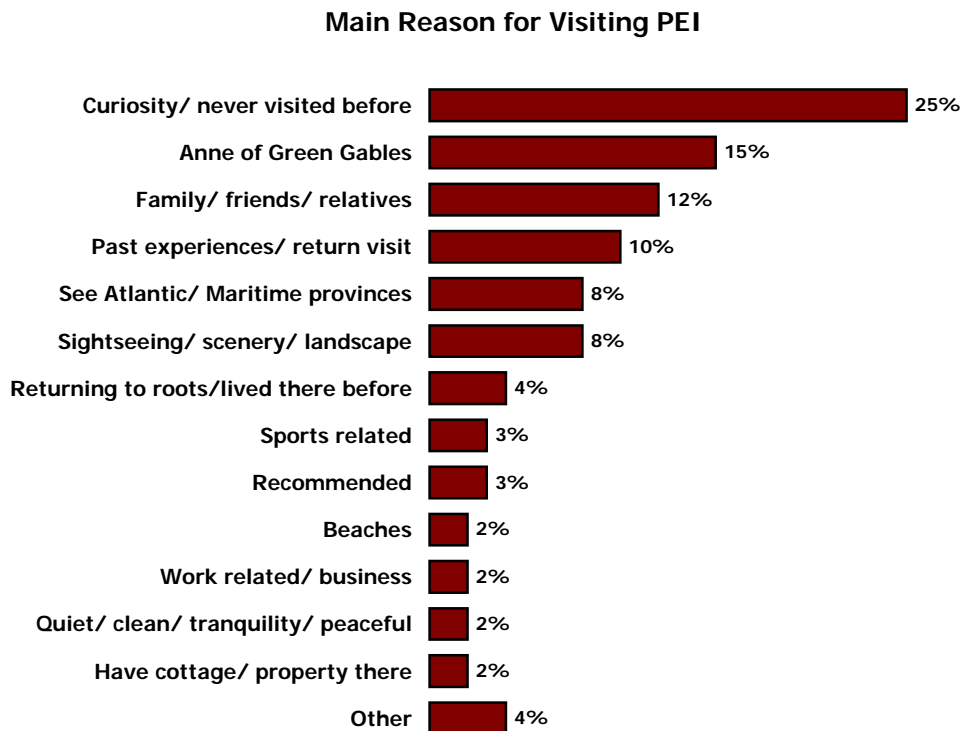


Exhibit 1

Past Visitation to Prince Edward Island

The large majority of pleasure visitors from the Mid Atlantic had been to Prince Edward Island during a prior visit (67%). The remaining visitors (33%) indicated that this was their first trip to PEI.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, the majority (53%) of Mid Atlantic pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks prior to their trip. For close to one quarter of visitors, the decision to visit the Island was made less than 5 weeks prior to the trip (23%).

Timing of Decision to Visit PEI	
More than 12 weeks prior	53%
11-12 weeks prior	10%
3-4 weeks prior	10%
7-8 weeks prior	9%
Less than 2 weeks prior	9%
5-6 weeks prior	4%
Last minute decision	4%
9-10 weeks prior	1%

Exhibit 2

Party Composition

Just over half (52%) of pleasure parties from the Mid Atlantic region were adults (one couple only). Families with children under 18 years of age comprised 23% of visiting parties followed by adults (two or more couples) (11%), single travellers (8%), and groups of friends/ adults traveling together (7%) (Exhibit 3).

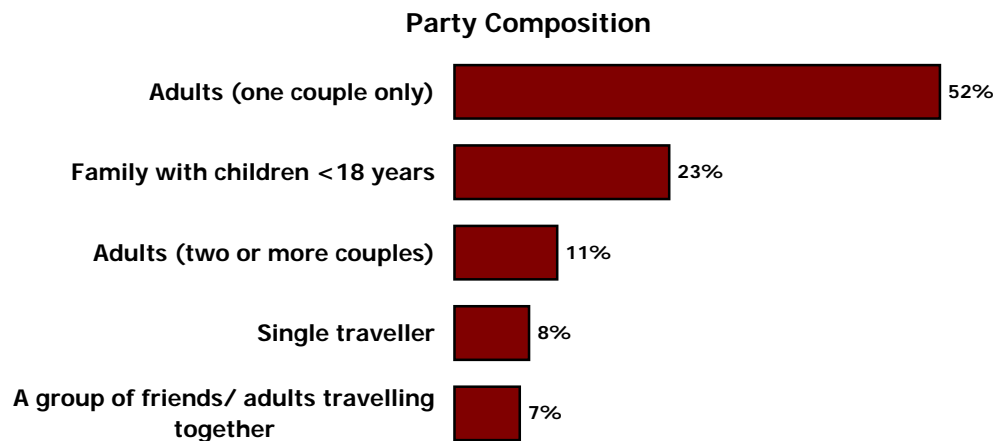


Exhibit 3

Demographics

A profile of Mid-Atlantic visitors is presented in Exhibit 4. Fully, 64% of visitors were between the ages of 50-69. Fifty-six percent were employed on a full-time basis, and 30% were retired. One-third of visitors had an annual household income greater than \$100,000. Mid Atlantic pleasure visitors spent an average of 4.8 nights in Prince Edward Island.

Mid Atlantic Visitor Profile	
Age	
20-29 years	2%
30-39 years	7%
40-49 years	16%
50-59 years	36%
60-69 years	28%
70 years and older	12%
Employment Status	
Employed full-time	56%
Retired	30%
Employed part-time	10%
Unemployed	3%
Other	2%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	4%
\$35,000-\$50,000	11%
\$50,000-75,000	23%
\$75,000-\$100,000	13%
More than \$100,000	33%
Refused	14%
Average Number of Nights in PEI	4.8

Exhibit 4

Main Overnight Destination

The most common primary overnight destinations for pleasure visitors from the Mid Atlantic area included Charlottetown (36%), Cavendish, Beaches, and the Dune Shore (20%), and Southern Kings (11%) (Exhibit 5).

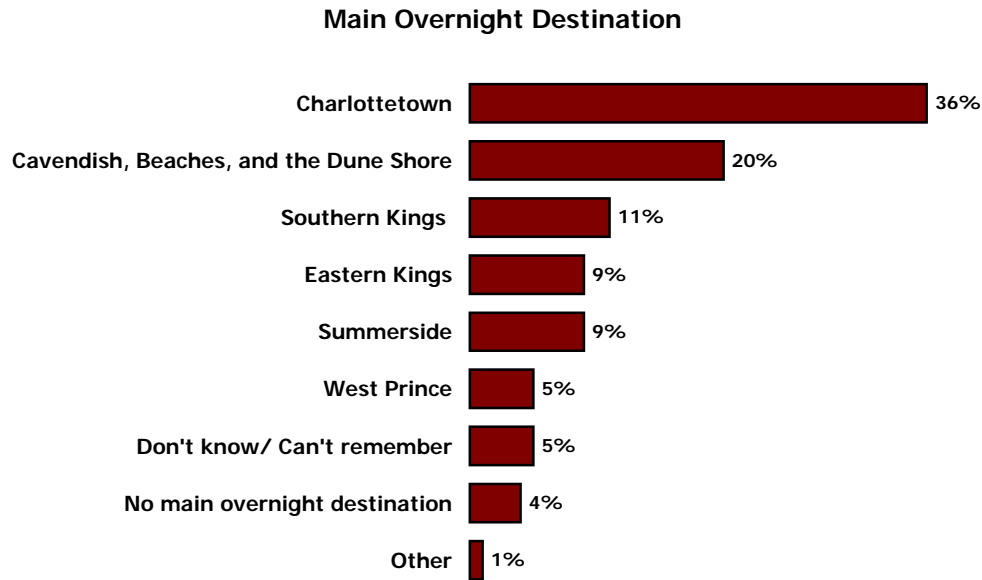


Exhibit 5

Main Overnight Accommodations

As shown in Exhibit 6, the strong majority (94%) of Mid Atlantic pleasure visitors stayed in paid accommodations, while 6% stayed in non-paid accommodations with friends and relatives. The main paid accommodation types included hotels/ motels/ resorts (40%), B & Bs/ Country Inns (21%), and cabins/ cottages (16%).

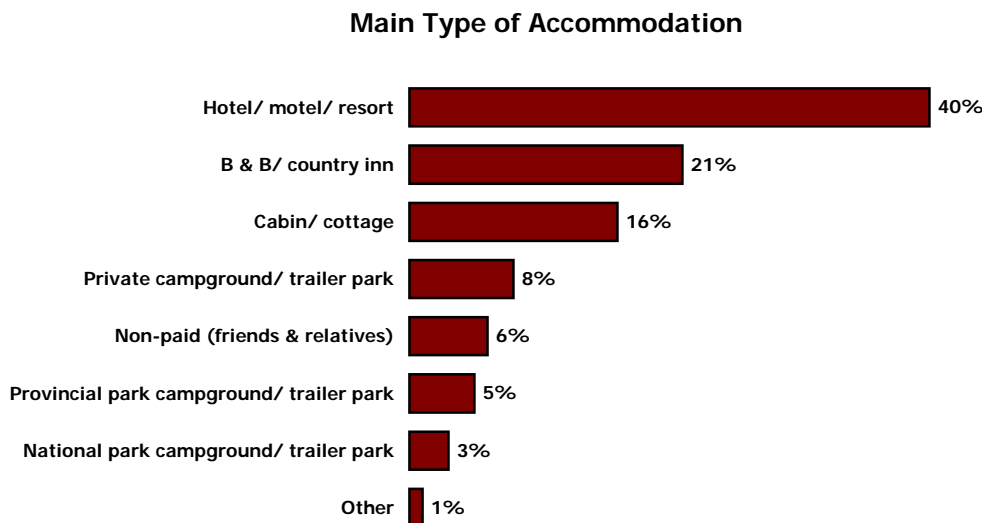


Exhibit 6

Visitor Activities

The top five activities for pleasure visitors from the Mid Atlantic states (Exhibit 7) included sightseeing (84%), beach visits (69%), craft/ souvenir shopping (65%), driving tours (55%), and visiting a national park (53%).

Mid Atlantic Visitor Activities*	
Sightseeing	84%
Beach visits	69%
Craft/ souvenir shopping	65%
Driving tour	55%
Visiting national park	53%
Visiting historical/ cultural attractions	52%
Visiting Anne of Green Gables attractions	51%
Lobster suppers	41%
Shopping	38%
Experiencing Acadian culture	34%
Confederation trail	32%
Bird watching	26%
Hiking	25%
Harbour/ city/ land tours	25%
Canada's birthplace attractions	25%
Festivals/ events	25%
Visiting friends & relatives	24%
Live theatre	22%
Founder's Hall	21%
Camping	14%
Cycling	13%
Golf	13%
Nightlife	13%
Boating/ canoeing/ kayaking/ sailing	11%
Fun/ theme parks	5%
Sports (participant)	5%
Deep sea/ salt water fishing	3%
Other	3%

* Multiple Responses Allowed

Exhibit 7

5.9 Other United States

Market Overview

There were 25,047 pleasure parties from the other US areas that visited Prince Edward Island in 2004. The number of pleasure visitors from this area equaled 67,627. Total expenditures amounted to \$20.1 million.

Main Reason for Visiting Prince Edward Island

The main reasons for visiting Prince Edward Island expressed by pleasure visitors from other states in the US included curiosity/ never visited before (24%), Anne of Green Gables (16%), to see the Atlantic Provinces/ Maritimes (12%), to visit family/ friends/ relatives (12%), and past experiences/ return visit (10%) (Exhibit 1).

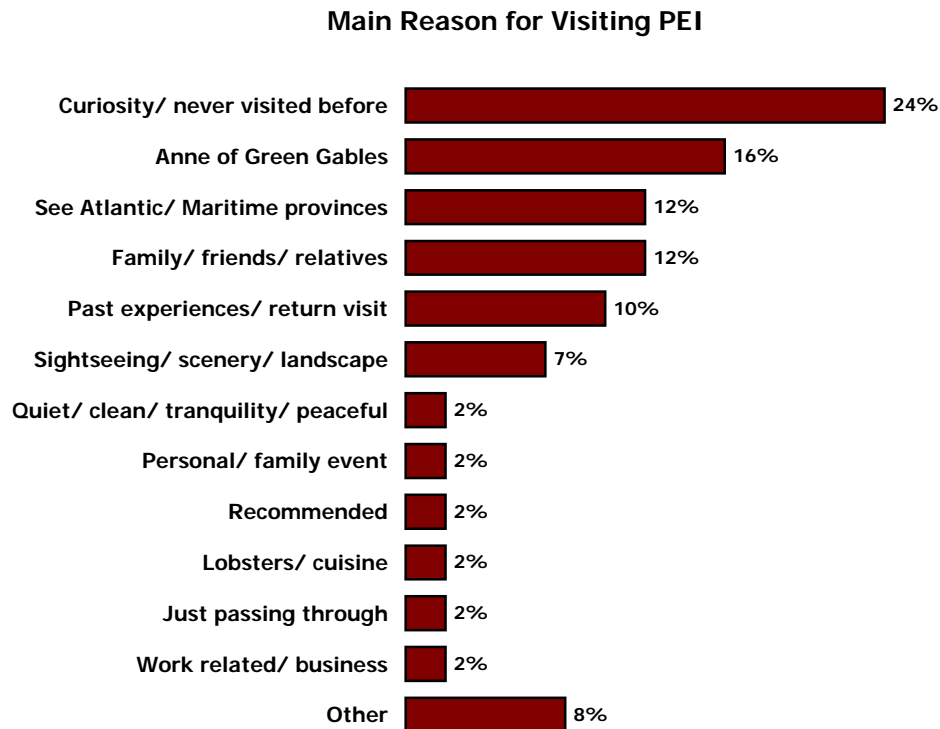


Exhibit 1

Past Visitation to Prince Edward Island

Just over three quarters of other US pleasure visitors were first-time visitors to Prince Edward Island (78%), while 22% have visited the province in the past.

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 2, 63% of other US pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks in advance of their trip. A significantly smaller proportion of visitors planned their trip 4 or less weeks in advance (12%).

Timing of Decision to Visit PEI	
More than 12 weeks prior	63%
11-12 weeks prior	8%
5-6 weeks prior	7%
3-4 weeks prior	6%
9-10 weeks prior	5%
7-8 weeks prior	4%
Less than 2 weeks prior	4%
Last minute decision	2%

Exhibit 2

Party Composition

Just over half (52%) of pleasure parties from other US were adults (one couple only). Families with children under 18 years of age accounted for 16% of pleasure parties, followed by adults (two or more couples) (14%), groups of friends/ adults travelling together (12%), and single travellers (5%) (Exhibit 3).

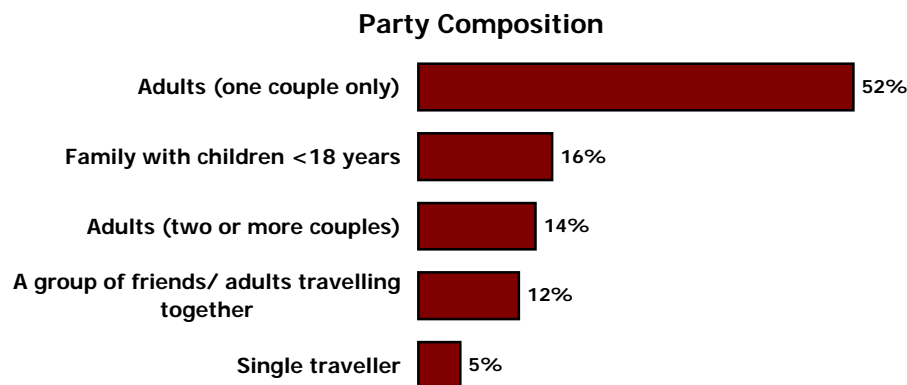


Exhibit 3

Demographics

A profile of other US visitors is presented in Exhibit 4. The majority of pleasure visitors from other US states were between the ages of 50-69 (62%). Close to half (48%) were retired, and 38% were employed full-time. For the most part, annual incomes for this group of visitors ranged from \$35,000 to more than \$100,000 (69%). The average length of stay in Prince Edward Island was 3.4 nights.

Other US Visitor Profile	
Age	
20-29 years	4%
30-39 years	7%
40-49 years	15%
50-59 years	26%
60-69 years	36%
70 years and older	13%
Employment Status	
Retired	48%
Employed full-time	38%
Employed part-time	6%
Homemaker	5%
Other	3%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	3%
\$35,000-\$50,000	16%
\$50,000-75,000	19%
\$75,000-\$100,000	16%
More than \$100,000	18%
Refused	26%
Average Number of Nights in PEI	3.4

Exhibit 4

Main Overnight Destination

As shown in Exhibit 5, the most popular overnight destinations for pleasure visitors from other US states included Charlottetown (37%) and Cavendish, Beaches, and the Dune Shore (24%).

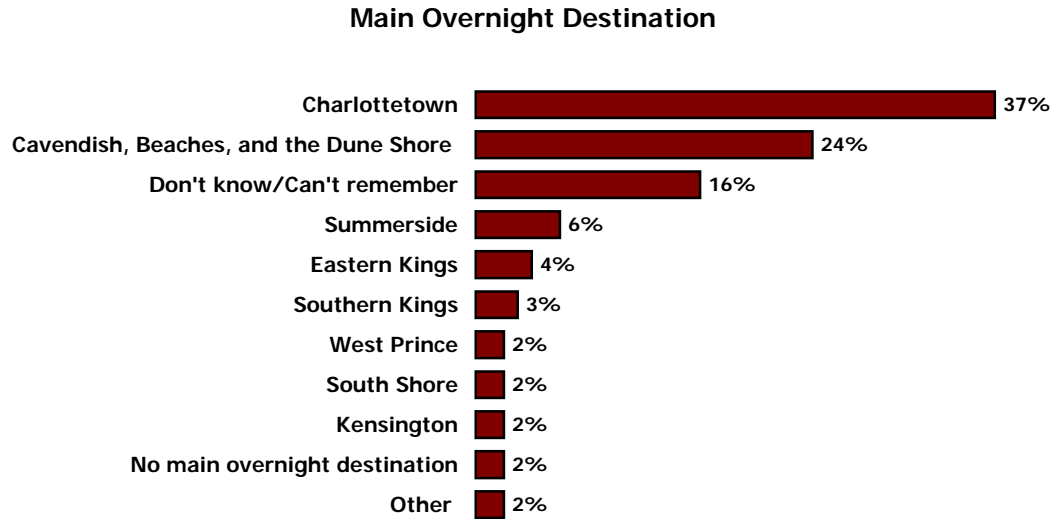


Exhibit 5

Main Overnight Accommodations

Almost all pleasure visitors from other US states stayed in paid accommodations during their 2004 pleasure trip to Prince Edward Island (96%). Hotels/ motels/ resorts represented the most common paid accommodation type (41%), followed by B & B's/ Country Inn's (23%), cabins/ cottages (13%), and private campgrounds/ trailer parks (10%) (Exhibit 6).

