SCENIC DRIVE TOURISM:

THE RESULTS OF A SURVEY OF THE TRAVELLERS VOICE RESEARCH PANEL

Prepared by:

The Tourism Research Centre
School of Business
University of PEI

Date: April 30, 2009

TABLE OF CONTENTS

SUMMARY OF REPORT

The Scenic Drive tourism survey was designed by the Tourism Research Centre at the University of Prince Edward Island to complement previous research about PEI's Blue Heron Drive and the North Cape Coastal Drive, and to gather information on scenic drives overall. The survey consisted of two components. The first section was designed to collect information about scenic drives in general. The second section was designed to collect information about scenic drives in PEI. If travellers reported having taken a scenic drive in PEI, they were asked questions that were specific to that trip to PEI and to the scenic drives in PEI.

The general results indicated that almost all respondents (98.3 percent) sometimes or always take a scenic drive when on a pleasure trip. Travellers do not seem to discriminate between official and unofficial scenic drives, as 80.8 percent do both. Scenic drives play a role in the choice of a vacation destination but they are not necessarily the primary motivating factor. Scenic drives accounted for 52.2 percent of the decision to visit a destination, highlighting that scenic driving tours are a popular tourist product. However, scenic drives are the primary reason for travel to a destination for only 15.4 percent of respondents. Further to this, 43.5 percent of respondents research scenic drives *after* the destination is chosen.

With the vacation destination chosen, travellers tend to research drives both before (74.4 percent) and after (85.9 percent) arriving at their destination. The most popular information sources are visitor information centres and official travel guides/brochures. Shorter drives (up to 5 hours in length) are the most popular among travellers, with 4 to 5 hours the most preferred. The primary reasons for taking scenic drives are to observe the scenery and to travel to noteworthy attractions. Travellers are most interested in drives that include access to and views of coastlines, lakes and rivers, and mountains and alpine areas.

The results specific to travellers to PEI indicated that 64.5 percent of visitors took an official scenic drive in PEI. Among these travellers, the North Cape Coastal Drive was the most popular. August was the most popular month for these respondents to visit PEI, followed by the summer shoulder season (September and October). Aside from sightseeing/driving tour, the top activities participated in by travellers who took scenic drives in PEI were shopping for local crafts/souvenirs/antiques, going to a beach, and visiting historical and cultural attractions.

Visitors to PEI are happy with the scenic drives in the province compared to scenic drives overall. This is highlighted by a few comparison statements in which PEI scored higher: "the scenic drives I take are an excellent reason to visit" (6.19 for PEI versus 5.45 for other destinations), "there is sufficient signage on the scenic drive" (6.03 versus 5.30), "the scenic drives are a good way to spend some of my time" (6.41 versus 6.01), and "there is enough to see and do to spread the drive over multiple days" (6.06 versus 4.44). One statement, "the scenic drives on PEI are unique among the driving tours I have taken," was rated much more favourably by Canadian and American respondents versus respondents from other countries.

IMPLICATIONS FOR STAKEHOLDERS

The main purpose of this study was to explore the propensity for scenic drive tourism. The study illustrates the importance of scenic drive tourism. The vast majority of travellers normally take scenic drives at a destination while travelling and scenic drives accounted for 52.2 percent of the decision to visit a particular destination. As a tourism product, scenic drives are critically important in influencing tourism visitation and the flow of tourists to a destination.

Despite their importance and popularity as a destination's tourism product, scenic drives are not necessarily the primary motivating factor in choosing a destination. Taking a scenic drive is primarily an activity that is chosen and/or researched after the decision has been made to travel to a particular destination. That is, scenic drives are more often incorporated into the plan of 'things to do' at the destination as opposed to being the primary reason for planning the trip. Scenic drive marketing is therefore especially important *at the destination*, particularly at visitor information centres, one of the most used sources of information. It is also important for information about the scenic drives to be readily available on the Internet, such as on the official website of the destination and on the website of the scenic drive, and in official travel guides, all of which may be reviewed prior to travel.

People generally like to have information about the scenic drive with them as they travel on the drive; therefore it is crucial that maps and detailed handbooks about them are available at visitor information centres and other points of interest. For visitors to PEI, aside from sightseeing and driving tours, shopping for local crafts/souvenirs/antiques, going to the beach, and visiting historical and cultural attractions are popular activities. It would be useful to better advertise these types of attractions and points of interest.

Given that the summer months, particularly July and August, are the most popular months to visit PEI, an opportunity for scenic drive tourism in the province is to use the summer to market fall foliage scenic drives in late September and in October. Fall foliage is a heavily marketed tourism product in other areas such as Vermont and New Hampshire. It has the potential to attract the retired segment of the market who may prefer to experience the Island's scenery and natural landscape without the presence of summer tourists.

When visiting a destination, travellers prefer to take the shorter scenic drives (five hours or less). Given this preference, there is an opportunity in PEI for the design of shorter routes for specific activities of interest such as walking trails, craft shops and local shopping, historical attractions, etc.

1. INTRODUCTION

1.1 Background

In mid 2007 the Tourism Research Centre at UPEI launched a "blind," non-branded travelling panel called the "Traveller's Voice." This panel was one need identified in meetings held with tourism industry stakeholders and the TRC in 2006. The various tourism organizations have a variety of research needs, require answers in a timely manner, and have a limited amount of resources available. There was a need to have a research platform that has the capability to handle many research requests without the high cost of the PEI Visitor Exit Survey.

To respond to those needs, the TRC launched the Traveller's Voice, a proprietary online panel that allowed all stakeholders in the industry, in both the private and public sectors, to suggest questions or topics that could then be put to a large sample of travellers. Members were contacted monthly as new studies were launched. In general, the response rate for panels is about 50 percent so a relatively large sample can be collected rapidly at relatively little cost.

The Traveller's Voice is populated by those who travel. Originally, it was a "non-branded" panel and those completing the surveys did not know the identity of the surveyor; they simply knew they were surveys about travel. Direct questions concerning PEI were not included. However, panelists who selected PEI in a response to a question were occasionally asked follow up questions requesting more detail. It was important that the province's identity not be divulged to panel members in the Traveller's Voice as that knowledge could have affected how panel members answered the various surveys.

The first survey was released in mid July 2007. Prior to being able to complete surveys, travellers were required to fill out a profiling questionnaire determining if they qualified to join the panel. Panelists must have taken at least one pleasure trip in the past two years of at least four nights and be at least 18 years old.

At the present time, this version of the Traveller's Voice has been suspended to focus on a new PEI-branded panel designed specifically for recent travellers to PEI. The names and profiles of the old Traveller's Voice members have been retained and those panel members who have been to PEI have been invited to join the new PEI branded panel.

1.2 Objectives of the Study

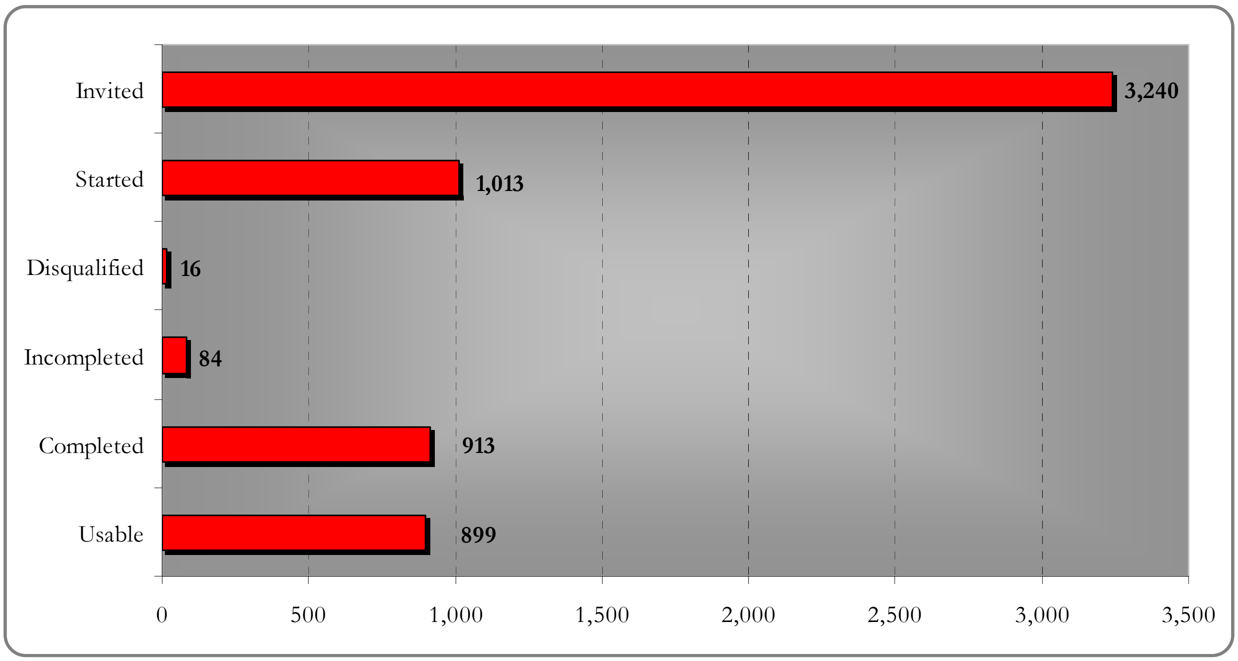
The TRC has previously been involved with two pieces of research regarding scenic drives in PEI – the Blue Heron Drive and the North Cape Coastal Drive. The Traveller's Voice Scenic Drive survey was developed on behalf of Tourism PEI to complement this previous research and to acquire travellers' perspectives on scenic drives in general. To keep results simple and comparable, many of the questions used in this panel survey were recycled from the two previous scenic drive surveys, with some modifications. However, given the nature of the panel and the ability to route participants down different paths based on their selected responses, there was a PEI specific portion for travellers who had taken a leisure/scenic drive in PEI in the past 18 months.

2. METHODOLOGY

The survey was conducted from November 9 to November 30, 2007 on the Traveller's Voice – a blind, non-branded panel. As shown in Figure 2.1, 3,240 members were invited to the study. The survey was sent to French-speaking panelists, although the survey had not been translated into French due to time constraints. Reminder emails were sent on November 19 and November 26 to panelists who had not begun the survey.

As a result, 1,013 panelists (31.3 percent) started the survey and 913 completed the survey. Overall, 899 surveys were used for this report; 14 were omitted as they had been completed by PEI residents. In terms of statistical accuracy, a sample of this size has a sampling error of 3.2% at a 95% confidence level. That is, if all visitors to PEI were surveyed, we would be 95% confident that the results presented in this report would fall within a range of plus or minus 3.2% of the results of surveys of all visitors. An alternative way to view this statistical concept is that if the same survey were conducted 100 times, the results in this report would fall within a range of plus or minus 3.2% 95 times out of the 100 times the survey was conducted.

Figure 2.1 Panel Participation Statistics



Note: Disqualified indicates respondents who never take scenic drives when they travel using a vehicle and Usable excludes the respondents who lived in PEI (14 surveys).

As presented in Table 2.1, the average completion time for the survey was about 15 minutes (median 10 minutes) and completion rate was 90.1 percent, based on the 929 surveys including the disqualified.

Table 2.1 Survey Participation Rates and Completion Time Statistics

Survey Participation Rate		Completion Time Statistics	
Participation Rate	**31.3%**	Shortest Study Completion Time	2 Min 37 Sec
Completion Rate	90.1%	Average Study Completion Time	**14 Min 33 Sec**
Incompletion Rate	8.3%	Longest Study Completion Time	1 D 6 Hr 3 Min 28 Sec
Usage Rate [a]	98.5%	Median Study Completion Time	**9 Min 30 Sec**

Note: Usable surveys excludes the respondents who lived in PEI (14 surveys) and usage rate was calculated based on the number of surveys completed (913 surveys).

3. SAMPLE CHARACTERISTICS

Table 3.1 shows demographic characteristics of the survey sample by country of residence. A total of 899 surveys were used for this study.

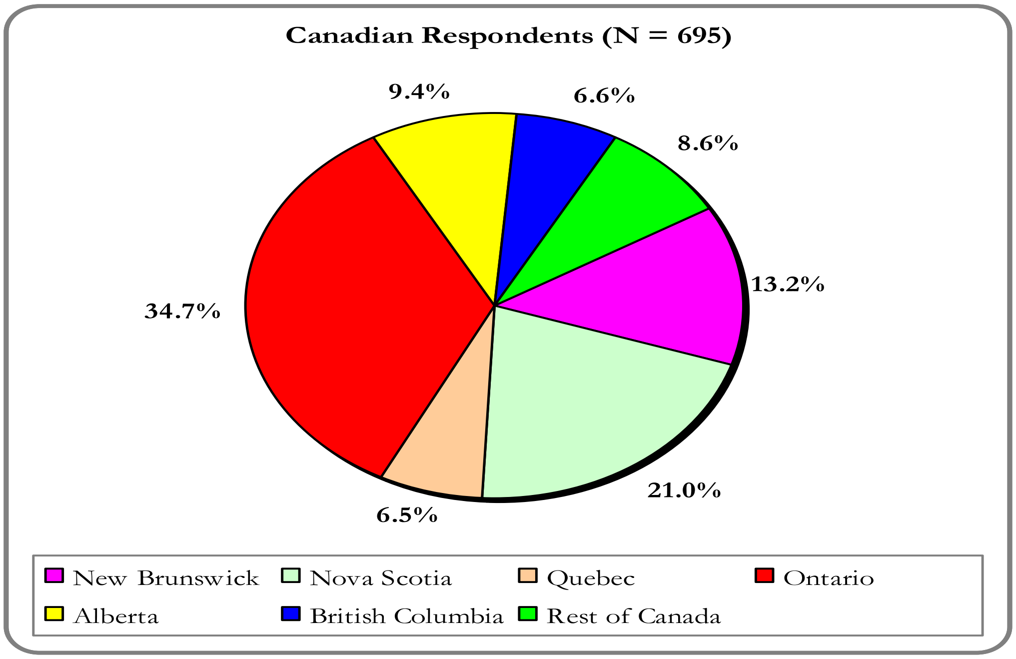
For this report, respondents were grouped into three categories of country of residence. Of the total respondents, 77.3 percent were from Canada (695 respondents), 17.8 percent were from the United States (160), and 4.9 percent were from other countries (44). The majority of participants were female (65.1 percent versus 34.9 percent male) but participants from other countries skewed more heavily toward males (56.8 percent versus 43.2 percent female). Over half of respondents (55.2 percent) were between 35 to 54 years of age with another 35.3 percent aged 55 or older. Most respondents (79.6 percent) reported being either married or living common-law.

It was most common for participants to be technical/community college graduates (25.7 percent). However, the majority of US respondents (68.7 percent) and half of respondents from other countries had completed an undergraduate program or had obtained a post-graduate/advanced degree or professional designation.

Over half (59.8 percent) of respondents were working full time. The second most common employment status was retired, representing 19.8 percent of respondents. The majority of respondents' income levels were less than $100,000, with 28.6 percent having an annual household income above $100,000. At the other end of the scale, 14.8 percent of respondents had an annual household income of less than $40,000. The largest single income threshold was $40,000 - $59,999 at 20.9 percent.

As shown in Figure 3.1, three provinces made up more than half of Canadian respondents: 34.7 percent were from Ontario, 21.0 percent from Nova Scotia, and 13.2 percent from New Brunswick.

Figure 3.1 Regional Distribution of Canadian Respondents



The regional distribution of US respondents (Figure 3.2) shows that 39.4 percent were from the North and South Central states. The South Atlantic (24.4 percent) and the rest of the US (18.8 percent) were the next largest segments.