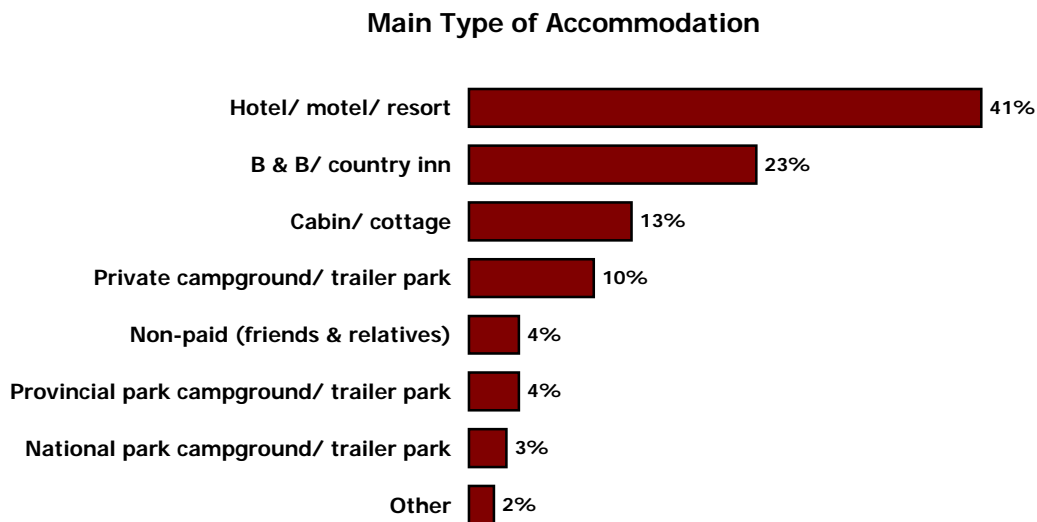


Exhibit 6

Visitor Activities

The most common activities for other US pleasure visitors (Exhibit 7) included sightseeing (85%), craft/ souvenir shopping (69%), beach visits (66%), visiting Anne of Green Gables attractions (63%), and visiting historical/ cultural attractions (60%).

Other US Visitor Activities*	
Sightseeing	85%
Craft/ souvenir shopping	69%
Beach visits	66%
Visiting Anne of Green Gables attractions	63%
Visiting historical/ cultural attractions	60%
Driving tour	59%
Visiting national park	55%
Lobster suppers	51%
Experiencing Acadian culture	42%
Shopping	33%
Canada's birthplace attractions	31%
Confederation trail	28%
Founder's Hall	25%
Live theatre	23%
Hiking	20%
Festivals/ events	17%
Camping	17%
Harbour/city/ land tours	16%
Bird watching	15%
Visiting friends & relatives	11%
Boating/ canoeing/ kayaking/ sailing	7%
Cycling	6%
Nightlife	5%
Sports (participant)	5%
Golf	5%
Fun/ theme parks	5%
Deep sea/ salt water fishing	3%
Other	2%

* Multiple Responses Allowed

Exhibit 7

5.10 International

Market Overview

The number of pleasure parties visiting Prince Edward Island from International locations in 2004 equaled 8,014 and the number of pleasure visitors equaled 20,195. Total expenditures by pleasure visitors from International locations amounted to \$8.5 million in 2004.

Main Reason for Visiting Prince Edward Island

As shown in Exhibit 1, the primary reasons for visiting Prince Edward Island expressed by pleasure visitors from International locations in 2004 included visiting family/ friends/ relatives (24%), to see the Atlantic Provinces/ Maritimes (18%), curiosity/ never visited before (13%), and past experiences/ return visit (10%).

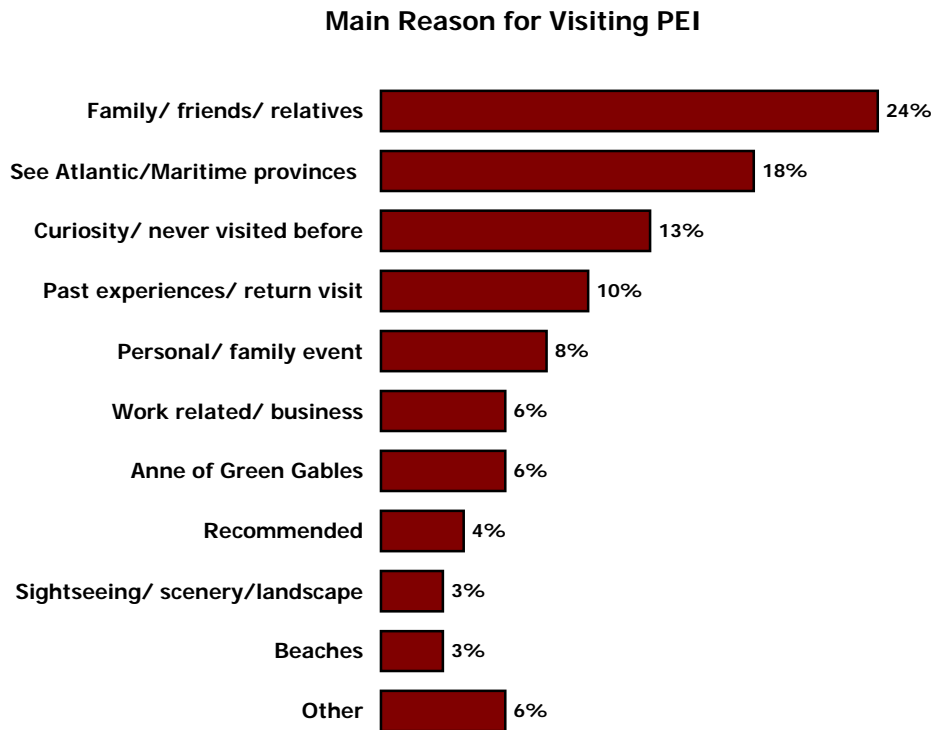


Exhibit 1

Past Visitation to Prince Edward Island

The strong majority of pleasure visitors to Prince Edward Island from International locations were first-time visitors (87%), while 13% reported that they were first-time visitors to PEI.

Timing of Decision to Visit Prince Edward Island

The strong majority of International pleasure visitors made their decision to visit Prince Edward Island more than 12 weeks in advance of their trip (84%) (Exhibit 2).

Timing of Decision to Visit PEI	
More than 12 weeks prior	84%
3-4 weeks prior	5%
Last minute decision	3%
9-10 weeks prior	2%
7-8 weeks prior	2%
5-6 weeks prior	2%
Less than 2 weeks prior	2%
11-12 weeks prior	1%

Exhibit 2

Party Composition

In terms of party composition (Exhibit 3), 59% of travel parties from International locations were adults (one couple only), followed by families with children under 18 years of age (22%), groups of friends/ adults traveling together (9%), single travellers (7%) and adults (two or more couples) (4%).

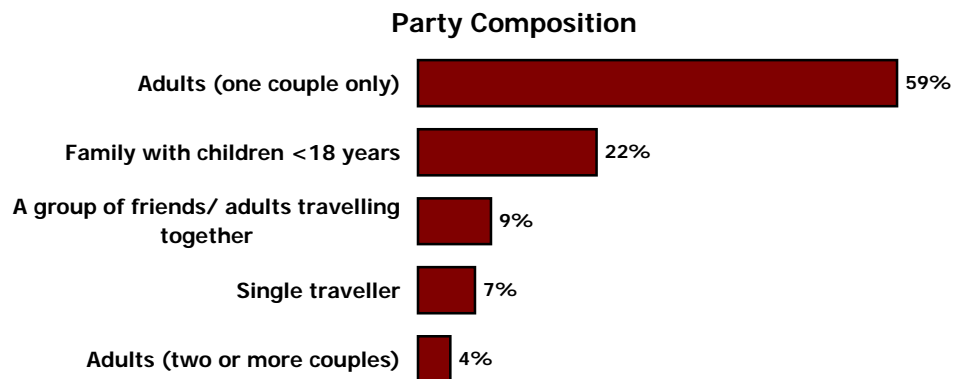


Exhibit 3

Demographics

Overall, 51% of pleasure visitors from International locations were between the ages of 50-69. Approximately 52% were employed on a full-time basis and 58% of pleasure visitors had an annual household income of \$50,000 or greater. The average length of stay in Prince Edward Island for this group of travelers was 4.3 nights (Exhibit 4).

International Visitor Profile	
Age	
20-29 years	6%
30-39 years	16%
40-49 years	18%
50-59 years	20%
60-69 years	31%
70 years and older	9%
Employment Status	
Employed full-time	52%
Retired	25%
Employed part-time	21%
Other	2%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	2%
\$35,000-\$50,000	15%
\$50,000-75,000	24%
\$75,000-\$100,000	10%
More than \$100,000	24%
Refused	25%
Average Number of Nights in PEI	4.3

Exhibit 4

Main Overnight Destination

As Exhibit 5 shows, for the majority of International visitors, the main overnight destination was Charlottetown (64%) followed by Cavendish, Beaches, and the Dune Shore (18%).

Main Overnight Destination

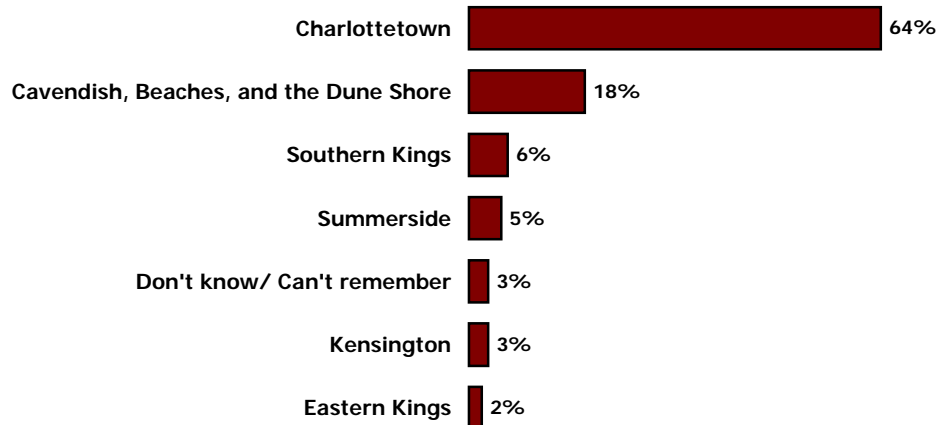


Exhibit 5

Main Overnight Accommodations

Seven percent of pleasure visitors from international markets stayed with friends and relatives during their 2004 pleasure trip to Prince Edward Island. Of those who stayed in paid accommodation, the largest proportion (46%) stayed in hotels/ motels/ resorts, followed by B & B's/ Country Inn's (27%), and cabins/ cottages (18%) (Exhibit 6).

Main Type of Accommodation

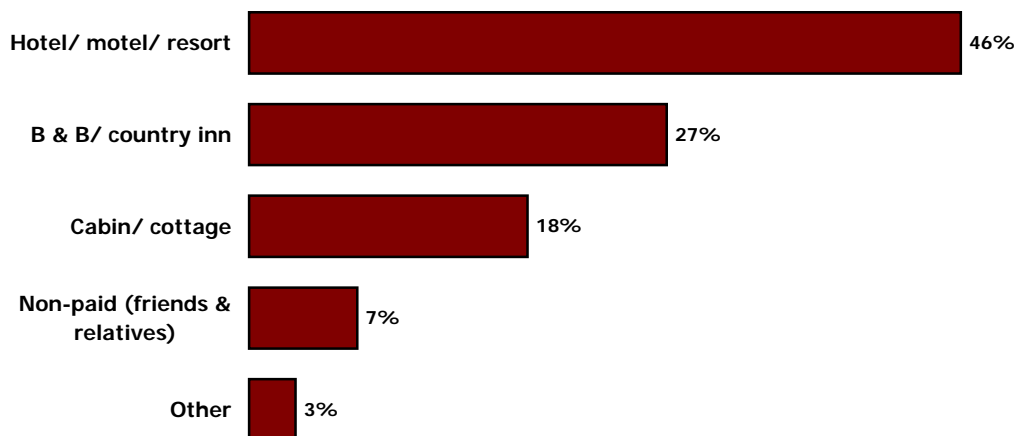


Exhibit 6

Visitor Activities

As shown in Exhibit 7, the most popular activities for pleasure visitors from International locations were sightseeing (90%), craft/ souvenir shopping (77%), beach visits (76%), visiting a national park (71%), and visiting Anne of Green Gables attractions (66%).

International Visitor Activities*	
Sightseeing	90%
Craft/ souvenir shopping	77%
Beach visits	76%
Visiting national park	71%
Visiting Anne of Green Gables attractions	66%
Visiting historical/ cultural attractions	62%
Driving tour	62%
Founder's Hall	49%
Confederation trail	45%
Experiencing Acadian culture	41%
Shopping	40%
Canada's birthplace attractions	39%
Lobster suppers	32%
Festivals/ events	25%
Harbour/ city/ land tours	25%
Nightlife	24%
Visiting friends & relatives	24%
Bird watching	23%
Hiking	20%
Live theatre	15%
Boating/ canoeing/ kayaking/ sailing	15%
Fun/ theme parks	8%
Golf	7%
Sports (participant)	6%
Cycling	5%
Deep sea/ salt water fishing	2%
Sports (spectator)	2%
Camping	2%
Other	1%

* Multiple Responses Allowed

Exhibit 7

6 PRINCE EDWARD ISLAND'S TOURISM REGIONS

6.1 Cavendish, Beaches, and the Dune Shore Tourism Region

Visitor and economic impact information for the Cavendish, Beaches, and the Dune Shore tourism region is based on 940 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 3.81\%$.

Overview

Based on the 2004 survey, it is estimated that 33% of all pleasure visitors to Prince Edward Island (approximately 95,377 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Cavendish, Beaches, and the Dune Shore tourism region as their main overnight destination. Expenditures in this region totaled \$96.7 million.

Origin by Market

In 2004, the majority of pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region of Prince Edward Island were from Ontario (26%), Nova Scotia (22%), or New Brunswick (19%) (Exhibit 1).

Visitor Origins

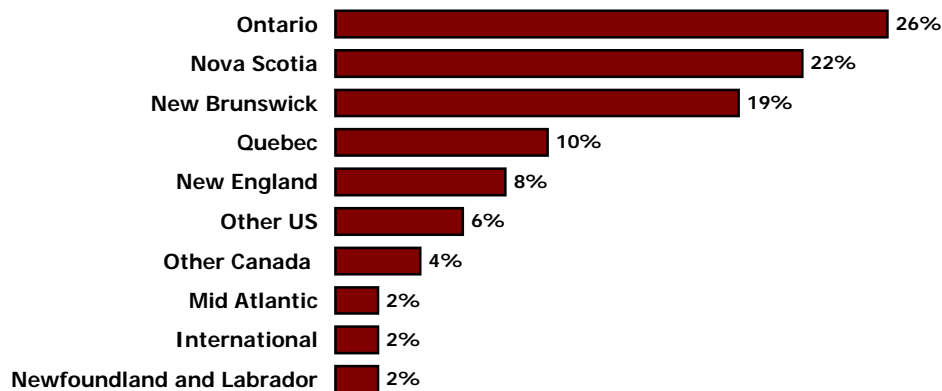


Exhibit 1

Main Reason for Visiting Prince Edward Island

As shown in Exhibit 2, the main reasons for visiting Prince Edward Island expressed by overnight visitors pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region included past experiences/ return visits (18%), curiosity/ never been there before (15%), to visit friends and relatives, and beaches (10% each).

Main Reason for Visiting PEI

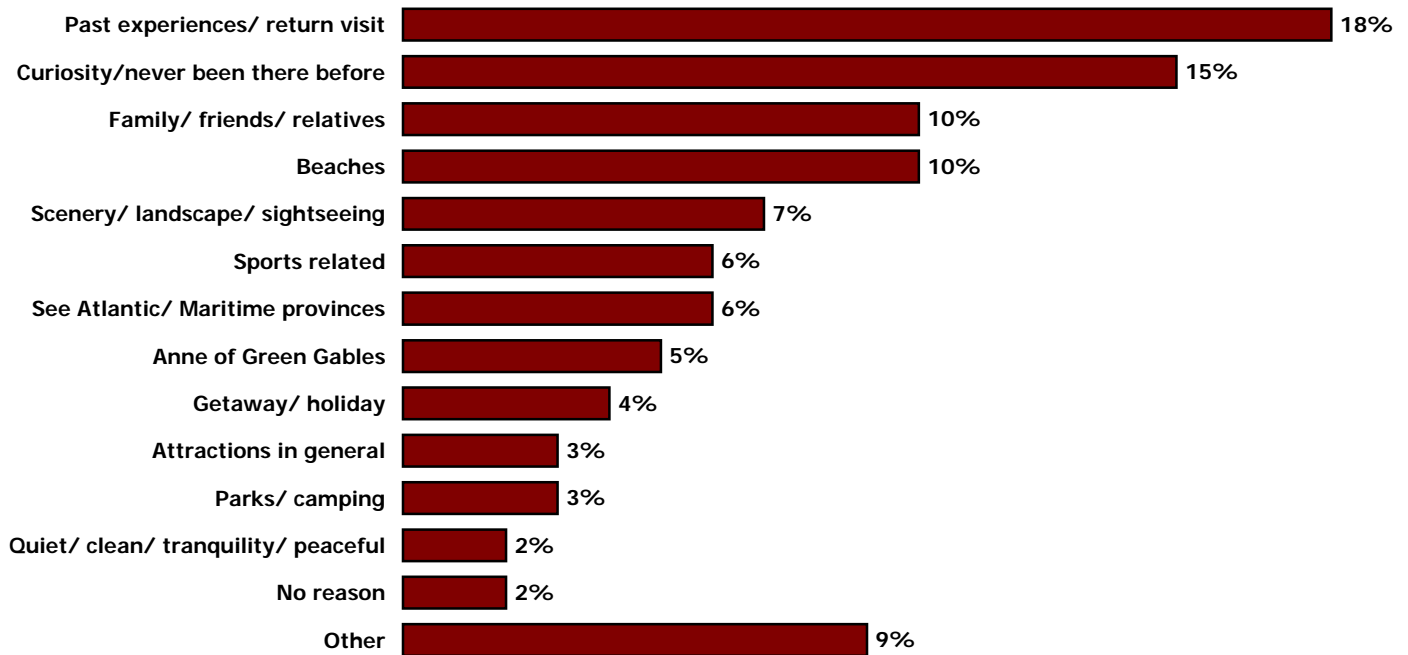


Exhibit 2

Past Visitation to Prince Edward Island

Sixty-six percent of overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region were repeat visitors to Prince Edward Island while the remaining 34% were first-time visitors.