Figure 3.2 Regional Distributions of U.S. Respondents

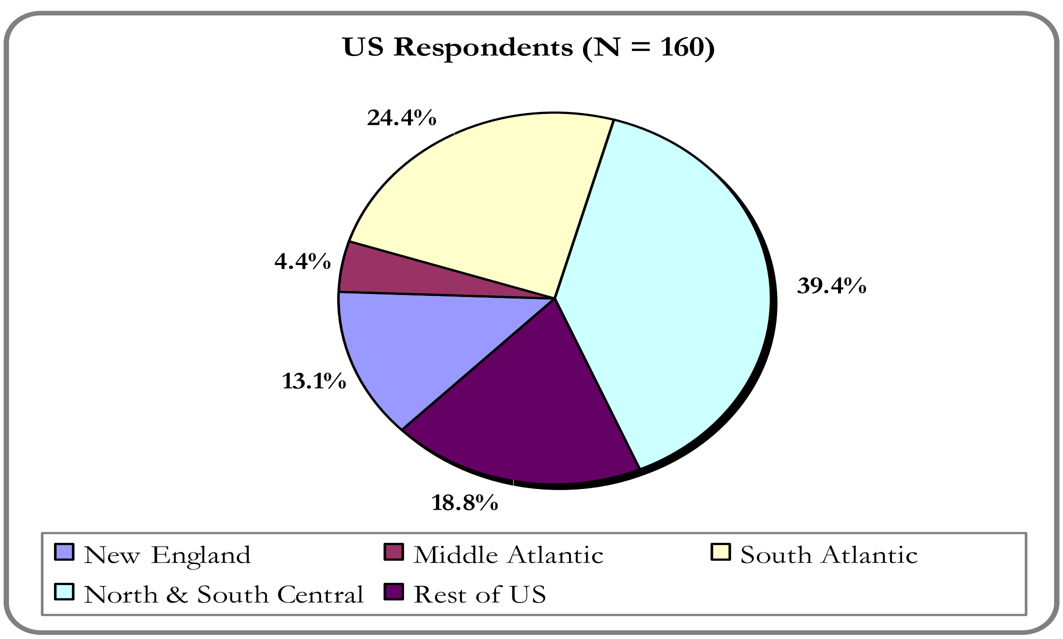


Table 3.1 Demographic Characteristics of Respondents

	Canada (*n*=695; 77.3%)		USA (*n*=160; 17.8%)		Other (*n*=44; 4.9%)		Total (*n*=899)	
Gender								
Male	226	32.5%	63	39.4%	25	56.8%	314	34.9%
Female	469	67.5%	97	60.6%	19	43.2%	585	65.1%
Age								
18 - 24	7	1.0%	1	0.6%	4	9.1%	12	1.3%
25 - 34	62	8.9%	6	3.8%	5	11.4%	73	8.1%
35 - 44	166	23.9%	22	13.8%	4	9.1%	192	21.4%
45 - 54	241	34.7%	48	30.0%	15	34.1%	304	33.8%
55 - 64	165	23.7%	49	30.6%	12	27.3%	226	25.1%
65 and over	54	7.8%	34	21.3%	4	9.1%	92	10.2%
Marital Status								
Married/Common-law	559	80.4%	127	79.4%	30	68.2%	716	79.6%
Single (Never married)	57	8.2%	14	8.8%	11	25.0%	82	9.1%
Widow	18	2.6%	0	0.0%	2	4.5%	20	2.2%
Divorced/Separated	57	8.2%	14	8.8%	1	2.3%	72	8.0%
Other	4	0.6%	5	3.1%	0	0.0%	9	1.0%
Education Level								
High school graduate or less	118	17.0%	11	6.9%	8	18.2%	137	15.2%
Some college-did not graduate/ Vocational/Technical school	136	19.6%	26	16.3%	3	6.8%	165	18.4%
Technical/Community College graduate	207	29.8%	13	8.1%	11	25.0%	231	25.7%
University graduate (Undergraduate)	137	19.7%	45	28.1%	12	27.3%	194	21.6%
Post-graduate/Advanced degree/Professional designation	97	14.0%	65	40.6%	10	22.7%	172	19.1%
Employment Status								
Working full time	424	61.0%	90	56.3%	24	54.5%	538	59.8%
Working part time or seasonally	68	9.8%	24	15.0%	7	15.9%	99	11.0%
Unemployed	10	1.4%	0	0.0%	2	4.5%	12	1.3%
Retraining or upgrading	8	1.2%	3	1.9%	0	0.0%	11	1.2%
Retired	131	18.8%	37	23.1%	10	22.7%	178	19.8%
Homemaker	54	7.8%	6	3.8%	1	2.3%	61	6.8%
Annual Household Income								
Under $40,000	107	15.4%	15	9.4%	11	25.0%	133	14.8%
$40,000 to $59,999	156	22.4%	28	17.5%	4	9.1%	188	20.9%
$60,000 to $79,999	141	20.3%	29	18.1%	8	18.2%	178	19.8%
$80,000 to $99,999	103	14.8%	31	19.4%	9	20.5%	143	15.9%
$100,000 to $124,999	89	12.8%	23	14.4%	5	11.4%	117	13.0%
$125,000 to $149,999	52	7.5%	10	6.3%	2	4.5%	64	7.1%
$150,000 or more	47	6.8%	24	15.0%	5	11.4%	76	8.5%

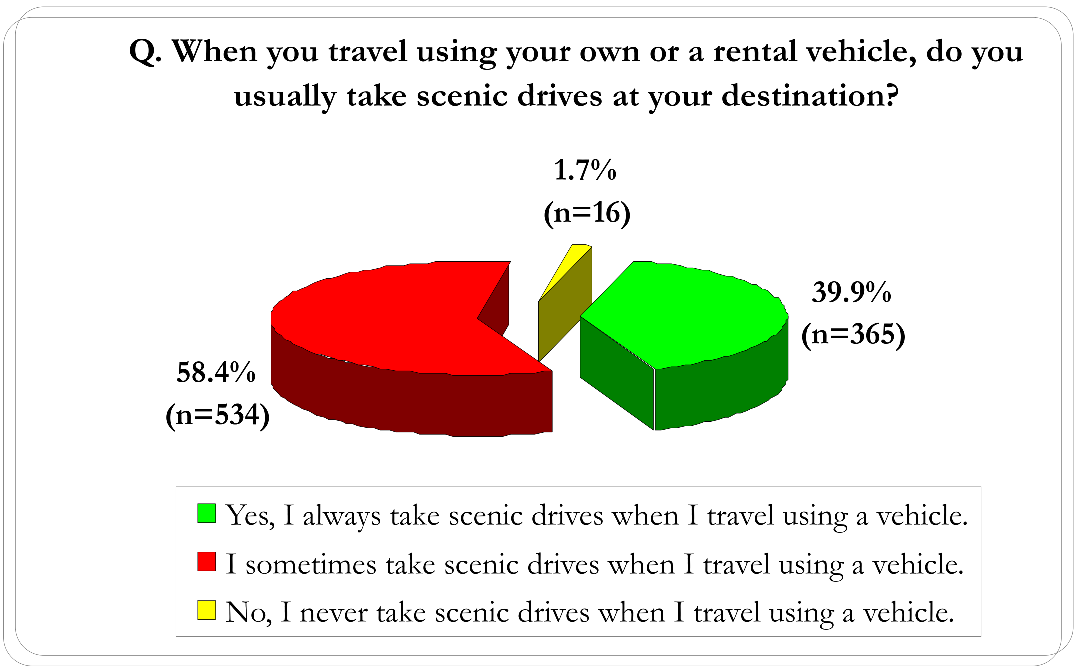
4. PROPENSITY FOR SCENIC DRIVE TOURISM

This section discusses information about scenic drive tourism in general (not specific to PEI). It includes information about travellers' propensity to take scenic drives, the influence of scenic drives on the decision to visit a destination, the propensity to research scenic drives available, and information sources used about them. Participants were asked to identify the scenic driving tours they have taken in the last 18 months, the length of time they prefer to stay on scenic drives, reasons for taking them, preferred types, and attitudes toward scenic drive tourism.

4.1 Propensity to Take Scenic Drives at Destinations

Scenic drives are popular among survey participants but it is most common for participants to "sometimes" take scenic drives (58.4 percent). Almost forty percent (39.9) of respondents divulged that they always take scenic drives when travelling in a vehicle. Only 1.7 percent of respondents claimed to never do so. Those 16 respondents were disqualified from the questionnaire and the remaining 899 participants continued to the next question.

Figure 4.1 Propensity to Take Scenic Drives at Destinations



As shown in Table 4.1, of the 899 participants who continued the survey, 40.6 percent always take scenic drives and 59.4 percent sometimes take scenic drives when travelling using a vehicle.

Table 4.1 Propensity to take Scenic Drives at Destinations, by Origin of Travellers

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Yes, I always take scenic drives when I travel using a vehicle.	271 (39.0%)	75 (46.9%)	19 (43.2%)	365 (40.6%)
I sometimes take scenic drives when I travel using a vehicle.	424 (61.0%)	85 (53.1%)	25 (56.8%)	534 (59.4%)

Note: Numbers in parentheses indicate % within column.

4.2 Propensity to take "Official" Drives at Destinations

Travellers are generally not discriminatory between official and unofficial scenic drives. As shown in Figure 4.2, the majority of respondents (80.8 percent) partake in both types of drives.

Only 5.6 percent of respondents claimed to drive only on official drives, while slightly more (13.7 percent) stated they only drive on unofficial drives.

Figure 4.2 Propensity for taking "Official" Drives or "Unofficial" Drives at Destinations

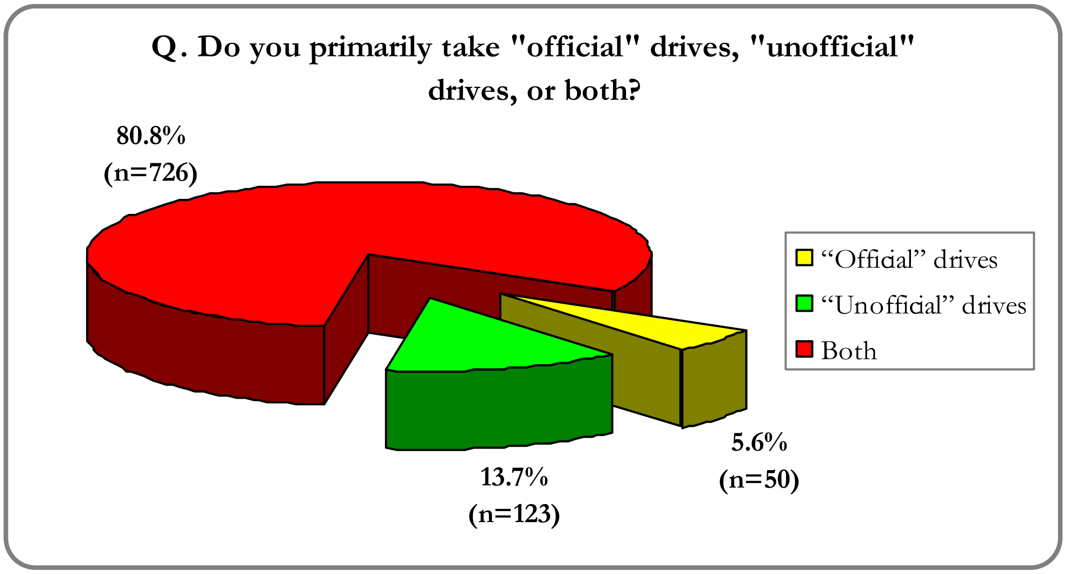


Table 4.2 Propensity for taking "Official" Drives, by Origin of Travellers

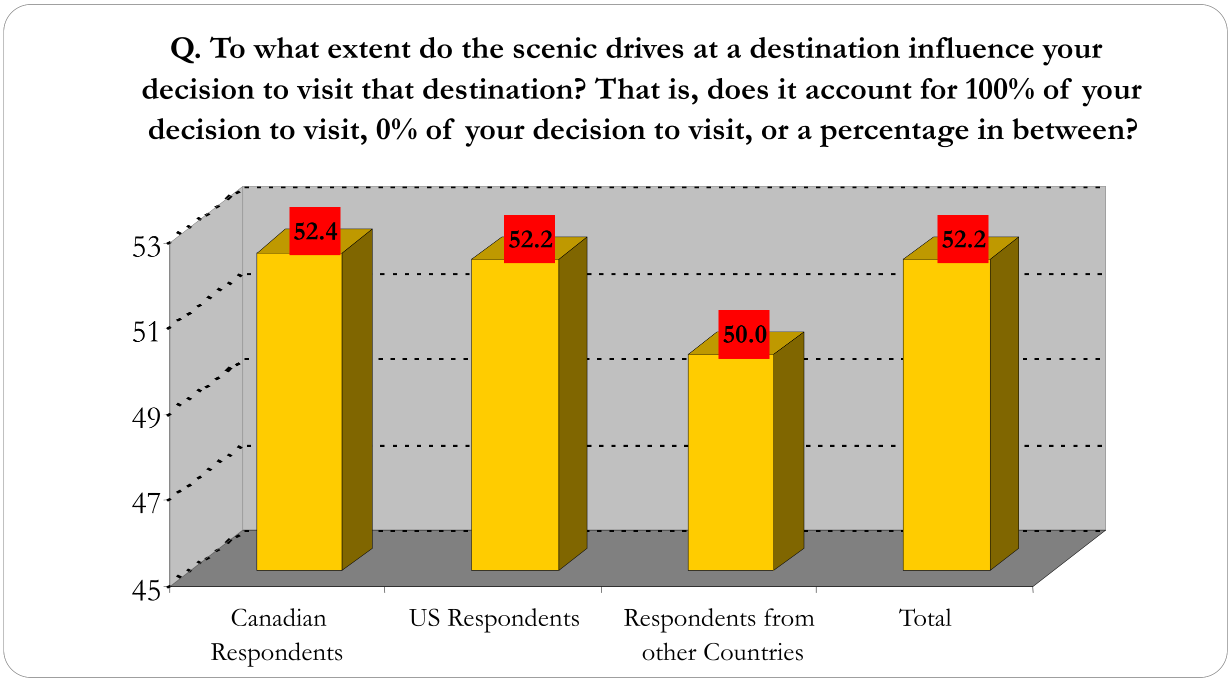
	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
"Official" drives	42 (6.0%)	5 (3.1%)	3 (6.8%)	50 (5.6%)
"Unofficial" drives	102 (14.7%)	19 (11.9%)	2 (4.5%)	123 (13.7%)
Both	551 (79.3%)	136 (85.0%)	39 (88.6%)	726 (80.8%)

Note: Numbers in parentheses indicate % within column.

4.3 Influence of Scenic Drives in Decision to Visit a Destination

As presented in Figure 4.3, scenic drives accounted for a surprisingly high percentage of the decision to visit a destination. Overall, scenic drives accounted for about 52 percent of the decision. This is consistent across the three participant categories. Scenic driving tours are a popular tourist product for this sample of travellers. It seems that it would be beneficial for destinations to aggressively promote and increase the level of awareness regarding the scenic drives that are available.

Figure 4.3 Influence of Scenic Drives in Decision to Visit a Destination



4.4 Propensity to Research Scenic Drives Available and Timing of the Decision

As shown in Table 4.3, 73.9 percent of participants research scenic drives available at the destination before travelling to the destination. Respondents from other countries (86.4 percent) were most likely to do this.

The most popular selection regarding timing of decision was "After I decide to travel to the destination" (43.5 percent), followed by "It is a reason for planning my trip to the destination" and "Once I arrive at the destination" (both 15.4 percent). The least popular choice was "I normally have no intention to take a scenic drive; I simply want to tour an area" (12.3 percent). Other than the most popular selection, the other options were rated quite closely.

Table 4.3 Propensity for Researching Scenic Drives Available and Timing of the Decision to take a Scenic Drive at Destination, by Origin of Travellers

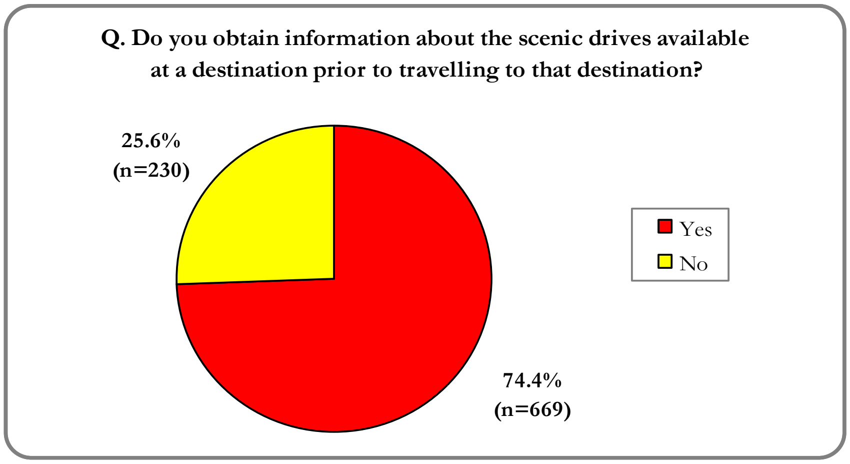
	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Propensity for Researching Scenic Drives Available				
Yes	507 (72.9%)	119 (74.4%)	38 (86.4%)	664 (73.9%)
No	188 (27.1%)	41 (25.6%)	6 (13.6%)	235 (26.1%)
Timing of Decision				
It is a reason for planning my trip to the destination.	103 (14.8%)	24 (15.0%)	11 (25.0%)	138 (15.4%)
After I decide to travel to the destination.	293 (42.2%)	75 (46.9%)	23 (52.3%)	391 (43.5%)
During the trip to the destination.	101 (14.5%)	15 (9.4%)	5 (11.4%)	121 (13.5%)
Once I arrive at the destination.	103 (14.8%)	32 (20.0%)	3 (6.8%)	138 (15.4%)
I normally have no intention to take a scenic drive; I simply want to tour an area.	95 (13.7%)	14 (8.8%)	2 (4.5%)	111 (12.3%)