Main Overnight Accommodations

The strong majority (96%) of overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region stayed in paid accommodations. The most common accommodation types were cabins/ cottages (37%), hotels/ motels/ resorts (21%), and private campgrounds/ trailer parks (15%) (Exhibit 3).

Main Type of Accomodation

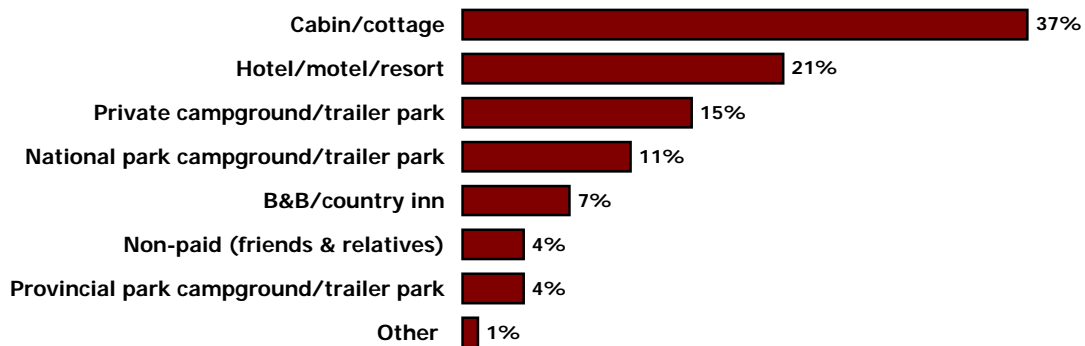


Exhibit 3

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 4, approximately half (49%) of overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region made their decision to visit Prince Edward Island more than 12 weeks before visiting the province.

Timing of Decision to Visit PEI	
More than 12 weeks prior	49%
3-4 weeks prior	14%
Less than 2 weeks prior	9%
7-8 weeks prior	9%
5-6 weeks prior	7%
11-12 weeks prior	5%
9-10 weeks prior	4%
Last minute decision	4%

Exhibit 4

Party Composition

Party composition is presented in Exhibit 5. Families with children under the age of 18 accounted for 43% of overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region, followed by adults (one couple only) (34%), groups of friends/ adults traveling together (12%), adults (two or more couples) (9%), and single travellers (2%).

Party Composition

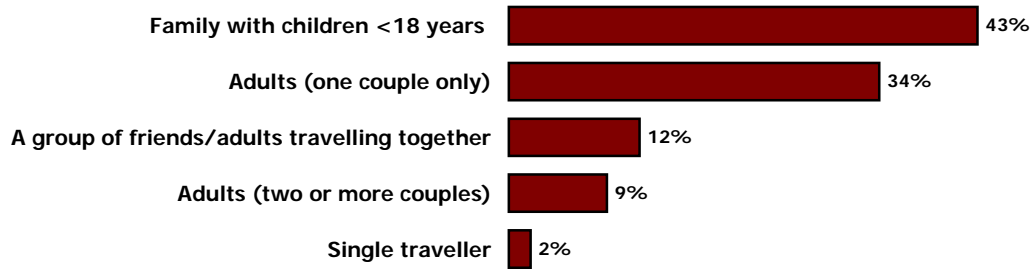


Exhibit 5

Expenditures

Expenditures in the Cavendish, Beaches, and the Dune Shore tourism region of Prince Edward Island are presented in Exhibit 6. In 2004, overnight pleasure parties spent a total of \$97.2 million with an average of \$944.23 per party. Accommodations accounted for most of the total expenditures (35%), followed by meals (19%) and groceries (11%).

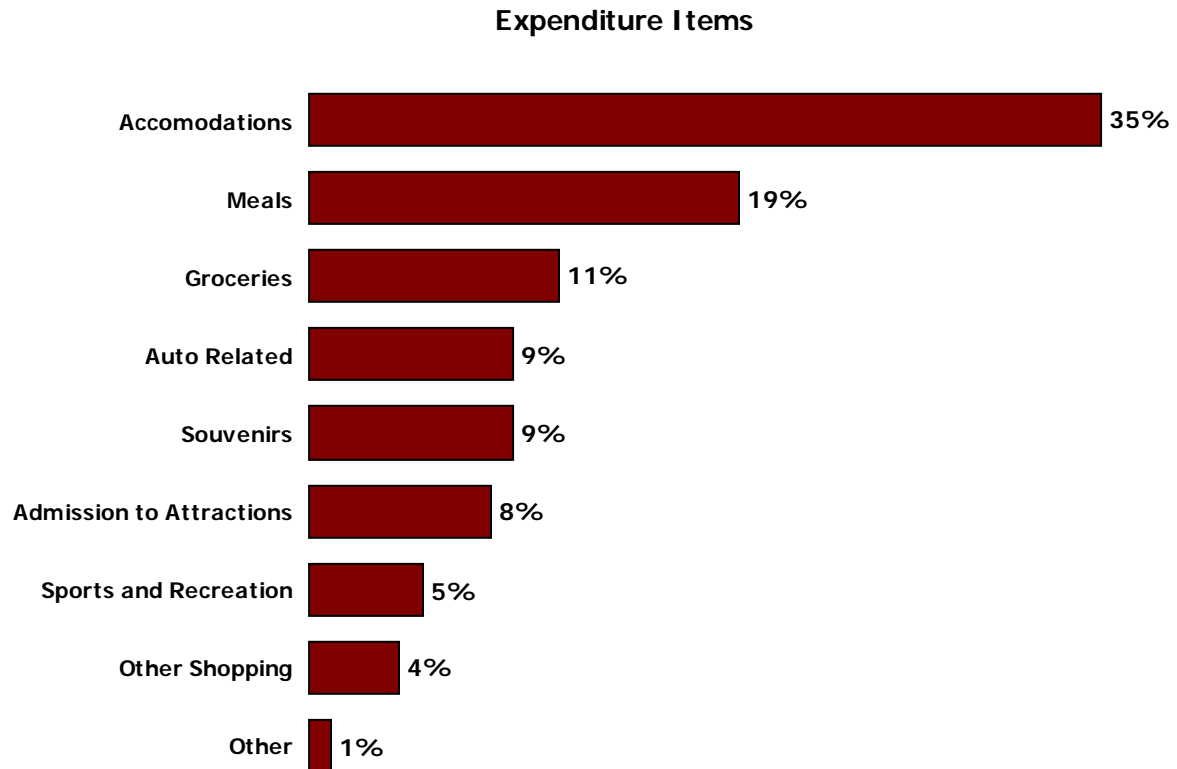


Exhibit 6

Demographics

The majority of overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region were between the ages of 40 and 69 (73%), had an annual salary of \$50,000 or over (54%), and were working full-time (64%). Overnight pleasure visitors to this region spent an average of 4.1 nights in Prince Edward Island (Exhibit 7).

Cavendish, Beaches, and the Dune Shore Visitor Profile	
Age	
20-29 years	7%
30-39 years	20%
40-49 years	28%
50-59 years	25%
60-69 years	15%
70 years and older	6%
Household Income	
Less than \$20,000	2%
\$20,000-\$35,000	7%
\$35,000-\$50,000	17%
\$50,000-\$75,000	20%
\$75,000-\$100,000	16%
More than \$100,000	18%
Refused	21%
Employment Status	
Employed full-time	64%
Retired	22%
Employed part-time	7%
Homemaker	4%
Other	3%
Average Number of Nights in PEI	4.1

Exhibit 7

Visitor Activities

Overnight pleasure visitors to the Cavendish, Beaches, and the Dune Shore tourism region of Prince Edward Island participated in a variety of activities (Exhibit 8). The top five activities included beach visits (74%), sightseeing (71%), craft/ souvenir shopping (66%), visiting a national park (57%), and driving tours (44%).

Cavendish, Beaches, and the Dune Shore Visitor Activities*	
Beach visits	74%
Sightseeing	71%
Craft/ souvenir shopping	66%
Visiting national park	57%
Driving tour	44%
Shopping (general merchandise)	42%
Lobster suppers	41%
Visiting Anne of Green Gables attractions	41%
Visiting historical/ cultural attractions	37%
Camping	31%
Fun/ theme parks	30%
Experiencing Acadian culture	24%
Golf	20%
Canada's birthplace attractions	19%
Confederation trail	19%
Visiting friends & relatives	19%
Hiking	17%
Bird watching	16%
Live theatre	14%
Festivals/ events	14%
Harbour/ city/ land tours	13%
Nightlife	10%
Founder's Hall	10%
Cycling	9%
Sports (participant)	9%
Boating/ canoeing/ kayaking/ sailing	7%
Deep sea/ salt water fishing	7%
Sports (spectator)	2%
Other	3%

*Multiple Responses Allowed

Exhibit 8

6.2 Charlottetown Tourism Region

Visitor and economic impact information for the Charlottetown tourism region is based on 1,045 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 3.01\%$.

Overview

Based on the 2004 survey, it is estimated that 28% of all pleasure visitors to Prince Edward Island (approximately 81,374 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Charlottetown tourism region as their main overnight destination. Total expenditures in this region amounted to \$73.5 million.

Origin by Market

The primary origins of overnight visitors to the Charlottetown tourism region included Ontario (20%), followed by Nova Scotia (15%), New Brunswick (13%), other Canada and other US states (11% each) (Exhibit 1).

Visitor Origins

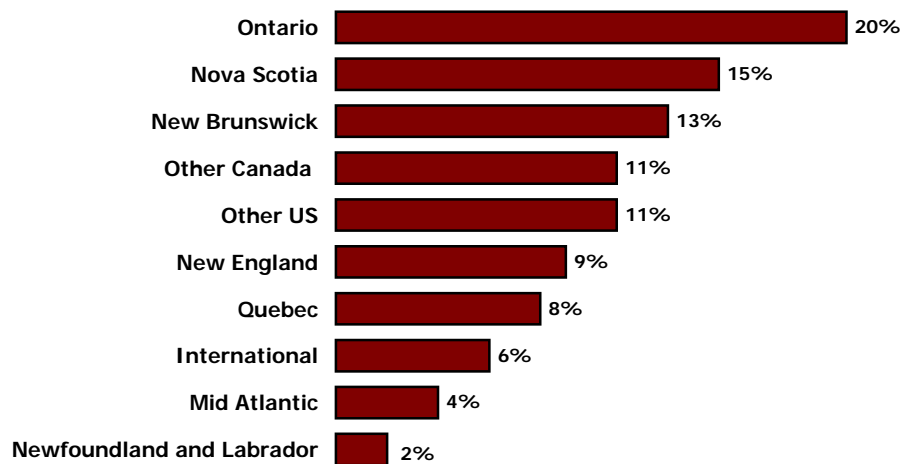


Exhibit 1

Past Visitation to Prince Edward Island

The slight majority of pleasure visitors to the Charlottetown tourism region were repeat visitors to the Island (54%). The remaining 46% reported that they were first-time visitors to PEI.

Main Reason for Visiting Prince Edward Island

In 2004, the main travel motives expressed by overnight pleasure visitors to the Charlottetown tourism region of Prince Edward Island were family/ friends/ relatives (20%), curiosity/ never been there before (15%), and scenery/ landscape/ sightseeing (10%) (Exhibit 2).

Main Reason for Visiting PEI

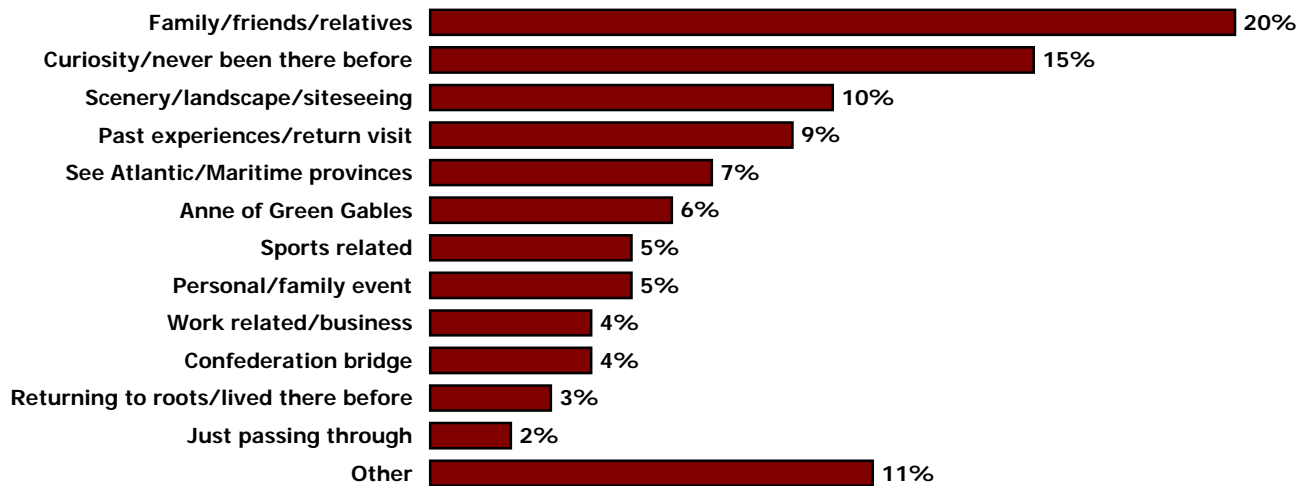


Exhibit 2

Main Overnight Accommodations

As shown in Exhibit 3, the majority (84%) of overnight pleasure visitors to the Charlottetown tourism region stayed in paid accommodations, while 16% stayed in non-paid accommodations with friends and relatives. Of those who chose paid accommodations, more than half (55%) stayed in a hotel/ motel/ resort, followed distantly by B & B/ Country Inn (11%), and cabin/ cottage (8%).

Main Type of Accommodation

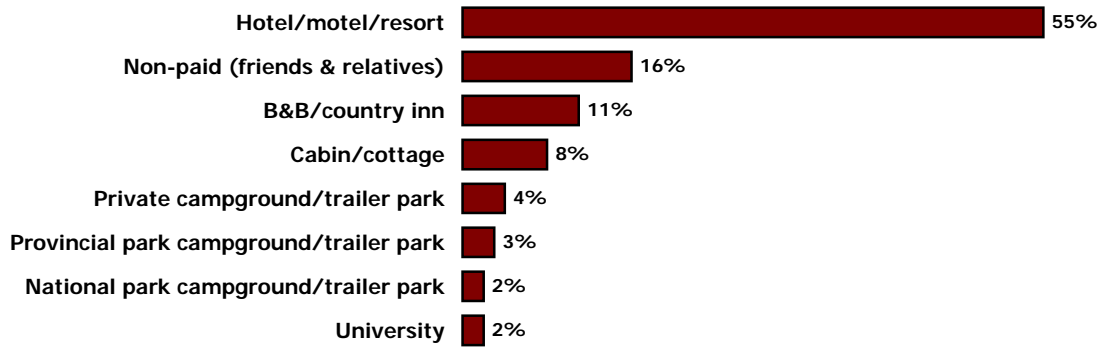


Exhibit 3

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 4, 43% of overnight pleasure visitors to the Charlottetown tourism region made their decision to visit Prince Edward Island more than 12 weeks prior to visiting the province. A further 24% made the decision less than two weeks prior to visiting or three to four weeks prior to visiting (12% each).

Timing of Decision to Visit PEI	
More than 12 weeks prior	43%
Less than 2 weeks prior	12%
3-4 weeks prior	12%
7-8 weeks prior	9%
11-12 weeks prior	8%
5-6 weeks prior	7%
9-10 weeks prior	5%
Last minute decision	3%
Don't know/ Can't remember	1%

Exhibit 4

Party Composition

Approximately half (49%) of the overnight pleasure visitors to the Charlottetown tourism region of Prince Edward Island consisted of adults (one couple only), followed by families with children under the age of 18 (22%), groups of friends/ adults traveling together (12%), adults consisting of two or more couples (9%), and single travellers (8%) (Exhibit 5).

Party Composition

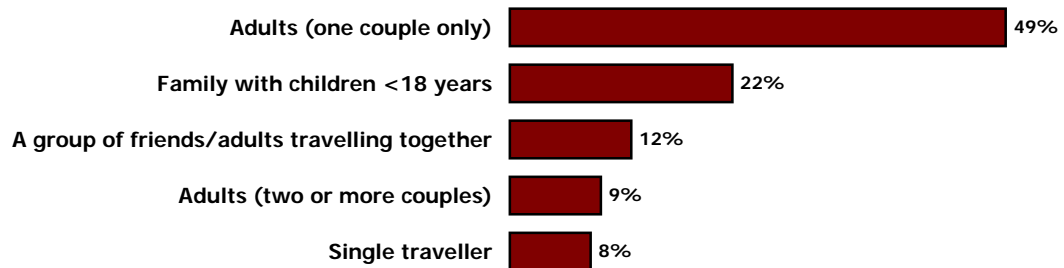


Exhibit 5

Expenditures

Pleasure parties whose primary overnight destination was the Charlottetown tourism region spent a total of \$73.5 million with an average of \$826.48 per party. Accommodations accounted for 34% of total expenditures, followed by meals (23%) and auto related (12%) (Exhibit 6).