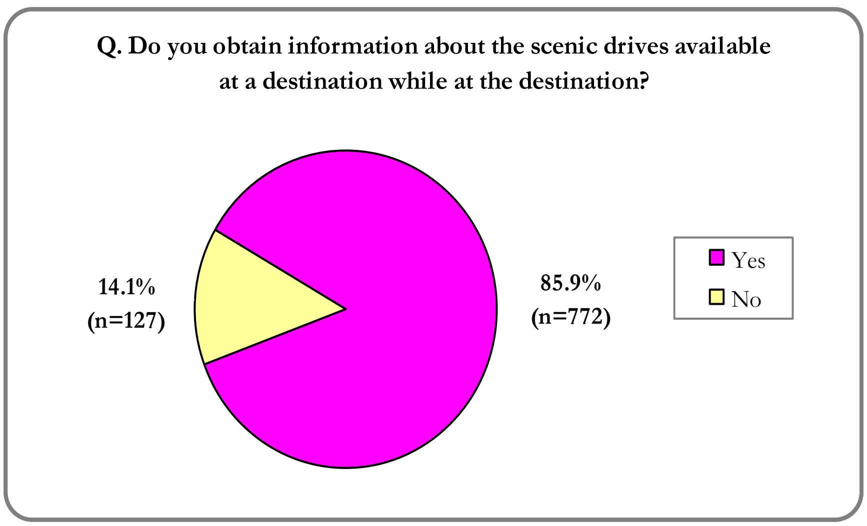
Note: Numbers in parentheses indicate % within column.

4.5 Information Sources Regarding Scenic Drives

As shown in Figure 4.4, more respondents tended to obtain information regarding the available scenic drives after arriving at the destination (85.9 percent) than prior to travelling (74.4 percent) but the percentages for both options is high.

Figure 4.4 Obtaining Information about the Scenic Drives





As shown in Table 4.4, the most popular personal information source was visitor information centres at the destination (preferred by 84.1 percent of respondents). The least popular personal information source was other travellers or hosts at the destination (48.0 percent). The overall average for the personal information sources was 66.8 percent.

For web-based information sources, the most popular selection was the destination's official tourism website (69.0 percent). The least popular source was Internet advertisements, e.g., banner ads (6.2 percent). The overall average across all web-based information sources was 38.3 percent.

For paper-based information sources, the most popular selection was official travel guides or brochures from state/provincial/national organizations with 80.0 percent of respondents selecting this source. The least popular source was advertisements in newspapers/magazines (19.5 percent). The overall average for the paper-based information sources was 46.3 percent.

For other information sources, the most popular selection was auto clubs, such as the AAA/CAA (43.3 percent). Auto clubs were much more popular with North American respondents. The least popular other information source was visits to trade or travel shows (10.7 percent). The overall average for the other information sources was 24.6 percent.

Across all categories, the most popular selections for information about scenic drives were visitor information centres at the destination (84.1 percent), official travel guide or brochures (80.0 percent), and the advice of friends or relatives/word-of-mouth (73.7 percent). The least popular choices were Internet advertisements (e.g., banner ads) (6.2 percent), visits to trade or travel shows (10.7 percent), and travel agent/agency (14.7 percent).

Table 4.4 Information Sources Used, by Origin of Travellers (Multiple Responses)

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Personal Information Sources				
Advice of friends or relatives/ word-of-mouth	478 (75.0%)	103 (68.2%)	30 (73.2%)	611 (73.7%)
Past experience/been there before	394 (61.9%)	95 (62.9%)	19 (46.3%)	508 (61.3%)
Other travellers or hosts at destination	297 (46.6%)	86 (57.0%)	15 (36.6%)	398 (48.0%)
Visitor Information Centre at destination	525 (82.4%)	139 (92.1%)	33 (80.5%)	697 (84.1%)
Web-based Information Sources				
Official website of scenic drive	313 (49.1%)	91 (60.3%)	29 (70.7%)	433 (52.2%)
The destination's official visitors website	421 (66.1%)	119 (78.8%)	32 (78.0%)	572 (69.0%)
Internet search engine (Google, Yahoo, MSN, etc.)	342 (53.7%)	92 (60.9%)	29 (70.7%)	463 (55.9%)
Websites of accommodation/ tourism operators at destination	237 (37.2%)	66 (43.7%)	15 (36.6%)	318 (38.4%)
Other general travel websites	162 (25.4%)	41 (27.2%)	10 (24.4%)	213 (25.7%)
Internet advertisements (e.g., banner ads)	42 (6.6%)	9 (6.0%)	0 (0.0%)	51 (6.2%)
Electronic newsletter or magazine received by e-mail	128 (20.1%)	34 (22.5%)	9 (22.0%)	171 (20.6%)
Paper-based Information Sources				
Official travel guides or brochures from state/provincial/national organizations	511 (80.2%)	123 (81.5%)	29 (70.7%)	663 (80.0%)
The official map of the destination	410 (64.4%)	98 (64.9%)	25 (61.0%)	533 (64.3%)
Articles in newspapers/magazines about destination	211 (33.1%)	75 (49.7%)	12 (29.3%)	298 (35.9%)
Advertisements in newspapers/magazines for destination	124 (19.5%)	34 (22.5%)	4 (9.8%)	162 (19.5%)
Travel guide books	397 (62.3%)	105 (69.5%)	32 (78.0%)	534 (64.4%)
Maps	373 (58.6%)	88 (58.3%)	25 (61.0%)	486 (58.6%)
Roadside kiosks	161 (25.3%)	35 (23.2%)	1 (2.4%)	197 (23.8%)
Brochures from Travel Agent/Agency	153 (24.0%)	28 (18.5%)	14 (34.1%)	195 (23.5%)
Other Information Sources				
Auto club such as the AAA/CAA	264 (41.4%)	89 (58.9%)	6 (14.6%)	359 (43.3%)
Travel Agent/Agency	95 (14.9%)	13 (8.6%)	14 (34.1%)	122 (14.7%)
Advertisements on television	172 (27.0%)	15 (9.9%)	3 (7.3%)	190 (22.9%)
Television programs about destination	193 (30.3%)	49 (32.5%)	21 (51.2%)	263 (31.7%)
Visits to trade or travel shows	74 (11.6%)	9 (6.0%)	6 (14.6%)	89 (10.7%)

4.6 Length of Time Stayed on the Drive

As shown below in Table 4.5, almost half (49.4 percent) of respondents prefer to take scenic drives that last about half a day (4 to 5 hours). This was the most popular selection within each respondent category. The least popular selection overall was four or more days.

While the percentages are different, the ranking from most popular to least popular response is almost the same for each of the three groups of respondents. For respondents from other countries, less than 3 hours and about a full day tied for second, and four or more days was preferred over one to three days.

Table 4.5 Length of Time Stayed on a Scenic Drive, by Origin of Travellers

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Less than 3 hours	179 (25.8%)	42 (26.3%)	9 (20.5%)	230 (25.6%)
About half a day (4 to 5 hours)	340 (48.9%)	84 (52.5%)	20 (45.5%)	444 (49.4%)
About a full day (8 to 10 hours)	96 (13.8%)	20 (12.5%)	9 (20.5%)	125 (13.9%)
One to three days	62 (8.9%)	12 (7.5%)	2 (4.5%)	76 (8.5%)
Four or more days	18 (2.6%)	2 (1.3%)	4 (9.1%)	24 (2.7%)

Note: Numbers in parentheses indicate % within column.

4.7 Reasons for Taking Scenic Drives at Destinations

Overall, the most popular reason for taking a scenic drive was "To observe the scenery" (85.8 percent), followed by "Best way to see note-worthy attractions" (65.9 percent), and "I enjoyed similar types of drives in the past" (52.7 percent).

The least popular choices were "Taking the drive means I avoid getting lost in an unfamiliar area" (3.9 percent), "Other" (8.6 percent), and "It's a good way to get from Point A to Point B" (23.4 percent).

Canadian and US respondents agreed with the overall rankings of the three most popular and three least popular selections. Respondents from other countries shared these three lowest selected responses, but responses were tied for the most popular ("Best way to see noteworthy attractions" and "To observe the scenery" both at 72.7 percent) and the second most popular ("It is a way to walk through history" and "Guidebook recommendation" both at 43.2 percent).

Recommendation of friends/family/others was ranked quite differently based on origin; it was selected by 43.0 percent of Canadians, 29.4 percent of Americans, and only 18.2 percent of respondents from other countries.

Table 4.6 Reasons for Taking Scenic Drives at Destinations, by Origin of Travellers *

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Best way to see noteworthy attractions	467 (67.2%)	93 (58.1%)	32 (72.7%)	592 (65.9%)
It is something I always do when visiting a destination	231 (33.2%)	58 (36.3%)	10 (22.7%)	299 (33.3%)
It is a good way to get from Point A to Point B	164 (23.6%)	38 (23.8%)	8 (18.2%)	210 (23.4%)
Past experience, I enjoyed the drive before	275 (39.6%)	69 (43.1%)	10 (22.7%)	354 (39.4%)
To observe the scenery	599 (86.2%)	140 (87.5%)	32 (72.7%)	771 (85.8%)
Taking the drive means I avoid getting lost in an unfamiliar area	24 (3.5%)	8 (5.0%)	3 (6.8%)	35 (3.9%)
Recommendation of friends/family/others	299 (43.0%)	47 (29.4%)	8 (18.2%)	354 (39.4%)
I enjoyed similar types of drives in the past	371 (53.4%)	88 (55.0%)	15 (34.1%)	474 (52.7%)
It is a way to "walk through history"	294 (42.3%)	70 (43.8%)	19 (43.2%)	383 (42.6%)
Reputation of the drive	187 (26.9%)	55 (34.4%)	12 (27.3%)	254 (28.3%)
Guidebook recommendation	256 (36.8%)	74 (46.3%)	19 (43.2%)	349 (38.8%)
Other	60 (8.6%)	15 (9.4%)	2 (4.5%)	77 (8.6%)

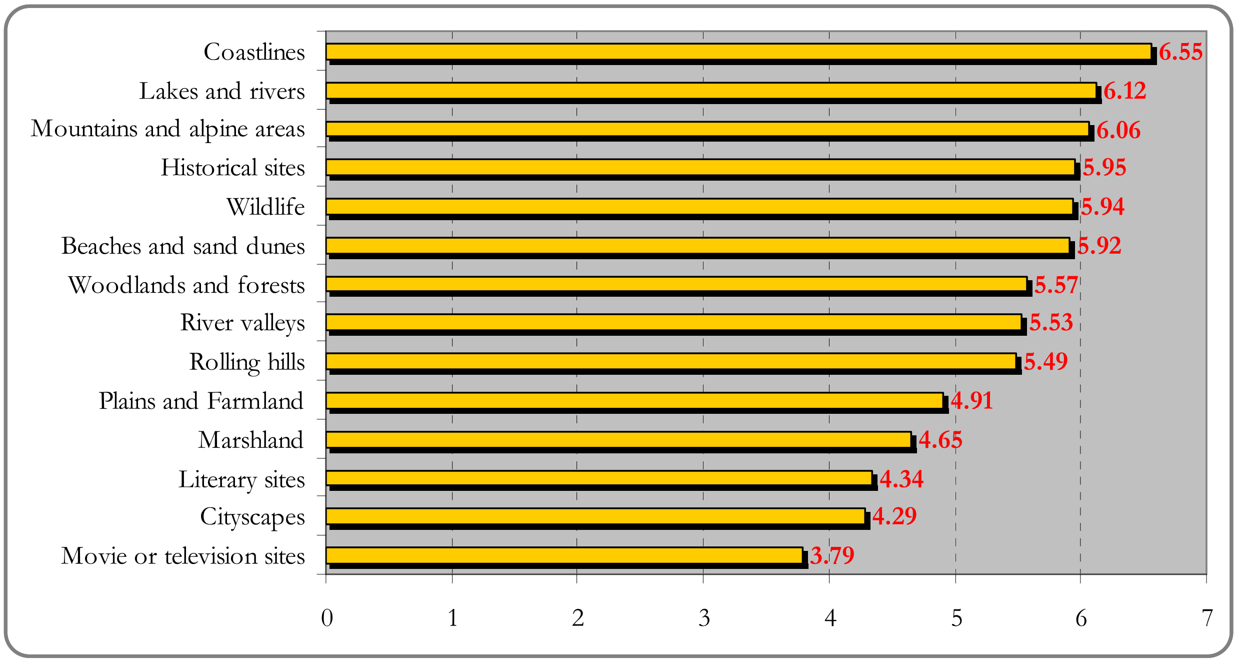
Note: * Multiple responses; Numbers in parentheses indicate % within column.

4.8 Preferred Types of Scenic Drives

Using a ranking scale of one to seven, respondents ranked their preferred types of scenic drives as coastlines (6.55), lakes and rivers (6.12), and mountains and alpine areas (6.06).

The least preferred types of drives were movie or television sets (3.79), cityscapes (4.29), and literary sites (4.34). Respondents from other countries were marginally more interested in literary sites (4.79) preferring them over marshlands (4.68). They were notably less interested in beaches and sand dunes (5.12 versus 5.98 for Canadians and 5.87 for Americans).

Figure 4.5 Preferred Types of Scenic Drives



Note: Mean values are based on a 7-Point scale (1 = not at all interested to 7 = very interested).

Table 4.7 Preferred Types of Scenic Drives, by Origin of Travellers

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Beaches and sand dunes	5.98	5.87	5.14	5.92
Coastlines	6.58	6.55	6.16	6.55
Woodlands and forests	5.47	5.91	5.84	5.57
Mountains and alpine areas	6.03	6.18	6.16	6.06
Lakes and rivers	6.11	6.14	6.28	6.12
Rolling hills	5.50	5.52	5.35	5.49
Plains and farmland	4.88	4.96	5.11	4.91
Wildlife	5.97	5.91	5.69	5.94
Historical sites	5.94	5.96	6.09	5.95
Marshland	4.63	4.74	4.68	4.65
River valleys	5.52	5.51	5.75	5.53
Cityscapes	4.31	4.09	4.68	4.29
Literary sites	4.26	4.58	4.79	4.34
Movie or television sites	3.85	3.43	4.14	3.79

Note: Mean values are based on a 7-Point Likert scale (1 = not at all interested to 7 = very interested).

4.9 Attitudes Toward Scenic Drive Tourism

The most agreed with statements were "On the scenic drives I take, I usually find that taking the drive was a good way to spend some of my time while visiting the destination" (6.01), "On the scenic drives I take, I usually find that having information about the drive with me increases the enjoyment of the drive" (5.96), and "I would recommend that others take the scenic drives I take when visiting a destination" (5.92).

The least agreed with statements were "I like to take scenic drives where there is enough to see and do to spread the drive over multiple days" (4.44), "On the scenic drives I take, I normally create a travel itinerary based on the driving route and available amenities" (4.50), and "On the scenic drives I take, I usually find that it is better to stay overnight in the area than to do the whole drive in one day" (4.55).

US respondents were generally more generous with ratings; they had the highest agreement levels on 9 of 13 statements. However, they did give the lowest ratings to two statements.

Respondents from other countries were the most likely to give the lowest ratings; they had the lowest agreement level on 7 of 13 statements, one of which was a tie with Canadian respondents. Regardless, they did give the highest score to four statements.

Table 4.8 Attitudes Toward Scenic Drive Tourism, by Origin of Travellers

	Canadian Res. (N=695; 77.3%)	U.S. Res. (N=160; 17.8%)	Other Res. (N=44; 4.9%)	Total (N=899)
On the scenic drives I take, I normally create a travel itinerary based on the driving route and available amenities.	4.38	4.98	4.81	4.50
I take a scenic drive at a destination as it is something to do while visiting the area.	5.70	5.85	5.33	5.71
I usually find that the scenic drives I take are an excellent reason to visit the destination.	5.42	5.60	5.42	5.45
On the scenic drives I take, I usually find that there is sufficient directional signage.	5.28	5.46	5.05	5.30
On the scenic drives I take, I usually find that taking the drive was a good way to spend some of my time while visiting the destination.	6.00	6.12	5.71	6.01
On the scenic drives I take, I usually find that having information about the drive with me increases the enjoyment of the drive.	5.93	6.11	5.90	5.96
I would recommend that others take the scenic drives I take when visiting a destination.	5.92	5.90	5.93	5.92
On the scenic drives I take, I usually find that roads, paths, etc., are clear of garbage and debris.	5.45	5.63	5.19	5.47
I like to take scenic drives where there is enough to see and do to spread the drive over multiple days.	4.40	4.48	4.89	4.44
On the scenic drives I take, I usually find that it is better to stay overnight in the area than to do the whole drive in one day.	4.53	4.48	5.02	4.55
On the scenic drives I take, I usually find that there are enough pull-offs on the drive to rest, picnic, take photos, etc.	5.34	5.54	5.29	5.37
On the scenic drives I take, I usually find that there is sufficient information available while on the drive.	5.12	5.39	5.07	5.16
I like to take scenic drives that include numbered attractions to stop at along the route.	5.04	5.10	5.12	5.05

Note: Mean values are based on a 7-Point Likert scale (1 = completely disagree to 7 = completely agree).