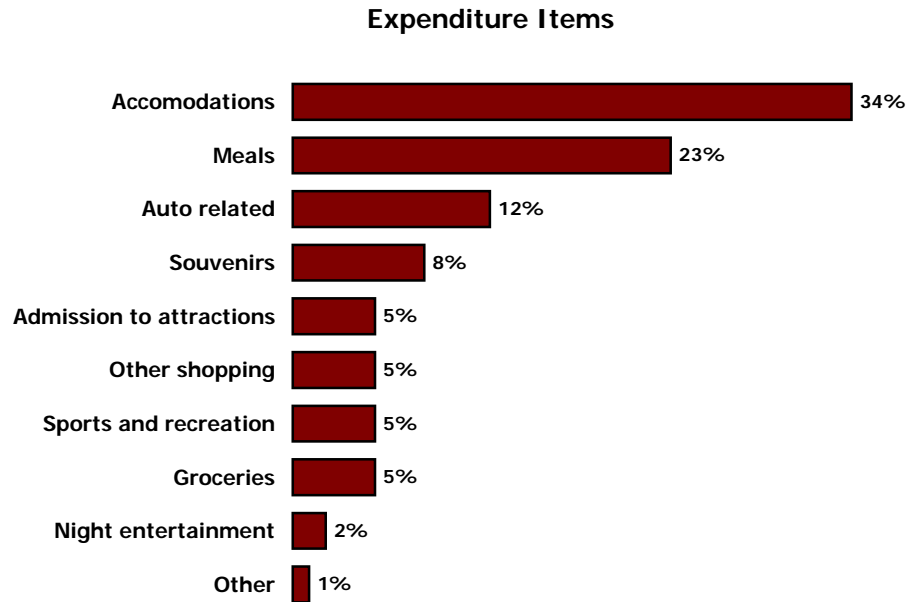


Exhibit 6

Demographics

Pleasure visitors who stayed overnight in the Charlottetown tourism region are profiled in Exhibit 7. As shown, visitors were primarily between the ages of 40 and 69 (71%), had an annual salary of over \$35,000 (74%), and were working full-time (60%). Overnight pleasure visitors to this region spent an average of 3.4 nights in Prince Edward Island.

Charlottetown Visitor Profile	
Age	
20-29 years	5%
30-39 years	13%
40-49 years	19%
50-59 years	30%
60-69 years	22%
70 years and older	11%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	5%
\$35,000-\$50,000	17%
\$50,000-\$75,000	19%
\$75,000-\$100,000	15%
More than \$100,000	23%
Refused	20%
Employment Status	
Employed full-time	60%
Retired	30%
Working part-time	6%
Homemaker	2%
Other	2%
Average Number of Nights in PEI	3.4

Exhibit 7

Visitor Activities

As shown in Exhibit 8, the top five activities of overnight pleasure visitors to the Charlottetown tourism region included sightseeing (68%), craft/ souvenir shopping (65%), beach visits (54%), and driving tours and visiting Anne of Green Gables attractions (44% each).

Charlottetown Visitor Activities*	
Sightseeing	68%
Craft/ souvenir shopping	65%
Beach visits	54%
Driving tour	44%
Visiting Anne of Green Gables attractions	44%
Visiting national park	43%
Visiting historical/ cultural attractions	42%
Shopping (general merchandise)	36%
Lobster suppers	35%
Canada's birthplace attractions	32%
Visiting friends & relatives	28%
Experiencing Acadian culture	27%
Founder's Hall	24%
Confederation trail	22%
Festivals/ events	18%
Live theatre	17%
Harbour/ city/ land tours	16%
Nightlife	16%
Bird watching	11%
Fun/ theme parks	11%
Hiking	11%
Camping	10%
Golf	9%
Boating/ canoeing/ kayaking/ sailing	7%
Deep sea/ salt water fishing	5%
Sports (participant)	5%
Cycling	4%
Sports (spectator)	3%
Other	1%

*Multiple Responses Allowed

Exhibit 8

6.3 Eastern Kings Tourism Region

Visitor and economic impact information for the Eastern Kings tourism region is based on 146 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 8.07\%$.

Overview

Based on the 2004 survey, it is estimated that 5% of all pleasure visitors to Prince Edward Island (approximately 13,901 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Eastern Kings tourism region as their main overnight destination. Total expenditures in this region equaled \$16.3 million.

Origin by Market

As shown in Exhibit 1, Ontario represented the main origin of overnight pleasure visitors to the Eastern Kings region at 27%, followed by Nova Scotia (22%), Quebec (17%), New England (12%), Other US (7%), Mid Atlantic (6%), and New Brunswick and Other Canada (4% each).

Visitor Origins

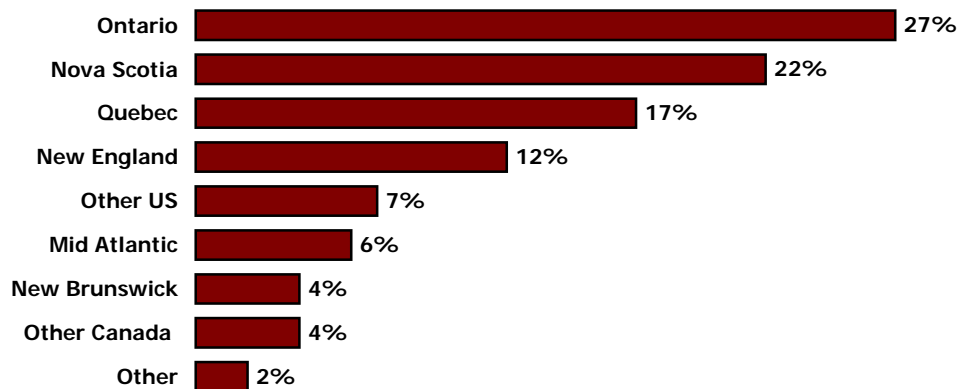


Exhibit 1

Past Visitation to Prince Edward Island

The majority of overnight pleasure visitors to the Eastern Kings tourism region of Prince Edward Island were repeat visitors (79%). Twenty-one percent reported that this was their first trip to the Island.

Main Reason for Visiting Prince Edward Island

Visiting family, friends and relatives was the main travel motive cited by 38% of overnight pleasure visitors to the Eastern Kings region. A further 15% reported past experiences/return visit as the primary reason for visiting Prince Edward Island (Exhibit 2).

Main Reason for Visiting PEI

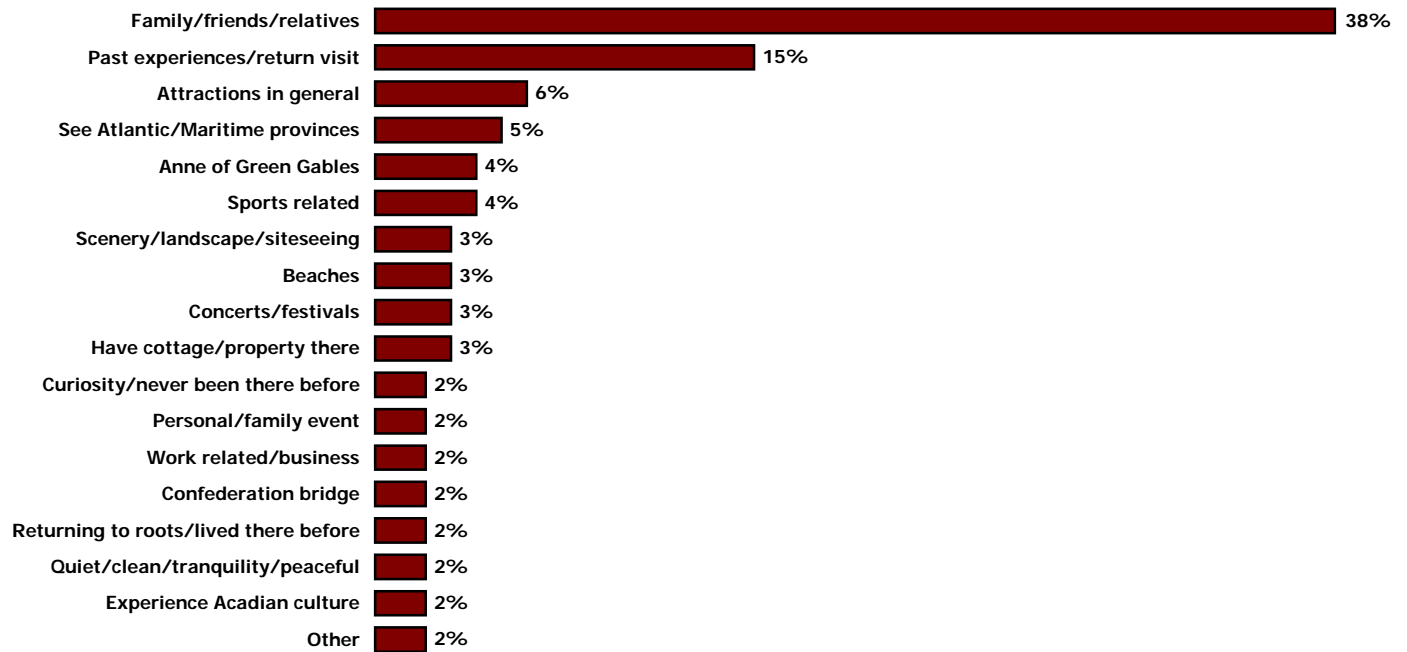


Exhibit 2

Main Overnight Accommodations

As shown in Exhibit 3, approximately eight in ten (81%) overnight pleasure visitors to the Eastern Kings tourism region stayed in paid accommodations, while 19% chose to stay in non-paid accommodations with friends and relatives. The main paid accommodation types included cabin/cottage (26%), and hotel/ motel/ resort (22%).

Main Type of Accommodation

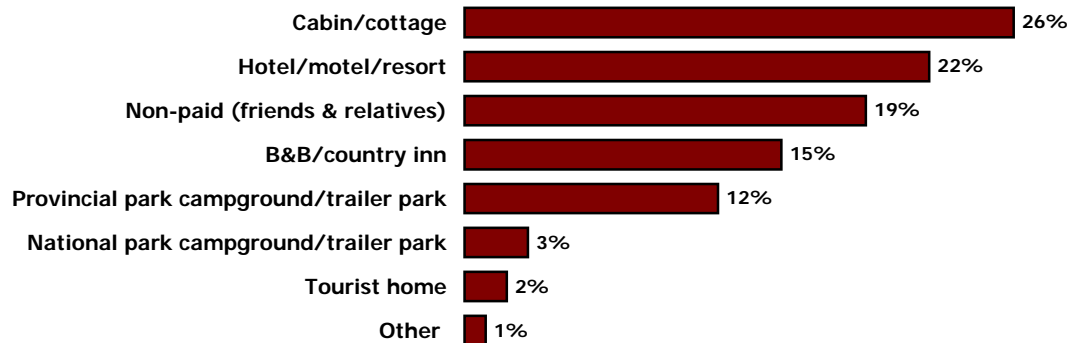


Exhibit 3

Timing of Decision to Visit Prince Edward Island

As Exhibit 4 shows, more than half (55%) of overnight pleasure visitors to the Eastern Kings tourism region made their decision to visit Prince Edward Island at least 11 weeks in advance of their trip with 45% making this decision more than 12 weeks prior to visiting the province.

Timing of Decision to Visit PEI	
More than 12 weeks prior	45%
3-4 weeks prior	17%
11-12 weeks prior	10%
5-6 weeks prior	8%
7-8 weeks prior	6%
Less than 2 weeks prior	5%
9-10 weeks prior	5%
Last minute decision	4%

Exhibit 4

Party Composition

Adults (one couple only) accounted for 48% of the overnight pleasure visitors to the Eastern Kings tourism region of Prince Edward Island. This was followed by families with children under the age of 18 (26%), adults consisting of two couples or more (11%), groups of friends/ adults traveling together (9%), and single travellers (6%) (Exhibit 5).

Party Composition

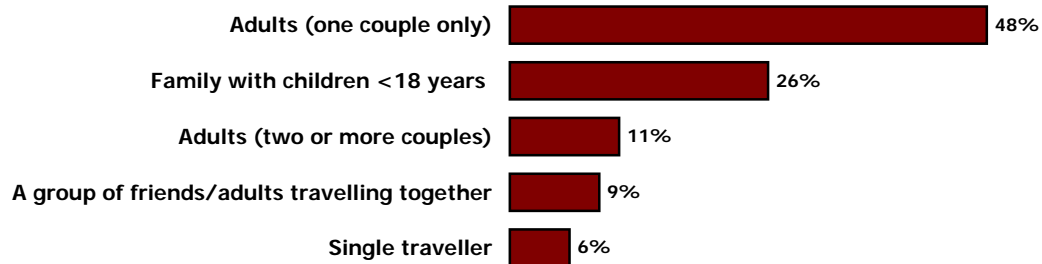


Exhibit 5

Expenditures

In 2004, overnight pleasure parties to the Eastern Kings tourism region spent a total of \$16.3 million with an average of \$1,142.77 per party. The top three expenditure items consisted of accommodations (41%), meals (18%) and groceries (11%) (Exhibit 6).

Expenditure Items

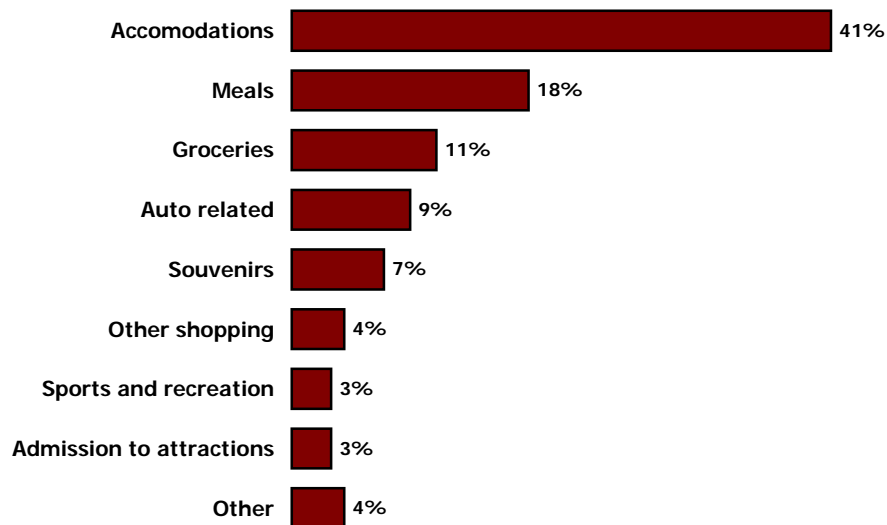


Exhibit 6

Demographics

Pleasure visitors who stayed overnight in the Eastern Kings tourism region are profiled in Exhibit 7. As shown, visitors were primarily between the ages of 40 and 69 (70%), had an annual salary of over \$50,000 (75%), and were working full-time (52%). Overnight pleasure visitors to this region spent an average of 4.8 nights in Prince Edward Island.

Eastern Kings Visitor Profile	
Age	
20-29 years	9%
30-39 years	11%
40-49 years	23%
50-59 years	19%
60-69 years	28%
70 years and older	9%
Household Income	
\$20,000-\$35,000	3%
\$35,000-\$50,000	7%
\$50,000-\$75,000	24%
\$75,000-\$100,000	23%
More than \$100,000	28%
Refused	14%
Employment Status	
Employed full-time	52%
Retired	32%
Employed part-time	12%
Homemaker	2%
Other	2%
Average Number of Nights in PEI	4.8

Exhibit 7

Visitor Activities

The top five activities of overnight pleasure visitors to the Eastern Kings tourism region were beach visits (78%), sightseeing (67%), craft/ souvenir shopping (57%), visiting a national park (46%), and participating in driving tours (44%) (Exhibit 8).

Eastern Kings Visitor Activities*	
Beach visits	78%
Sightseeing	67%
Craft/ souvenir shopping	57%
Visiting national park	46%
Driving Tour	44%
Visiting historical/ cultural attractions	41%
Visiting friends & relatives	38%
Shopping (general merchandise)	33%
Lobster suppers	32%
Canada's birthplace attractions	24%
Hiking	22%
Camping	21%
Harbour/ city/ land tours	21%
Bird watching	21%
Golf	19%
Experiencing Acadian culture	16%
Festivals/ events	16%
Visiting Anne of Green Gables attractions	16%
Founder's Hall	15%
Confederation trail	15%
Nightlife	9%
Cycling	9%
Boating/ canoeing/ kayaking/ sailing	8%
Live theatre	6%
Deep sea/ salt water fishing	5%
Fun/ theme parks	4%
Sports (participant)	4%
Other	2%

* Multiple Responses Allowed

Exhibit 8

6.4 Evangeline Tourism Region

Visitor and economic impact information for the Evangeline tourism region is based on 19 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 22.41\%$.

Overview

Based on the 2004 survey, it is estimated that 1% of all pleasure visitors to Prince Edward Island (approximately 2,715 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Evangeline tourism region as their main overnight destination. Expenditures in this region totaled \$2.2 million.

Origin by Market

In 2004, most overnight pleasure visitors to the Evangeline region of Prince Edward Island were from New Brunswick (43%), followed distantly by Nova Scotia (22%), Quebec (13%) and New England (12%) (Exhibit 1).

Visitor Origins

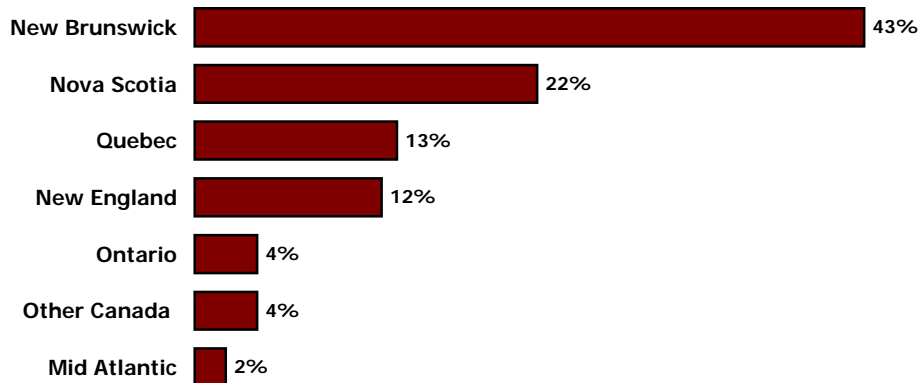


Exhibit 1

Past Visitation to Prince Edward Island

The majority of overnight pleasure visitors to the Evangeline tourism region were repeat visitors to the Island (74%). Just over one-quarter of visitors (26%) were first-time visitors.

Main Reason for Visiting Prince Edward Island

As Exhibit 2 shows, the main reasons for visiting Prince Edward Island as reported by overnight pleasure visitors to the Evangeline tourism region included visiting family/ friends/ relatives (32%), curiosity/ never been there before (14%), concerts/ festivals (12%), and to see the Atlantic/ Maritime provinces (12 %).

Main Reason for Visiting PEI

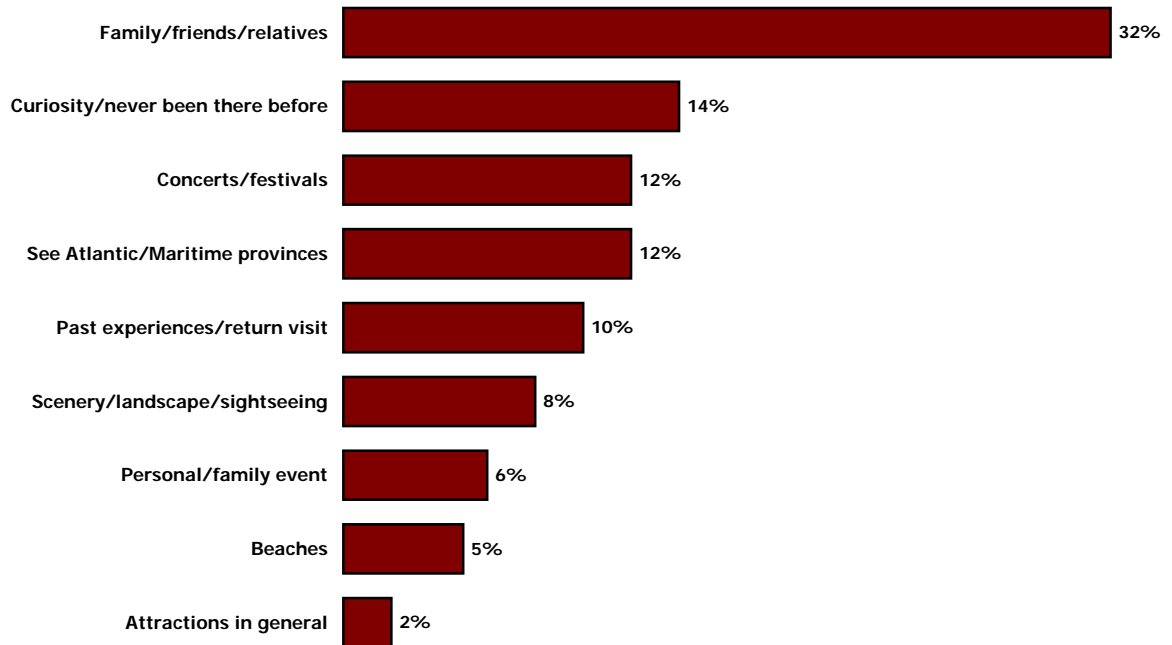


Exhibit 2

Main Overnight Accommodations

As shown in Exhibit 3, approximately two in ten (21%) overnight visitors to the Evangeline tourism region stayed in non-paid accommodations with friends or relatives. For those that used paid accommodations, 39% chose a cabin/ cottage as their main type of accommodation, followed by a hotel/ motel/ resort (27%), and a private campground/ trailer park (12%).

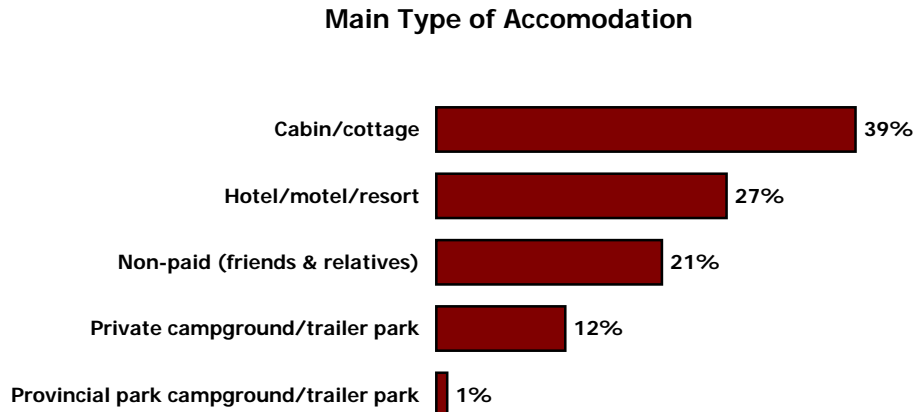


Exhibit 3

Timing of Decision to Visit Prince Edward Island

Approximately 35% of pleasure visitors to the Evangeline tourism region made their decision to visit Prince Edward Island more than 12 weeks before visiting the province. Alternatively, one-quarter (26%) of visitors made their decision to visit the province less than two weeks before visiting (Exhibit 4).

Timing of Decision to Visit PEI	
More than 12 weeks prior	35%
Less than 2 weeks prior	26%
3-4 weeks prior	19%
7-8 weeks prior	11%
11-12 weeks	5%
5-6 weeks prior	4%

Exhibit 4

Party Composition

Party composition of visitors to the Evangeline tourism region of Prince Edward Island is profiled in Exhibit 5. Adult couples (one couple only) accounted for 50% of the overnight pleasure visitors, followed by families with children under the age of 18 (46%). A small percentage of visitors were groups of friends/ adults traveling together (4%).

Party Composition

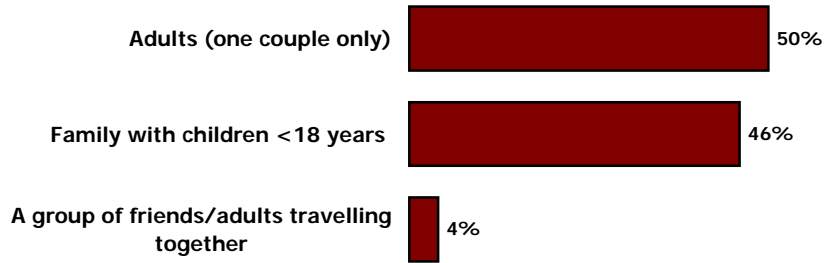


Exhibit 5

Expenditures

In 2004, overnight pleasure parties to the Evangeline tourism region spent a total of \$2.2 million with an average of \$799.55 per party. As shown in Exhibit 6, the top three expenditure items consisted of accommodations (22% of total expenditures), meals (17%) and groceries (15%).

Expenditure Items

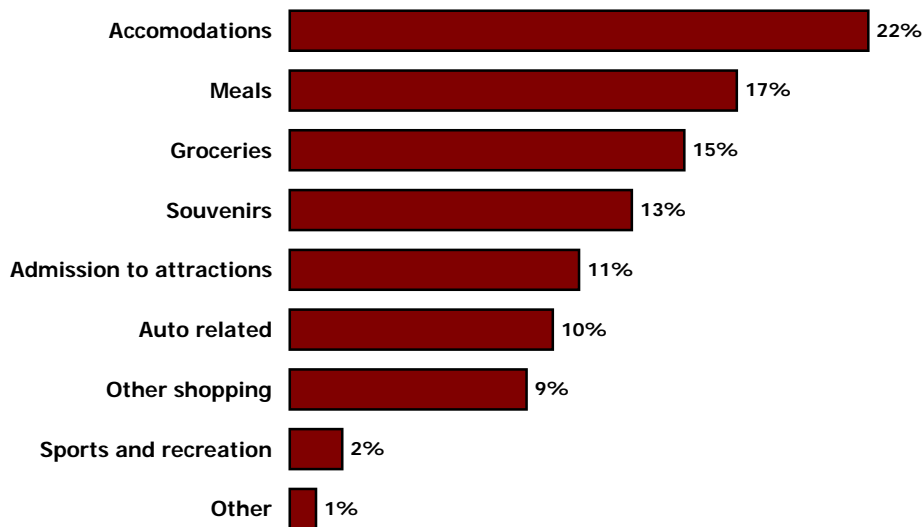


Exhibit 6

Demographics

The majority of overnight pleasure visitors to the Evangeline tourism region were between the ages of 30 and 49 (62%), had an annual salary of \$20,000 to up to \$50,000 (66%), and were working full-time (69%). Overnight pleasure visitors to this region spent an average of 4.6 nights in Prince Edward Island (Exhibit 7).

Evangeline Visitor Profile	
Age	
20-29 years	14%
30-39 years	20%
40-49 years	42%
50-59 years	10%
60-69 years	13%
Refused	1%
Household Income	
Less than \$20,000	6%
\$20,000-\$35,000	25%
\$35,000-\$50,000	41%
\$50,000-\$75,000	8%
\$75,000-\$100,000	2%
More than \$100,000	5%
Refused	13%
Employment Status	
Employed full-time	69%
Employed part-time	14%
Retired	9%
Homemaker	8%
Refused	1%
Average Number of Nights in PEI	4.6

Exhibit 7

Visitor Activities

The top five activities for overnight visitors of the Evangeline tourism region are presented in Exhibit 8. They included craft/ souvenir shopping (58%), festivals/ events (54%), beach visits (50%), shopping (general merchandise) and experiencing Acadian culture (46% each).

Evangeline Visitor Activities*	
Craft/ souvenir shopping	58%
Festivals/ events	54%
Beach visits	50%
Shopping (general merchandise)	46%
Experiencing Acadian culture	46%
Fun/ theme parks	33%
Visiting friends & relatives	33%
Driving tour	30%
Lobster suppers	30%
Canada's birthplace attractions	28%
Sightseeing	27%
Nightlife	24%
Visiting historical/ cultural attractions	23%
Visiting Anne of Green Gables attractions	22%
Bird watching	21%
Confederation trail	19%
Sports (spectator)	18%
Visiting national park	17%
Boating/ canoeing/ kayaking/ sailing	17%
Camping	13%
Harbour/ city/ land tours	13%
Live theatre	11%
Hiking	11%
Sports (participant)	4%
Founder's Hall	4%
Deep sea/ salt water fishing	2%
Golf	2%

*Multiple Responses Allowed

Exhibit 8

6.5 Kensington Tourism Region

Visitor and economic impact information for the Kensington tourism region is based on 81 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 10.85\%$.

Overview

Based on the 2004 survey, it is estimated that 4% of all pleasure visitors to Prince Edward Island (approximately 11,780 visitors) between the period of May 1, 2004 and October 31, 2004 cited the Kensington tourism region as their main overnight destination. Total expenditures in this region equaled \$12.5 million.

Origin by Market

As shown in Exhibit 1, Nova Scotia and New Brunswick represented the two main origins of overnight visitors to the Kensington tourism region (29% and 23% respectively). Further, 17% of visitors were from Ontario, and 16% were from New England.

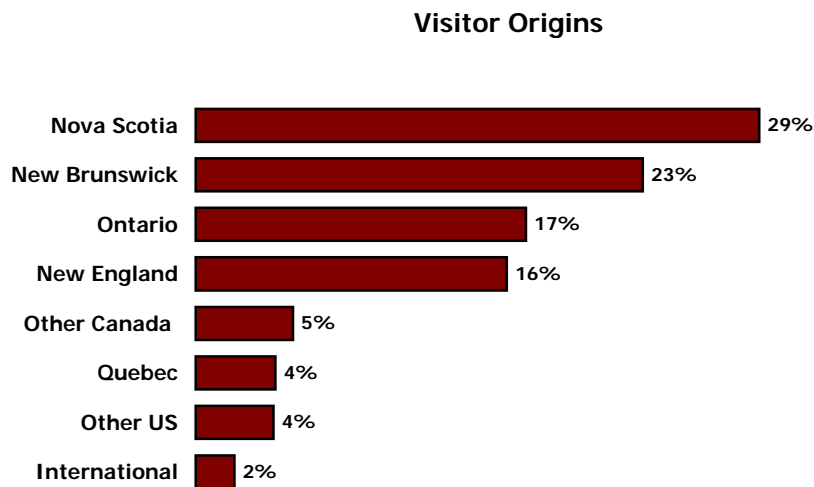


Exhibit 1

Past Visitation to Prince Edward Island

The majority of overnight pleasure visitors to the Kensington tourism region were repeat visitors to Prince Edward Island (85%), with 15% being first-time visitors to the Island.

Main Reason for Visiting Prince Edward Island

In 2004, the most common reason overnight pleasure visitors in the Kensington region vacationed in Prince Edward Island was to visit family/ friends/ relatives (22%), followed by parks/ camping (17%), past experiences/ return visit (16%), and beaches (12%) (Exhibit 2).

Main Reason for Visiting PEI

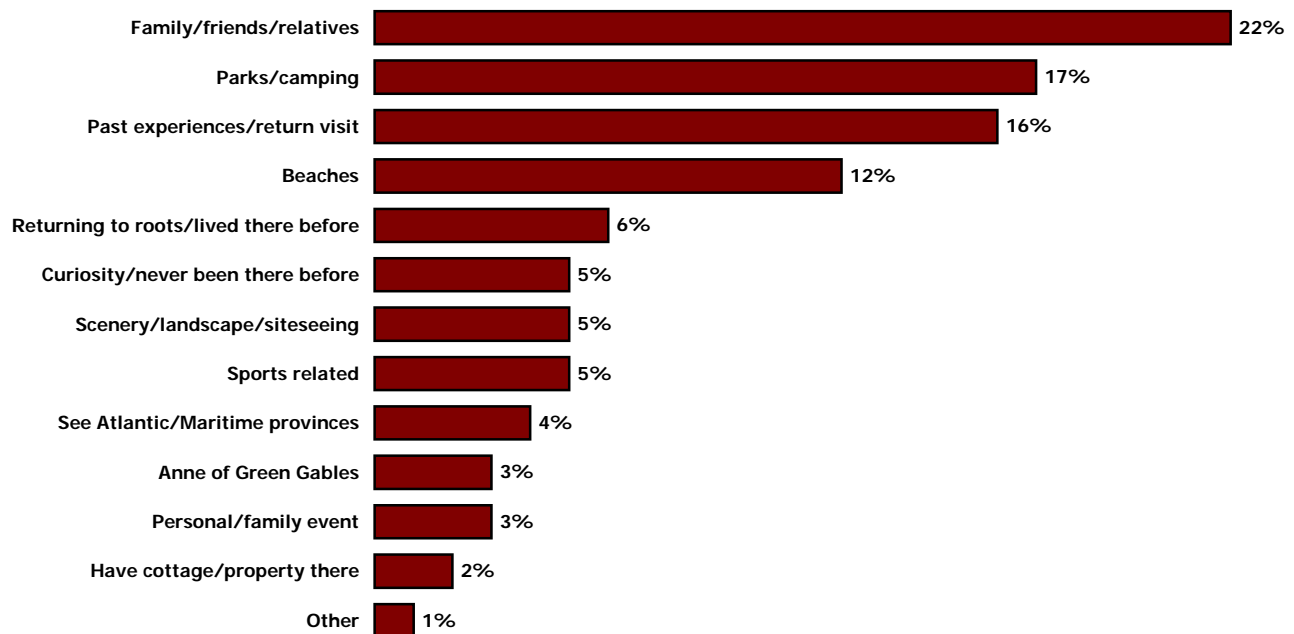


Exhibit 2

Main Overnight Accommodations

The majority (78%) of overnight pleasure visitors to the Kensington tourism region stayed in paid accommodations and 22% stayed in non-paid accommodations with friends and relatives during the trip to the Island. For those who stayed in paid accommodations, the majority either stayed in a cabin/ cottage (29%) or a private campground/ trailer park (26%) (Exhibit 3).

Main Type of Accommodation

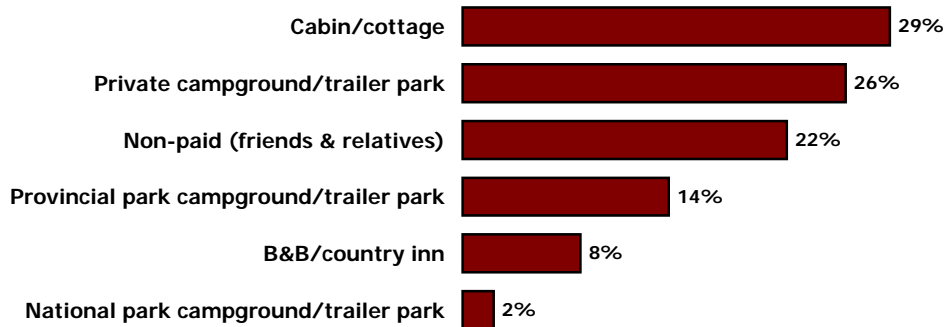


Exhibit 3

Timing of Decision to Visit Prince Edward Island

As shown in Exhibit 4, approximately half (51%) of overnight pleasure visitors to the Kensington tourism region made their decision to vacation in Prince Edward Island more than 12 weeks prior to visiting the province. Approximately two in ten (21%) made the decision to visit the province less than two weeks before visiting.

Timing of Decision to Visit PEI	
More than 12 weeks prior	51%
Less than 2 weeks	21%
7-8 weeks prior	13%
3-4 weeks prior	6%
5-6 weeks prior	4%
Don't know/ Can't remember	3%
9-10 weeks prior	2%
Last minute decision	1%

Exhibit 4

Party Composition

Exhibit 5 shows that half of the overnight travel parties to the Kensington region of Prince Edward Island were comprised of families with children under the age of 18, followed by adults (one couple only) (28%), adults (two or more couples) and groups of friends/ adults traveling together (9% each), and single travellers (3%).

Party Composition

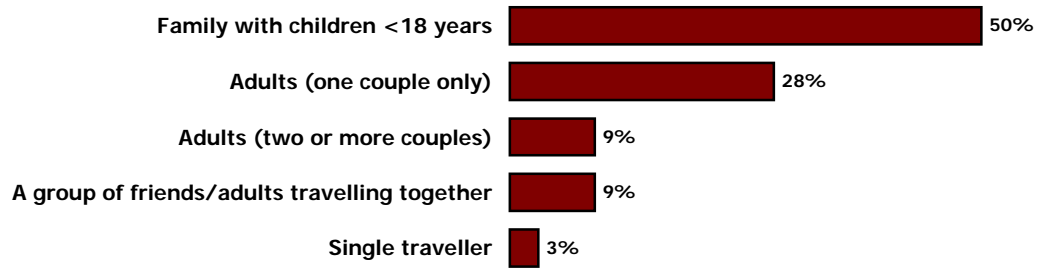


Exhibit 5

Expenditures

Parties whose main overnight destination was the Kensington region spent a total of \$12.5 million with an average of \$1066.19 per party. Approximately one-quarter of the total expenditure was spent on accommodations (26%), followed by meals (22%), groceries and souvenirs (12% each) (Exhibit 6).