4.10 Scenic Driving Tour Taken in the Last 18 Months

Overall, 92.7 percent of respondents have taken a scenic drive on a leisure/pleasure trip in the past 18 months (Figure 4.6). The results varied among country of origin: 93.1 percent of Canadians and Americans responded yes, while 84.1 percent of respondents from other countries responded yes (Table. 4.9).

Figure 4.6 Scenic Driving Tour Taken in the Last 18 Months

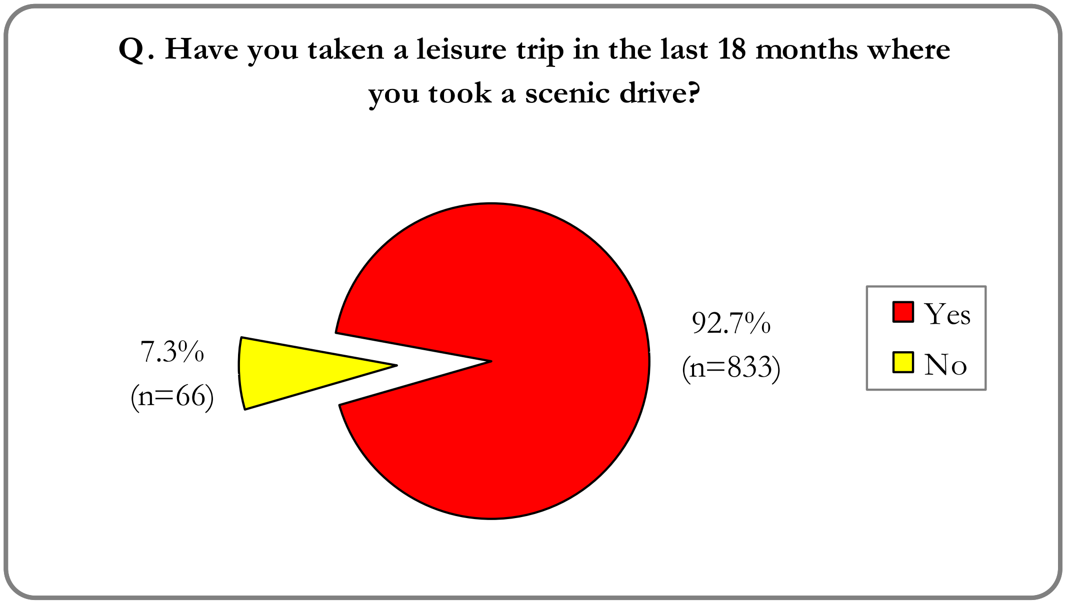


Table 4.9 Scenic Driving Tour Taken in the Last 18 Months, by Origin of Travellers

	Canadian Respondents (N=695; 77.3%)	U.S. Respondents (N=160; 17.8%)	Respondents from other Countries (N=44; 4.9%)	Total (N=899)
Yes	647 (93.1%)	149 (93.1%)	37 (84.1%)	833 (92.7%)
No	48 (6.9%)	11 (6.9%)	7 (15.9%)	66 (7.3%)

Note: Numbers in parentheses indicate % within column.

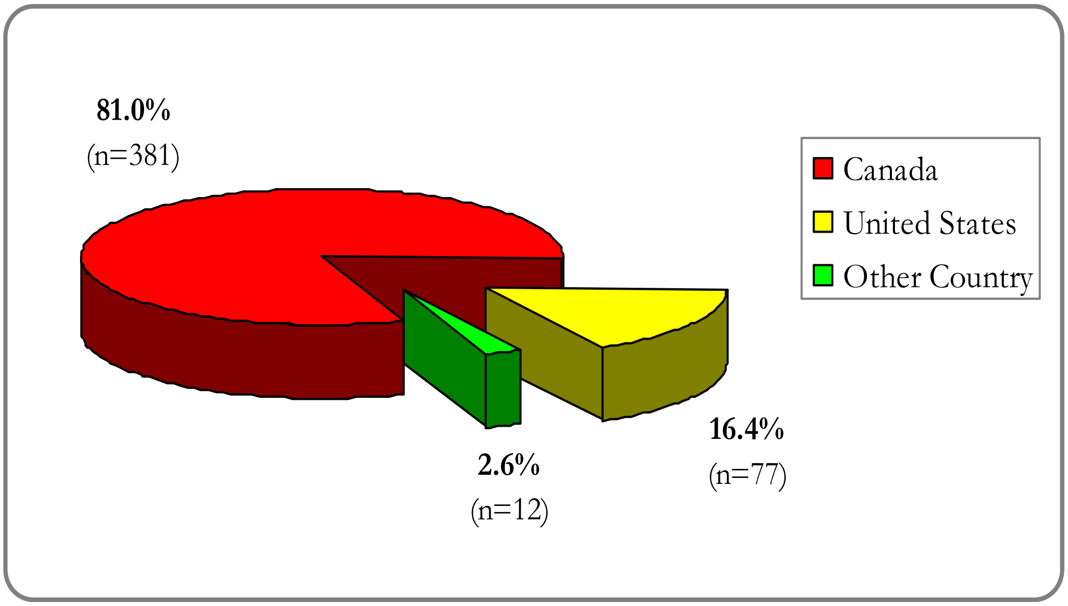
5. PEI VISITORS WHO TOOK SCENIC DRIVES

This section focuses on the travellers who visited PEI and the scenic drives they took. It provides information about the travellers and their trips, including country of origin, scenic drives taken, regions visited, trip duration, travel party size, month of visitation, activities participated in, and perceptions and behavioural intentions.

5.1 Origin of Travellers Who Visited PEI

As shown in Figure 5.1, of the 470 respondents who had visited PEI within the past 18 months and had taken a scenic drive, 81.0 percent were from Canada. US respondents accounted for 16.4 percent, and respondents from other countries made up the remaining 2.6 percent.

Figure 5.1 Origin of Travellers Who Visited PEI (Total N = 470)



5.2 PEI Scenic Drives Taken and Regions Travelled

As shown in Table 5.1, 35.5 percent of respondents did not travel on an official drive, and another 2.3 percent did not know what scenic drive they took.

The most popular official drive to take in PEI was the North Cape Coastal Drive (50.9 percent), though only marginally.

Among those who did not identify travelling on an official scenic drive, North-Central PEI was the most popular region travelled. Western and Eastern PEI were the least popular.

Table 5.1 PEI Scenic Drives Taken and Regions Travelled by Origin of Travellers *

	Canadian Respondents (N=381; 81.0%)	U.S. Respondents (N=77; 16.4%)	Respondents from other Countries (N=12; 2.6%)	Total (N=470)
Scenic Drives Taken				
North Cape Coastal Drive	186 (48.8%)	46 (59.7%)	7 (58.3%)	239 (50.9%)
Blue Heron Drive	186 (48.8%)	37 (48.1%)	8 (66.7%)	231 (49.1%)
Points East Coastal Drive	175 (45.9%)	41 (53.2%)	5 (41.7%)	221 (47.0%)
I did not take an official scenic drive, I simply toured around	134 (35.2%)	28 (36.4%)	5 (41.7%)	167 (35.5%)
Don't know	10 (2.6%)	1 (1.3%)	0 (0.0%)	11 (2.3%)
Regions Travelled				
Western PEI	65 (45.1%)	14 (48.3%)	2 (40.0%)	81 (45.5%)
North-Central PEI	115 (79.9%)	22 (75.9%)	4 (80.0%)	141 (79.2%)
South-Central PEI	101 (70.1%)	22 (75.9%)	5 (100.0%)	128 (71.9%)
Eastern PEI	64 (44.4%)	18 (62.1%)	3 (60.0%)	85 (47.8%)

Note: * Multiple responses; Numbers in parentheses indicate % within column.

5.3 Trip Duration and Travel Party Size

Respondents from other countries tended to travel in smaller parties (2.33 people), and take the longest trips (18.42 nights), but spent the least amount of time in PEI (5.25 nights).