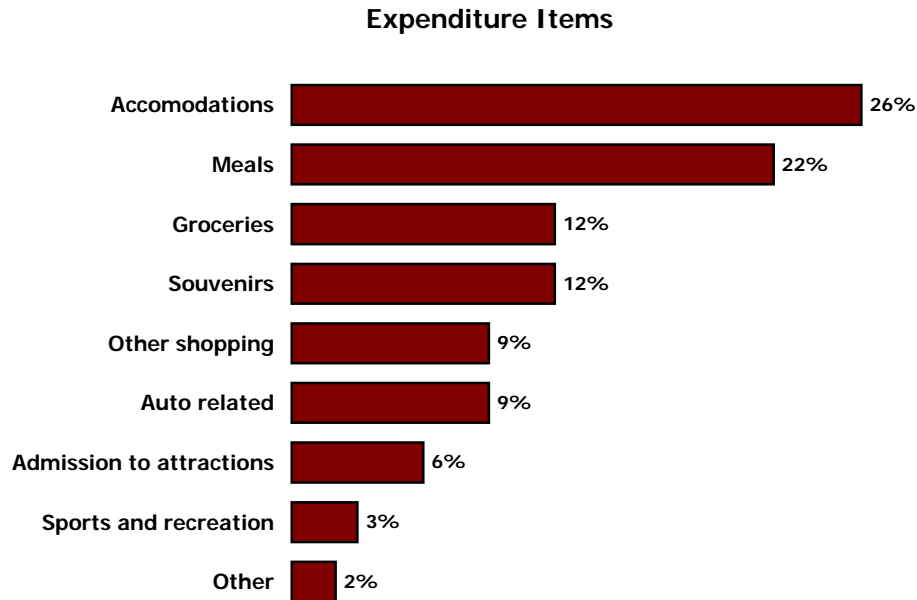


Exhibit 6

Demographics

Pleasure visitors who stayed overnight in the Kensington tourism region are profiled in Exhibit 7. These visitors were primarily between the ages of 30 and 49 (64%), had an annual salary of over \$35,000 and less than \$75,000 (56%), and were working full-time (74%). Overnight pleasure visitors to this region spent an average of 5.8 nights in Prince Edward Island.

Kensington Visitor Profile	
Age	
20-29 years	5%
30-39 years	32%
40-49 years	32%
50-59 years	6%
60-69 years	21%
70 years and older	5%
Household Income	
\$20,000-\$35,000	1%
\$35,000-\$50,000	31%
\$50,000-\$75,000	25%
\$75,000-\$100,000	14%
More than \$100,000	11%
Refused	18%
Employment Status	
Employed full-time	74%
Retired	22%
Homemaker	3%
Employed part-time	1%
Average Number of Nights in PEI	5.8

Exhibit 7

Visitor Activities

Beach visits represented the top activity enjoyed by pleasure visitors of the Kensington tourism region (88%), followed by sightseeing (76%), craft/ souvenir shopping (66%), driving tours (55%) and visiting a national park (54%) (Exhibit 8).

Kensington Visitor Activities*	
Beach visits	88%
Sightseeing	76%
Craft/ souvenir shopping	66%
Driving tour	55%
Visiting national park	54%
Visiting friends & relatives	48%
Shopping (general merchandise)	48%
Camping	43%
Lobster suppers	39%
Visiting Anne of Green Gables attractions	36%
Visiting historical/ cultural attractions	30%
Experiencing Acadian culture	30%
Confederation trail	27%
Fun/ theme parks	27%
Hiking	25%
Festivals/ events	23%
Canada's birthplace attractions	21%
Live theatre	20%
Bird watching	20%
Golf	18%
Founder's Hall	12%
Harbour/ city/ land tours	11%
Cycling	10%
Nightlife	10%
Boating/ canoeing/ kayaking/ sailing	10%
Deep sea/ salt water fishing	8%
Sports (participant)	6%
Sports (spectator)	5%
Other	1%

*Multiple Responses Allowed

Exhibit 8

6.6 Southern Kings Tourism Region

Visitor and economic impact information for the Southern Kings tourism region is based on 194 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 6.99\%$.

Overview

Based on the 2004 survey, it is estimated that 5% of all pleasure visitors to Prince Edward Island (approximately 14,502 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Southern Kings tourism region as their main overnight destination. Total expenditures in this region amounted to \$14.7 million.

Origin by Market

As shown in Exhibit 1, most overnight pleasure visitors to the Southern Kings tourism region originated from Nova Scotia (26%), Ontario (22%), or New Brunswick (15%).

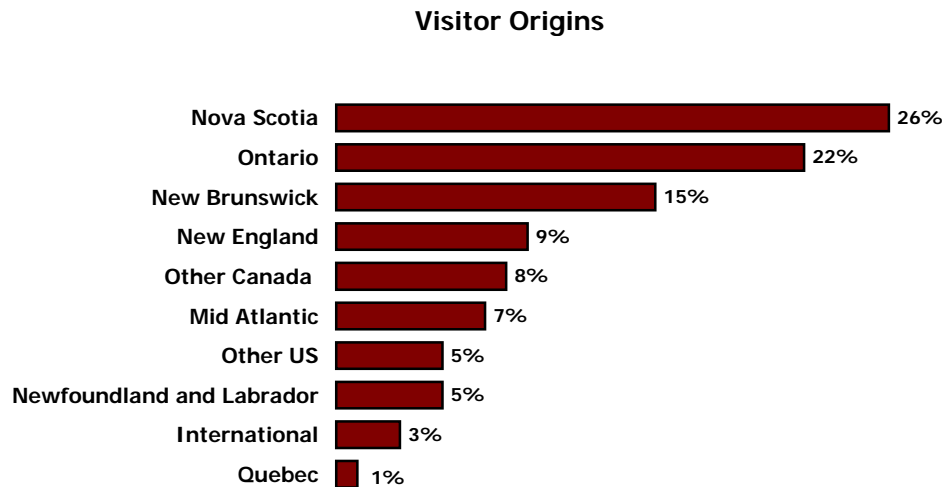


Exhibit 1

Past Visitation to Prince Edward Island

The majority of overnight pleasure visitors to the Southern Kings tourism region of Prince Edward Island were repeat visitors (65%), with first-time visitors equaling 35%.

Main Reason for Visiting Prince Edward Island

Exhibit 2 shows that overnight pleasure visitors to the Southern Kings tourism region visited Prince Edward Island primarily to see family/ friends/ relatives (30%), for sports related events (13%), or for the scenery/ landscape/ sightseeing and reasons of curiosity/ never been there before (at 9% each).

Main Reason for Visiting PEI

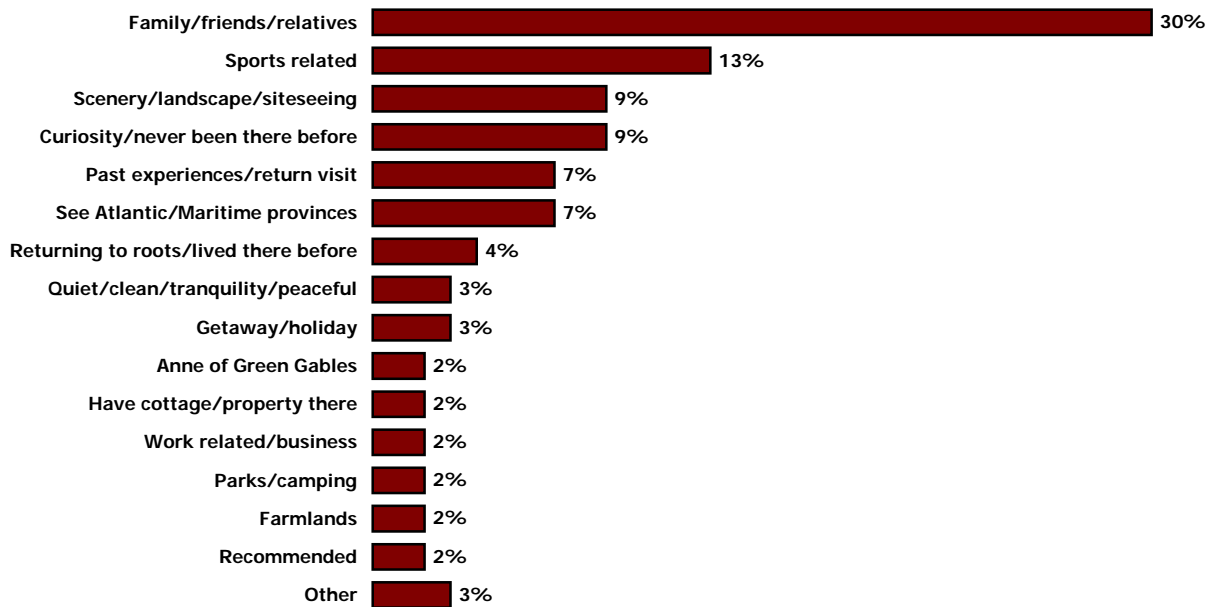


Exhibit 2

Main Overnight Accommodations

Eighty-four percent of overnight pleasure visitors to the Southern Kings tourism region stayed in paid accommodations, while 16% stayed with friends and relatives in non-paid accommodations. The main paid accommodation types included cabin/ cottage (30%), hotel/ motel/ resort (24%) and B & B/ Country Inn (13%) (Exhibit 3).

Main Type of Accommodation

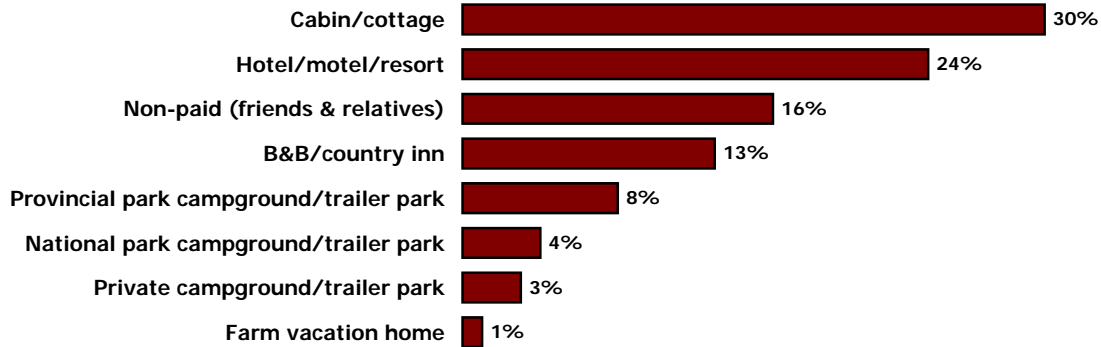


Exhibit 3

Timing of Decision to Visit Prince Edward Island

Close to half (45%) of overnight pleasure visitors to the Southern Kings tourism region decided to vacation in Prince Edward Island more than 12 weeks prior to visiting the province. A further 19% made this decision less than two weeks before visiting Prince Edward Island (Exhibit 4).

Timing of Decision to Visit PEI	
More than 12 weeks prior	45%
Less than 2 weeks prior	19%
5-6 weeks prior	12%
3-4 weeks prior	9%
7-8 weeks prior	6%
11-12 weeks prior	4%
Last minute decision	3%
9-10 weeks prior	2%

Exhibit 4

Party Composition

Party composition of overnight pleasure visitors to the Southern Kings tourism region is presented in Exhibit 5. Seventy-eight percent consisted of either adults (one couple only) or families with children under the age of 18 (39% each).

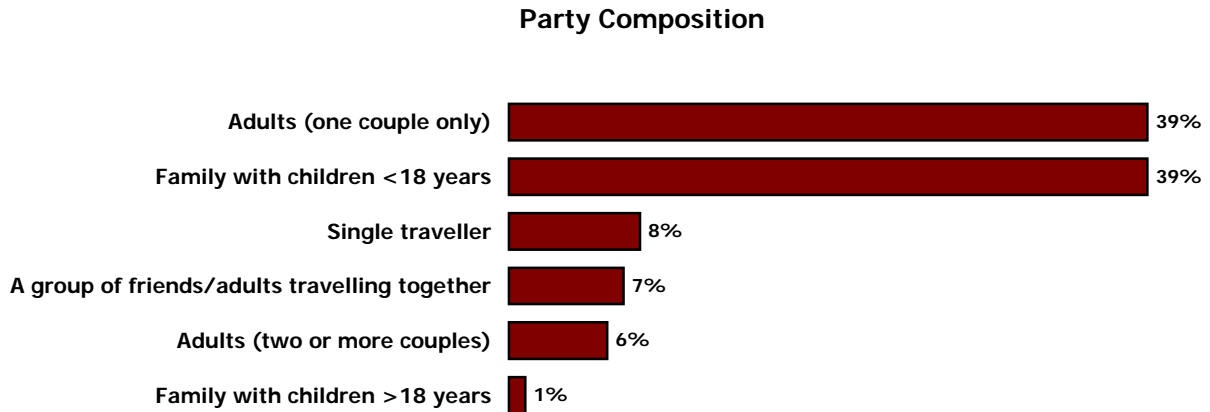


Exhibit 5

Expenditures

In 2004, overnight pleasure parties to the Southern Kings tourism region spent a total of \$14.7 million with an average of \$1007.92 per party. The main expenditure items (Exhibit 6) included accommodations (34%), and meals (21%).

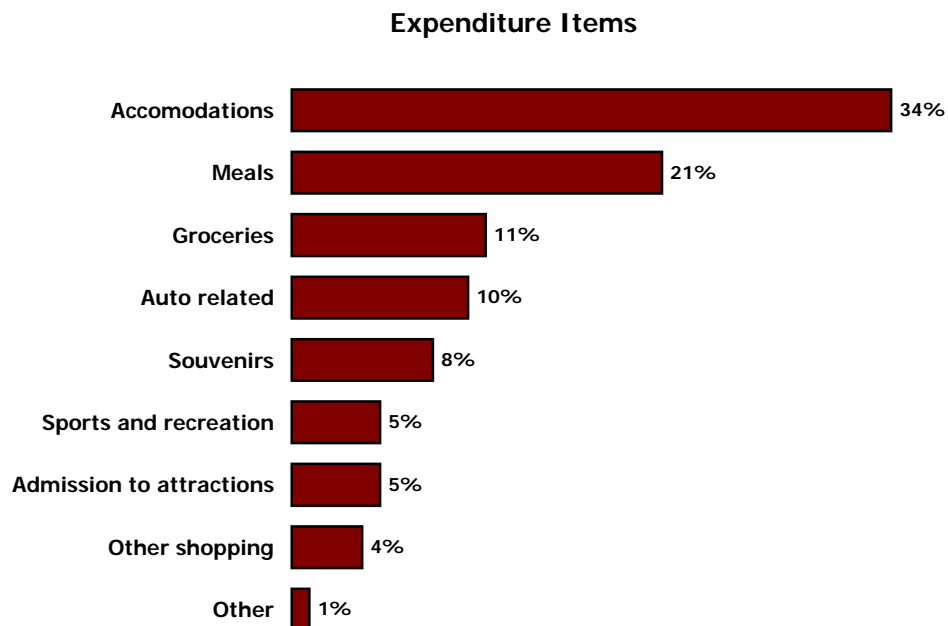


Exhibit 6

Demographics

Overnight pleasure visitors of the Southern Kings tourism region were primarily between the ages of 40 and 69 (75%), had an annual salary of over \$35,000 and up to \$100,000 (61%), and were working full-time (71%). Overnight pleasure visitors to this region spent an average of 5.2 nights in Prince Edward Island (Exhibit 7).

Southern Kings Visitor Profile	
Age	
Under 20 years	1%
20-29 years	4%
30-39 years	14%
40-49 years	28%
50-59 years	29%
60-69 years	18%
70 years and older	6%
Household Income	
Less than \$20,000	1%
\$20,000-\$35,000	7%
\$35,000-\$50,000	19%
\$50,000-\$75,000	22%
\$75,000-\$100,000	20%
More than \$100,000	16%
Refused	16%
Employment Status	
Employed full-time	71%
Retired	21%
Homemaker	5%
Employed part-time	3%
Average Number of Nights in PEI	5.2

Exhibit 7

Visitor Activities

As shown in Exhibit 8, the top five activities of overnight pleasure visitors to the Southern Kings tourism region included sightseeing (64%), beach visits (59%), visiting a national park (48%), craft/ souvenir shopping (45%), and shopping for general merchandise (43%).

Southern Kings Visitor Activities*	
Sightseeing	64%
Beach visits	59%
Visiting national park	48%
Craft/ souvenir shopping	45%
Shopping (general merchandise)	43%
Visiting friends & relatives	42%
Visiting historical/ cultural attractions	35%
Driving tour	28%
Visiting Anne of Green Gables attractions	26%
Canada's birthplace attractions	24%
Lobster suppers	23%
Confederation trail	23%
Golf	23%
Experiencing Acadian culture	20%
Bird watching	19%
Fun/ theme parks	15%
Hiking	15%
Festivals/ events	15%
Sports (participant)	14%
Founder's Hall	13%
Camping	12%
Harbour/ city/ land tours	11%
Cycling	10%
Live theatre	9%
Boating/ canoeing/ kayaking/ sailing	8%
Nightlife	7%
Sports (spectator)	5%
Deep sea/ salt water fishing	3%
Other	1%

*Multiple Responses Allowed.

Exhibit 8

6.7 South Shore Tourism Region

Visitor and economic impact information for the South Shore tourism region is based on 87 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 10.06\%$.

Overview

Based on the 2004 survey, it is estimated that 4% of all pleasure visitors to Prince Edward Island (approximately 9,984 visitors) between the period of May 1, 2004 and October 31, 2004 reported the South Shore tourism region as their main overnight destination. Expenditures in this region totaled \$9.5 million.

Origin by Market

As shown in Exhibit 1, the majority of overnight pleasure visitors to the South Shore tourism region of Prince Edward Island were either from Ontario (31%), Nova Scotia (26%), New Brunswick or New England (12% each).

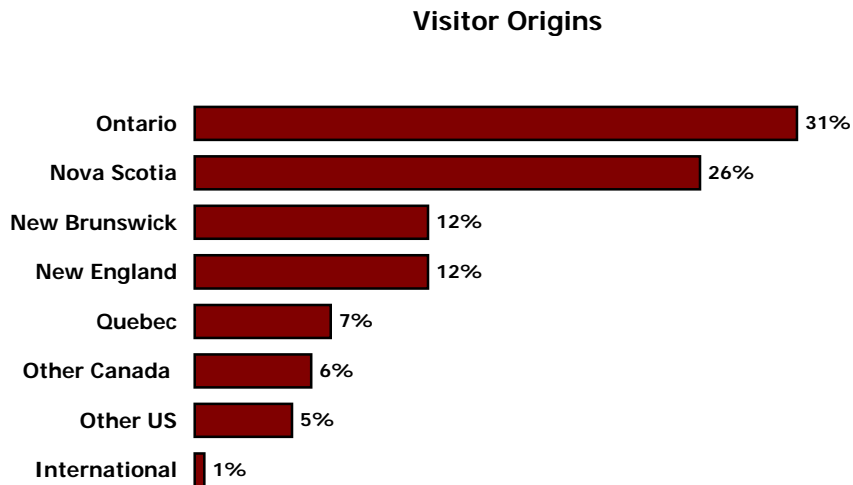


Exhibit 1

Past Visitation to Prince Edward Island

Eight in ten overnight pleasure visitors to the South Shore tourism region were repeat visitors to Prince Edward Island. Two in ten visitors indicated that this was their first trip to the Island.

Main Reason for Visiting Prince Edward Island

In 2004, the main reasons South Shore pleasure visitors vacationed in Prince Edward Island were family/ friends/ relatives (45%), past experiences/ return visit (13%) and curiosity/ never been there before (11%) (Exhibit 2).

Main Reason for Visiting PEI

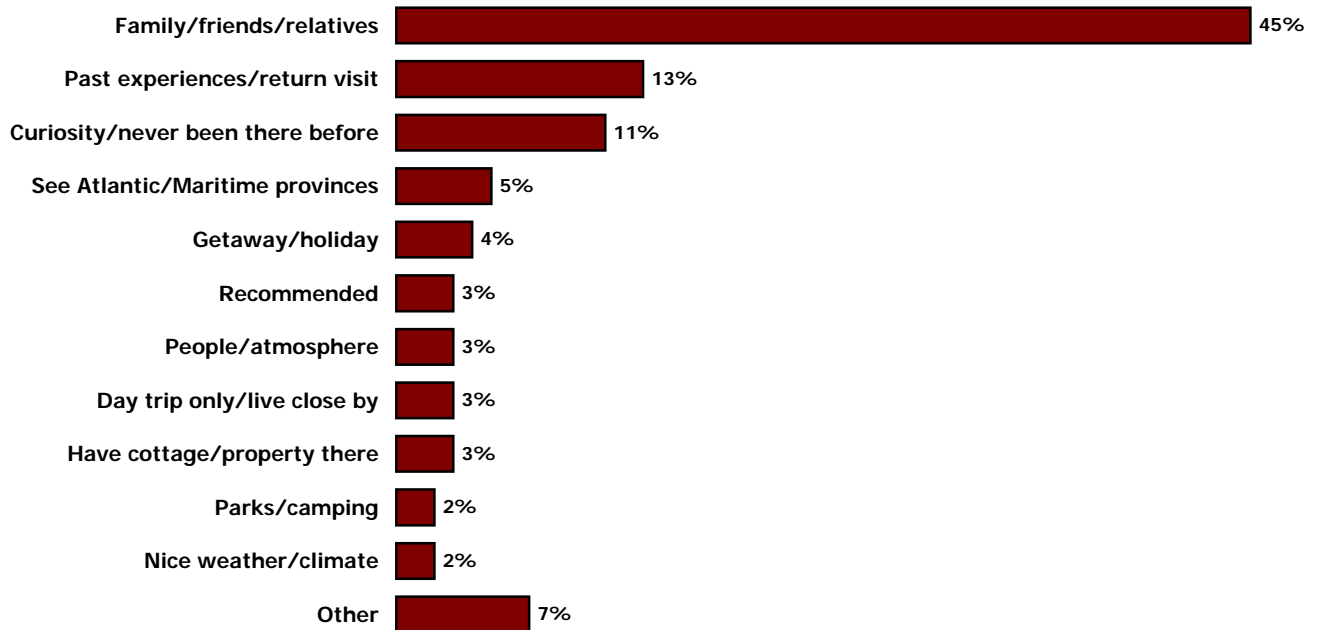


Exhibit 2

Main Overnight Accommodations

Exhibit 3 shows that approximately three in ten (28%) overnight visitors to the South Shore tourism region stayed in non-paid accommodations with friends and relatives. Seventy-two percent stayed in paid accommodations with 36% who stayed in a cabin/ cottage or a private campground/ trailer park (18% each), followed by a hotel/ motel/ resort (14%) or a B & B/ Country Inn (12%).

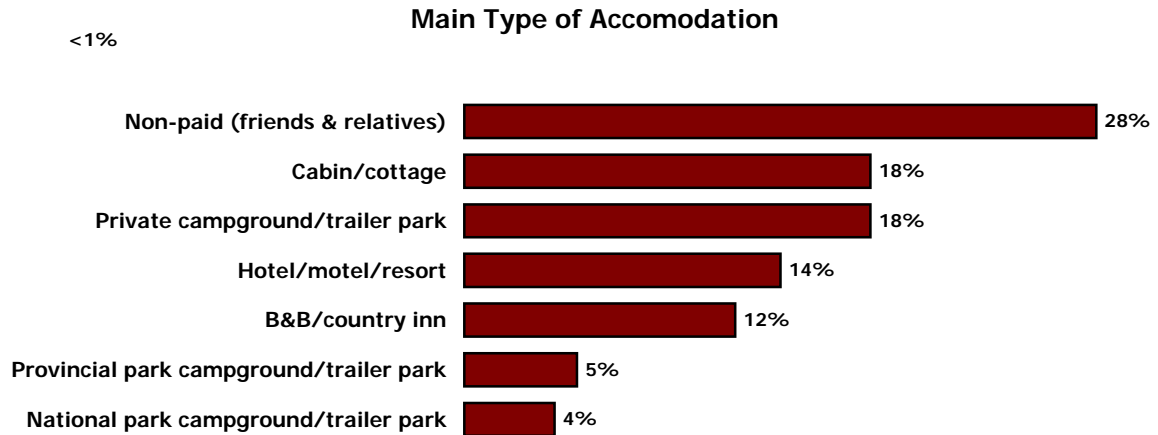


Exhibit 3

Timing of Decision to Visit Prince Edward Island

Approximately four in ten (41%) overnight pleasure visitors to the South Shore tourism region of Prince Edward Island made their decision to visit the province more than 12 weeks before arrival (Exhibit 4).

Timing of Decision to Visit PEI	
More than 12 weeks prior	41%
Less than 2 weeks prior	18%
7-8 weeks prior	18%
3-4 weeks prior	7%
11-12 weeks prior	5%
5-6 weeks prior	4%
9-10 weeks prior	3%
Last minute decision	3%

Exhibit 4

Party Composition

As shown in Exhibit 5, slightly more than half (52%) of pleasure visitors to the South Shore tourism region of Prince Edward Island were adults (one couple only), followed by families with children under 18 years of age (30%), adults consisting of two or more couples (8%), groups of friends/ adults traveling together (6%) and single travellers (4%).

Party Composition

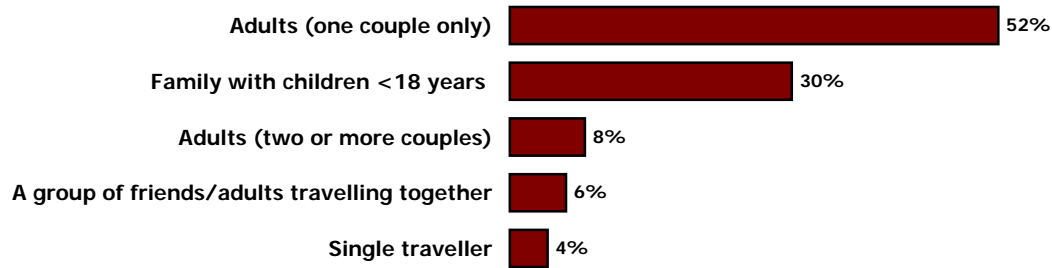


Exhibit 5

Expenditures

In 2004, overnight pleasure parties to the South Shore tourism region spent a total of \$9.5 million with an average of \$782.77 per party. Approximately 39% of total expenditures were spent on accommodations, 20% on meals, and 10% on groceries and auto related expenses (Exhibit 6).

Expenditure Items

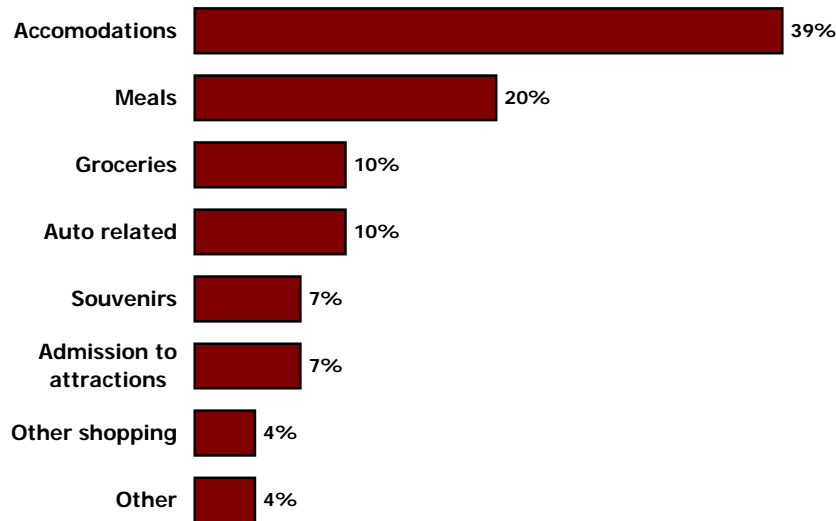


Exhibit 6

Demographics

Overnight pleasure visitors to the South Shore tourism region are profiled in Exhibit 7. The majority of visitors were between the ages of 40 and 69 (70%), had an annual salary of over \$35,000 and up to \$75,000 (52%), and were working full-time (62%). Overnight pleasure visitors to this region spent an average of 6.6 nights in Prince Edward Island.

South Shore Visitor Profile	
Age	
20-29 years	8%
30-39 years	17%
40-49 years	22%
50-59 years	28%
60-69 years	20%
70 years and older	6%
Household Income	
\$20,000-\$35,000	7%
\$35,000-\$50,000	14%
\$50,000-\$75,000	38%
\$75,000-\$100,000	10%
More than \$100,000	10%
Refused	22%
Employment Status	
Employed full-time	62%
Retired	25%
Employed part-time	8%
Employed seasonally	3%
Homemaker	2%
Refused	1%
Average Number of Nights in PEI	6.6

Exhibit 7

Visitor Activities

As Exhibit 8 shows, the most common activities enjoyed by overnight pleasure visitors to the South Shore tourism region included beach visits (70%), sightseeing (61%), visiting family and friends (51%), craft/ souvenir shopping (48%), visiting Anne of Green Gables attractions and visiting a national park (41% each).

South Shore Visitor Activities*	
Beach visits	70%
Sightseeing	61%
Visiting friends & relatives	51%
Craft/ souvenir shopping	48%
Visiting Anne of Green Gables attractions	41%
Visiting national park	41%
Shopping (general merchandise)	40%
Visiting historical/ cultural attractions	36%
Lobster suppers	32%
Camping	30%
Driving tour	22%
Experiencing Acadian culture	22%
Canada's birthplace attractions	20%
Live theatre	19%
Hiking	17%
Golf	15%
Founder's Hall	15%
Bird watching	14%
Confederation trail	13%
Nightlife	11%
Boating/ canoeing/ kayaking/ sailing	11%
Harbour/ city/ land tours	9%
Festivals/ events	9%
Deep sea/ salt water fishing	8%
Fun/ theme parks	7%
Cycling	5%
Sports (participant)	4%
None	2%
Other	1%

*Multiple Responses Allowed

Exhibit 8

6.8 Summerside Tourism Region

Visitor and economic impact information for the Summerside tourism region is based on 224 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 6.51\%$

Overview

Based on the 2004 survey, it is estimated that 7% of all pleasure visitors to Prince Edward Island (approximately 20,783 visitors) between the period of May 1, 2004 and October 31, 2004 reported the Summerside tourism region as their main overnight destination. Total expenditures in this region equaled \$18.3 million.

Origin by Market

In 2004, most overnight pleasure visitors to the Summerside tourism region of Prince Edward Island (Exhibit 1) originated from either Ontario (26%) or New Brunswick (25%).

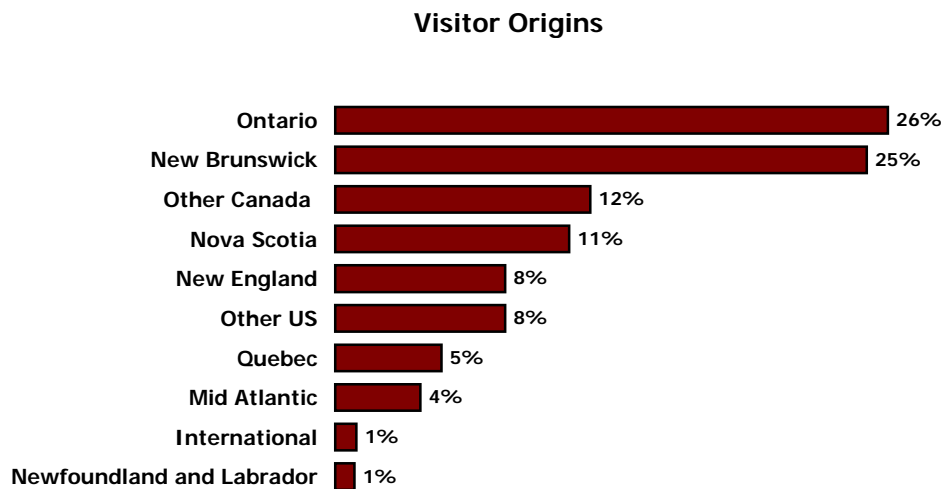


Exhibit 1

Past Visitation to Prince Edward Island

The majority of overnight pleasure visitors to the Summerside tourism region were repeat visitors to Prince Edward Island (63%). First time visitors accounted for the remaining 37%.

Main Reason for Visiting Prince Edward Island

As shown in Exhibit 2, the primary reasons for visiting Prince Edward Island as expressed by overnight pleasure visitors to the Summerside tourism region included family/ friends/ relatives (28%), and curiosity/ never been there before (18%). Furthermore, past experiences/ return visit and scenery/ landscape and sightseeing each accounted for 10%.

Main Reason for Visiting PEI

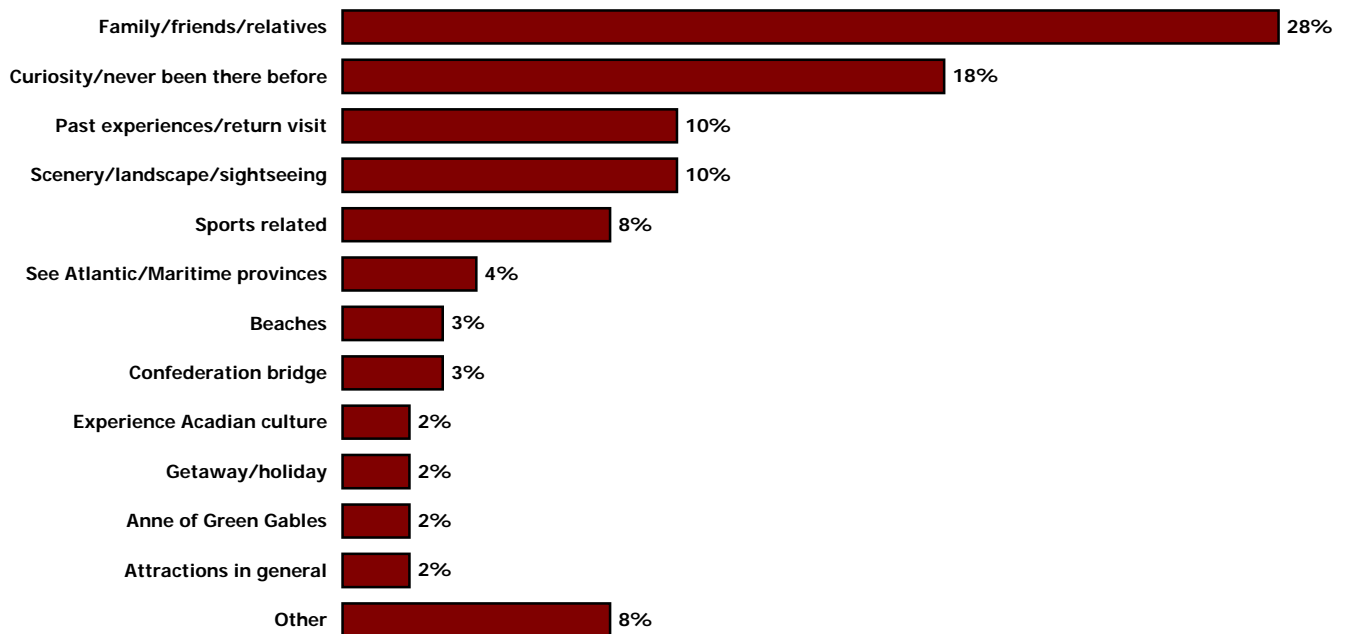


Exhibit 2

Main Overnight Accommodations

Approximately three-quarters (77%) of overnight visitors to the Summerside tourism region stayed in paid accommodations with most (52%) staying at a hotel/ motel/ resort. A further 23% chose to stay in non-paid accommodations (Exhibit 3).

Main Type of Accommodation

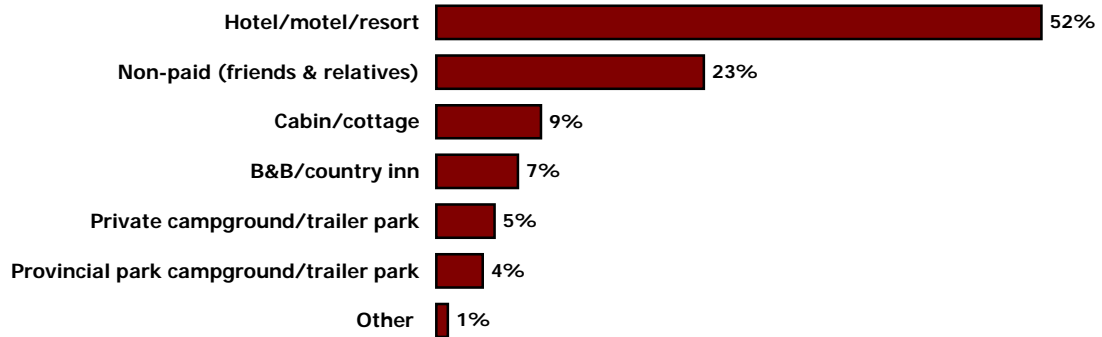


Exhibit 3

Timing of Decision to Visit Prince Edward Island

Approximately half (48%) of overnight pleasure visitors to the Summerside tourism region made their decision to visit Prince Edward Island more than 12 weeks before visiting (Exhibit 4).

Timing of Decision to Visit PEI	
More than 12 weeks prior	48%
Less than 2 weeks prior	14%
3-4 weeks prior	10%
11-12 weeks prior	9%
7-8 weeks prior	5%
9-10 weeks prior	5%
Last minute decision	5%
5-6 weeks prior	4%

Exhibit 4

Party Composition

As shown in Exhibit 5, close to half (46%) of the overnight pleasure visitors to the Summerside tourism region of Prince Edward Island were adult couples (one couple only), followed by families with children under the age of 18 (26%), groups of friends/ adults traveling together (15%), single travellers (9%), and adults consisting of two or more couples (5%).

Party Composition

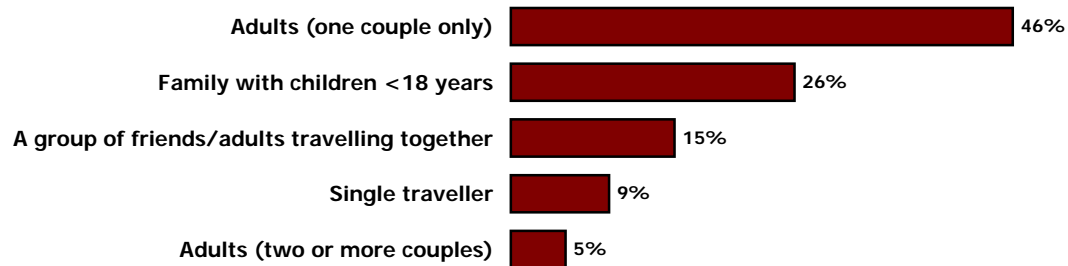


Exhibit 5

Expenditures

In 2004, overnight pleasure parties to the Summerside tourism region spent a total of \$18.3 million with an average of \$776.20 per party. As shown in Exhibit 6, accommodations accounted for 31% of total expenditures, while meals accounted for 20% and auto related expenses accounted for 13%.

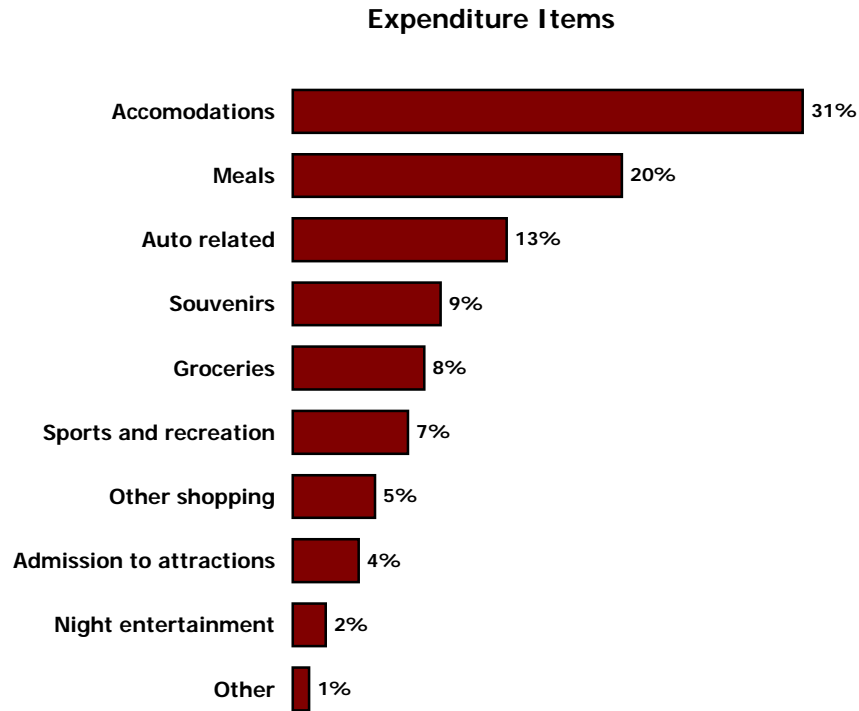


Exhibit 6

Demographics

The majority of overnight pleasure visitors to the Summerside tourism region were between the ages of 40 and 69 (73%), had an annual salary of over \$35,000 and up to \$75,000 (41%), and were working full-time (60%). Overnight pleasure visitors to this region spent an average of 4.1 nights in Prince Edward Island (Exhibit 7).

Summerside Visitor Profile	
Age	
20-29 years	3%
30-39 years	14%
40-49 years	24%
50-59 years	26%
60-69 years	23%
70 years and older	10%
Household Income	
Less than \$20,000	2%
\$20,000-\$35,000	12%
\$35,000-\$50,000	22%
\$50,000-\$75,000	19%
\$75,000-\$100,000	12%
More than \$100,000	15%
Refused	18%
Employment Status	
Employed full-time	60%
Retired	26%
Employed part-time	10%
Homemaker	2%
Unemployed	2%
Employed seasonally	1%
Average Number of Nights in PEI	4.1

Exhibit 7

Visitor Activities

Overnight pleasure visitors to the Summerside tourism region participated in a variety of activities (Exhibit 8). The top five activities included sightseeing (69%), craft/ souvenir shopping (64%), beach visits (55%), and visiting a national park and driving tours (43% each).

Summerside Visitor Activities*	
Sightseeing	69%
Craft/ souvenir shopping	64%
Beach visits	55%
Visiting national park	43%
Driving tour	43%
Visiting historical/ cultural attractions	39%
Visiting Anne of Green Gables attractions	38%
Shopping (general merchandise)	38%
Lobster suppers	35%
Visiting friends & relatives	28%
Festivals/ events	27%
Experiencing Acadian culture	27%
Canada's birthplace attractions	26%
Confederation trail	21%
Fun/ theme parks	17%
Golf	13%
Nightlife	13%
Bird watching	12%
Live theatre	12%
Founder's Hall	9%
Camping	8%
Sports (participant)	8%
Harbour/ city/ land tours	7%
Hiking	7%
Boating/ canoeing/ kayaking/ sailing	6%
Sports (spectator)	4%
Deep sea/ salt water fishing	2%
None	2%
Cycling	2%
Other	4%

*Multiple Responses Allowed

Exhibit 8

6.9 West Prince Tourism Region

Visitor and economic impact information for the West Prince tourism region is based on 93 responses. With this sample size, there is a 95% level of confidence that the values are accurate within a range of $\pm 10.12\%$.

Overview

Based on the 2004 survey, it is estimated that 4% of all pleasure visitors to Prince Edward Island (approximately 11,586 visitors) between the period of May 1, 2004 and October 31, 2004 reported the West Prince tourism region as their main overnight destination. Total expenditures in this region amounted to \$8.2 million.

Origin by Market

As shown in Exhibit 1, the majority of overnight pleasure visitors to the West Prince tourism region in 2004 originated either from New Brunswick, Nova Scotia or Ontario (23% each).

Visitor Origins

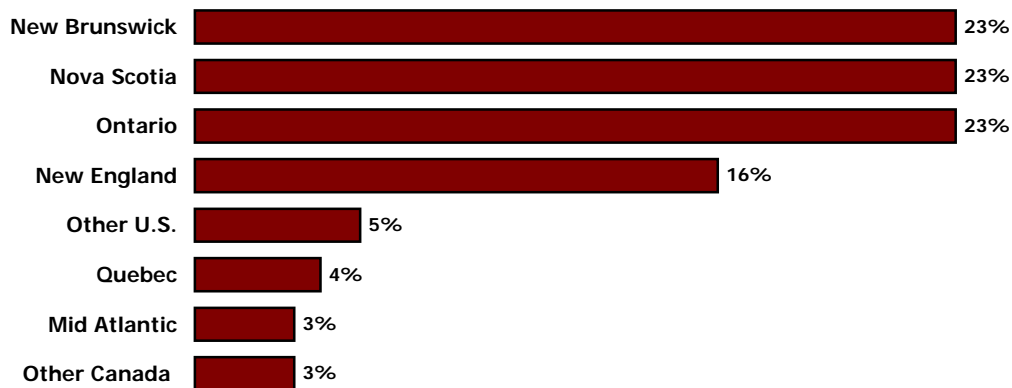


Exhibit 1

Past Visitation to Prince Edward Island

The majority (72%) of overnight pleasure visitors to the West Prince tourism region reported that they were repeat visitors. Twenty-eight percent were first-time visitors to PEI.

Main Reason for Visiting Prince Edward Island

The main travel motives of overnight pleasure visitors to the West Prince tourism region included family/ friends/ relatives (31%), curiosity/ never been there before (20%), and past experiences /return visit and returning home to roots/ lived there before (13% each) (Exhibit 2).

Main Reason for Visiting PEI

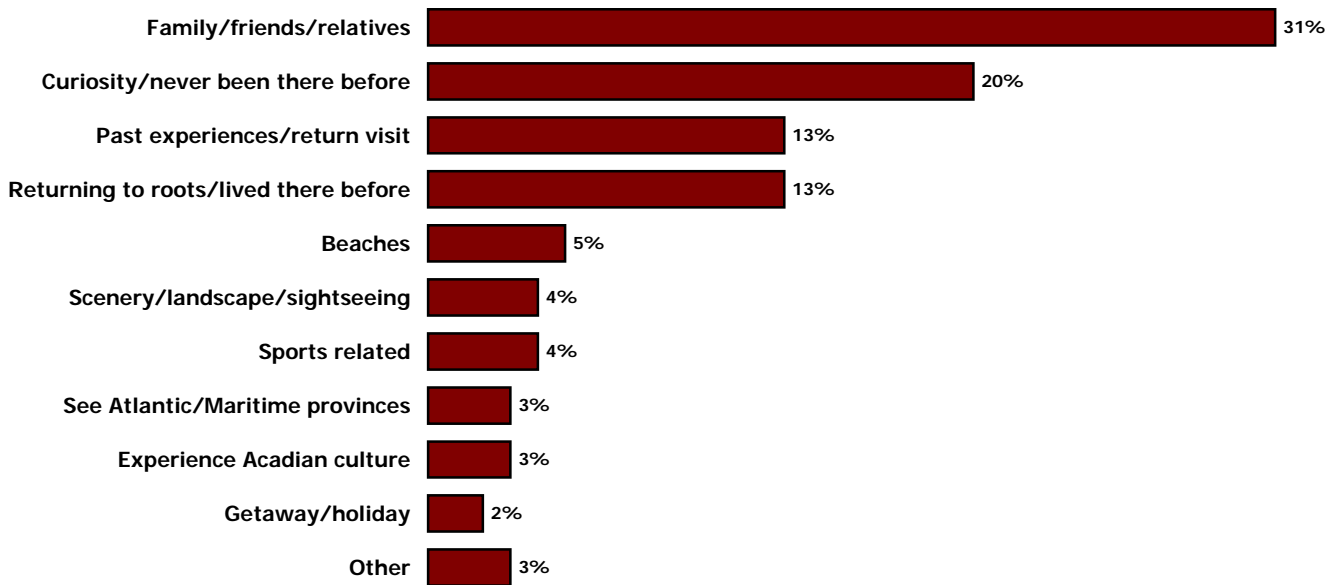


Exhibit 2

Main Overnight Accommodations

As Exhibit 3 shows, three in ten overnight visitors to the West Prince tourism region stayed in non-paid accommodations with friends and relatives. Of those who stayed in paid accommodations, most either stayed in a cabin/ cottage (22%) or a hotel/ motel/ resort (19%).

Main Type of Accomodation

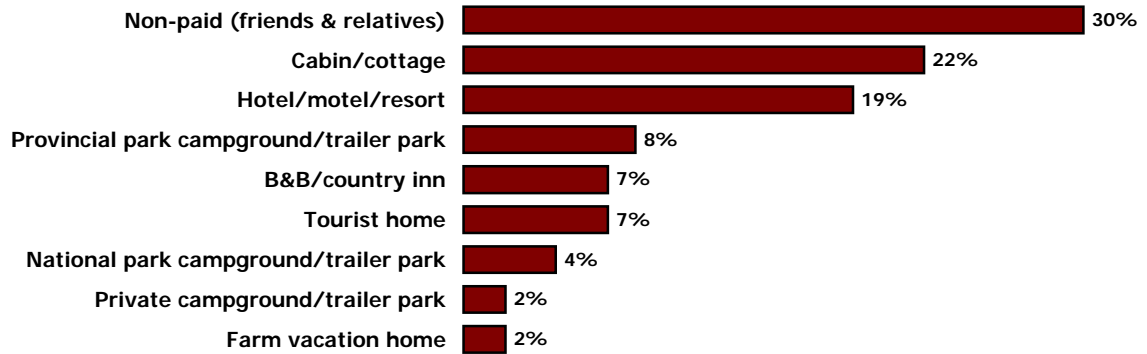


Exhibit 3

Timing of Decision to Visit Prince Edward Island

Thirty-six percent of overnight pleasure visitors to the West Prince tourism region made their decision to visit Prince Edward Island more than 12 weeks before their arrival. A further 18% made this decision two weeks prior to visiting the province (Exhibit 4).

Timing of Decision to Visit PEI	
More than 12 weeks prior	36%
Less than 2 weeks prior	18%
3-4 weeks prior	13%
7-8 weeks prior	12%
11-12 weeks prior	11%
Last minute decision	6%
9-10 weeks prior	3%
5-6 weeks prior	2%

Exhibit 4

Party Composition

As shown in Exhibit 5, most (46%) overnight pleasure visitors to the West Prince tourism region were adult couples (one couple only), followed by families with children under the age of 18 (25%), adults consisting of two or more couples (10%), groups of friends/ adults traveling together (9%), single travellers (8%), and families with children over the age of 18 (3%).

Party Composition

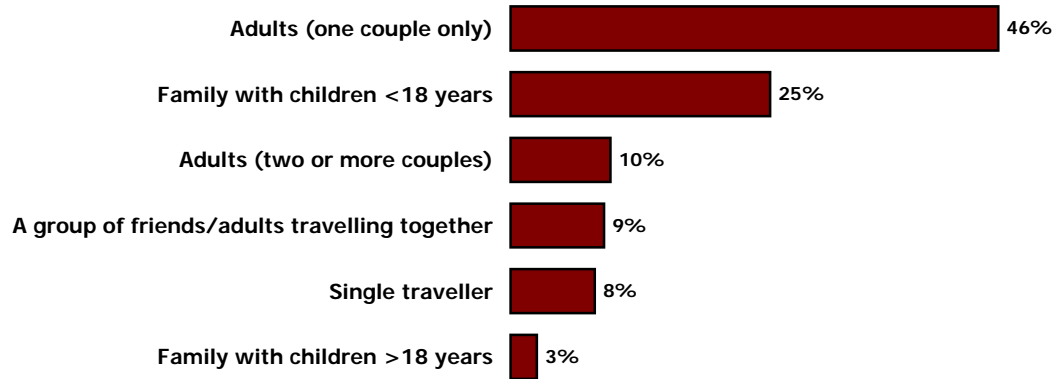


Exhibit 5

Expenditures

In 2004, the total and average expenditures for overnight pleasure parties to the West Prince tourism region were \$8.2 million and \$697.59, respectively. As Exhibit 6 shows, accommodations accounted for 37% of total expenditures, meals and auto related expenses accounted for 17% each, and groceries accounted for 11%.

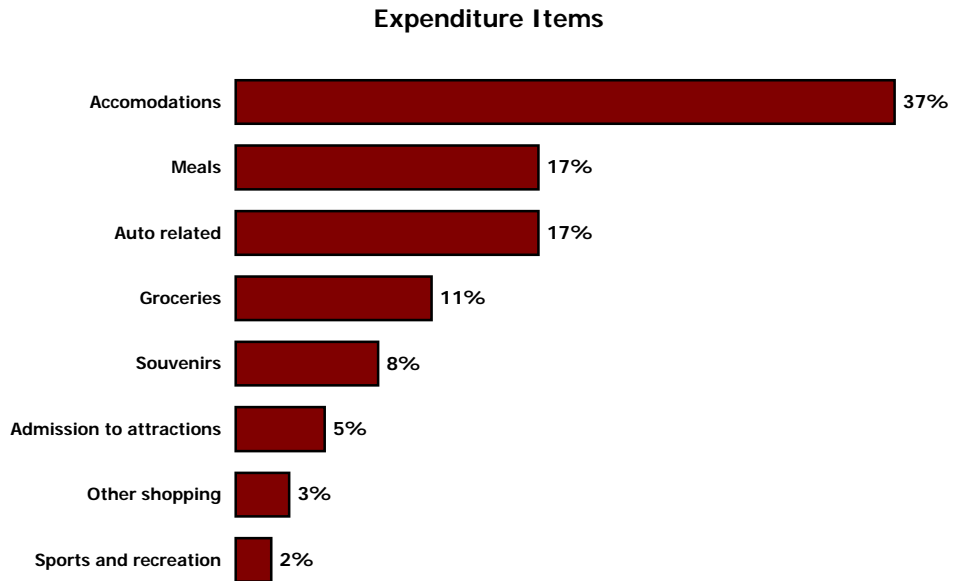


Exhibit 6

Demographics

West Prince overnight pleasure visitors are profiled in Exhibit 7. The majority of visitors (66%) were between the ages of 40 and 59, had an annual salary of over \$35,000 to up to \$75,000 (64%), and were working full-time (69%). West Prince overnight pleasure visitors spent an average of 4.5 nights in Prince Edward Island.

West Prince Visitor Profile	
Age	
20-29 years	2%
30-39 years	16%
40-49 years	30%
50-59 years	36%
60-69 years	12%
70 years and older	5%
Household Income	
\$20,000-\$35,000	5%
\$35,000-\$50,000	34%
\$50,000-\$75,000	30%
\$75,000-\$100,000	6%
More than \$100,000	10%
Refused	16%
Employment Status	
Employed full-time	69%
Retired	25%
Employed part-time	6%
Employed seasonally	1%
Average Number of Nights in PEI	4.5

Exhibit 7

Visitor Activities

The top five activities of visitors to West Prince tourism region were sightseeing (63%), beach visits (53%), craft/ souvenir shopping (53%), visiting friends and relatives (50%), and participating in a driving tour (33%) (Exhibit 8).

West Prince Visitor Activities	
Sightseeing	63%
Beach visits	53%
Craft/ souvenir shopping	53%
Visiting friends & relatives	50%
Driving tour	33%
Visiting historical/ cultural attractions	26%
Lobster suppers	25%
Shopping (general merchandise)	24%
Visiting national park	24%
Visiting Anne of Green Gables attractions	22%
Festivals/ events	19%
Golf	17%
Hiking	17%
Confederation trail	16%
Camping	16%
Experiencing Acadian culture	15%
Fun/ theme parks	15%
Harbour/ city/ land tours	14%
Cycling	12%
Bird watching	10%
Deep sea/ salt water fishing	10%
Boating/ canoeing/ kayaking/ sailing	9%
Live theatre	9%
Sports (participant)	7%
Canada's birthplace attractions	7%
Nightlife	6%
Passing through only	5%
None	2%
Other	4%

*Multiple Responses Allowed

Exhibit 8