American respondents took slightly longer trips than Canadian respondents (12.40 nights versus 11.80 nights) and they spent more time in PEI (6.55 nights versus 5.70 nights). However, their average party size was much smaller (2.57 people versus 3.23 people).

Table 5.2 Trip Duration and Travel Party Size, by Origin of Travellers

	Canadian Respondents (N=381; 81.0%)	U.S. Respondents (N=77; 16.4%)	Respondents from other Countries (N=12; 2.6%)	Total (N=470)
Total Nights for the Trip	11.80	12.40	18.42	12.07
Nights stayed in PEI	5.70	6.55	5.25	5.83
Number in Travel Party	3.23	2.57	2.33	3.10

5.4 Month of Visitation

Overall, August was the most popular month to visit PEI (36.2 percent). June was the most popular month for respondents from other countries. Not surprisingly, November was the least popular month to visit.

The post-summer shoulder season (September and October) was more popular (24.4 percent) than the pre-summer shoulder season (May and June) (12.3 percent).

Table 5.3 Month of Visitation by Origin of Travellers

	Canadian Respondents (N=381; 81.0%)	U.S. Respondents (N=77; 16.4%)	Respondents from other Countries (N=12; 2.6%)	Total (N=470)
May	7 (1.8%)	3 (3.9%)	0 (0.0%)	10 (2.1%)
June	39 (10.2%)	4 (5.2%)	5 (41.7%)	48 (10.2%)
July	100 (26.2%)	23 (29.9%)	0 (0.0%)	123 (26.2%)
August	139 (36.5%)	28 (36.4%)	3 (25.0%)	170 (36.2%)
September	76 (19.9%)	11 (14.3%)	3 (25.0%)	90 (19.1%)
October	16 (4.2%)	8 (10.4%)	1 (8.3%)	25 (5.3%)
November	4 (1.0%)	0 (0.0%)	0 (0.0%)	4 (0.9%)

Note: Numbers in parentheses indicate % within column.

5.5 Travel Activities Participated in

Overall, the most popular activities, excluding sightseeing/driving tours (77.0 percent), were shopping for local crafts/souvenirs/antiques (73.8 percent), going to a beach (70.2 percent), and visiting historical and cultural attractions (65.1 percent). These were also the most popular activities for Canadian respondents, but with slightly different percentages (73.0 percent, 71.1 percent, and 60.9 percent).

The participation rates of respondents from the US and other countries were somewhat different. Excluding sightseeing/driving tours (83.1 percent), the most popular activities for US respondents were visiting historical and cultural attractions (83.1 percent), shopping for local crafts/souvenirs/antiques (75.3 percent), and visiting a national or provincial park (72.7 percent). Respondents from other countries chose shopping for local crafts/souvenirs/antiques (91.7 percent), visiting historical and cultural attractions (83.3 percent) and visiting Anne of Green Gables attractions (75.0 percent – the same as sightseeing/driving tour).

Overall, the least popular activities were attending a sporting event/tournament as a spectator (3.2 percent), playing golf (11.5 percent), and participating in other sports and/or outdoor activities (11.7 percent).

There were four activities in which no respondents from other countries participated: playing golf, participating in sports and/or outdoor activities, attending a festival, fair or event, and visiting a theme, fun, or amusement park. The activities least favoured by US respondents were attending a sporting event/tournament and playing golf (both 3.9 percent), and visiting a theme, fun, or amusement park (11.7 percent). Canadian respondents were least likely to attend a sporting event/tournament (3.1 percent), participate in other sports and/or outdoor activities (10.8 percent), and play golf (13.4 percent).

Other respondents were much more likely to visit Anne of Green Gables attractions and somewhat more likely to attend a performance, shop for local crafts/souvenirs/antiques, and go to a lobster dinner. They were not as likely to visit friends or relatives, go to a beach, or go to a bar/pub/lounge/nightclub. US respondents were the most likely to go on a sightseeing/driving tour, visit a national or provincial park, and attend a festival, fair or event. Canadian respondents were the most likely to: visit a beach, go to a bar/pub/lounge/nightclub, visit a theme, fun or amusement park, play golf, and visit friends and/or relatives.

Table 5.4 Travel Activities Participated in, by Origin of Travellers *

	Canadian Respondents (N=381; 81.0%)	U.S. Respondents (N=77; 16.4%)	Respondents from other Countries (N=12; 2.6%)	Total (N=470)
Visiting friends and/or relatives	142 (37.3%)	17 (22.1%)	1 (8.3%)	160 (34.0%)
Sightseeing/driving tour	289 (75.9%)	64 (83.1%)	9 (75.0%)	362 (77.0%)
Visiting historical and cultural attractions	232 (60.9%)	64 (83.1%)	10 (83.3%)	306 (65.1%)
Visiting Canada's birthplace attractions/ Founders' Hall	99 (26.0%)	29 (37.7%)	5 (41.7%)	133 (28.3%)
Visiting Anne of Green Gables attractions	160 (42.0%)	43 (55.8%)	9 (75.0%)	212 (45.1%)
Visiting a national or provincial park	228 (59.8%)	56 (72.7%)	6 (50.0%)	290 (61.7%)
Visiting a theme, fun or amusement park	94 (24.7%)	9 (11.7%)	0 (0.0%)	103 (21.9%)
Attending a festival, fair or event	90 (23.6%)	21 (27.3%)	0 (0.0%)	111 (23.6%)
Attending a performance (live theatre, a play, a concert)	103 (27.0%)	28 (36.4%)	5 (41.7%)	136 (28.9%)
Attending a sports event or tournament (as a spectator)	12 (3.1%)	3 (3.9%)	0 (0.0%)	15 (3.2%)
Going to a beach	271 (71.1%)	53 (68.8%)	6 (50.0%)	330 (70.2%)
Shopping for local crafts/souvenirs/antiques	278 (73.0%)	58 (75.3%)	11 (91.7%)	347 (73.8%)
Going to a lobster dinner (meal)	187 (49.1%)	36 (46.8%)	7 (58.3%)	230 (48.9%)
Going to a bar/pub/lounge/nightclub	103 (27.0%)	19 (24.7%)	2 (16.7%)	124 (26.4%)
Playing golf (not miniature)	51 (13.4%)	3 (3.9%)	0 (0.0%)	54 (11.5%)
Participating in other sports and/or outdoor activities	41 (10.8%)	12 (15.6%)	2 (16.7%)	55 (11.7%)

Note: * Multiple responses; Numbers in parentheses indicate % within column.

5.6 Perceptions of the Scenic Drives in PEI and Behavioural Intentions

Respondents' perceptions of the scenic drives in PEI were positive overall, with none of the total ratings below 5.63, out of a possible 7.00. However, respondents from other countries did rate one statement below five (4.83): "The scenic drives on PEI are unique among the driving tours I have taken." US and Canadian respondents scored this statement much higher (5.84 and 5.63, respectively).

The statement that all respondents were most agreeable with was "I would recommend that others take the scenic drives on PEI," followed by "Taking scenic drives on PEI was a good way to spend some of my time while on PEI."

Overall, the respondents were happy with the signage on the scenic drives in PEI (score of 6.03). Although travellers prefer to take shorter drives (see section 4.6), they tended to agree that "There was enough to see and do to spread the scenic drives on PEI over multiple days."

The only statement/question for which respondents from other countries gave a higher rating than Canadian and American respondents was, "If you return to PEI in the future, how likely would you go on one of the 'official' scenic drives?" Other respondents gave a rating of 6.50, well above the overall average of 5.63.

Table 5.5 Perceptions of the Scenic Drives in PEI and Behavioural Intentions, by Origin of Travellers

	Canadian Respondents (N=381; 81.0%)	U.S. Respondents (N=77; 16.4%)	Respondents from other Countries (N=12; 2.6%)	Total (N=470)
The scenic drives on PEI are unique among the driving tours I have taken.	5.63	5.84	4.83	5.64
The scenic drives on PEI are an excellent reason to visit PEI.	6.18	6.31	5.58	6.19
There is sufficient signage on the scenic drives on PEI.	6.01	6.25	5.25	6.03
Taking scenic drives on PEI was a good way to spend some of my time while on PEI.	6.41	6.45	6.33	6.41
There was enough to see and do to spread the scenic drives on PEI over multiple days.	6.06	6.08	5.83	6.06
I would recommend that others take the scenic drives on PEI.	6.46	6.51	6.33	6.47
If you return to PEI in the future, how likely would you go on one of the "official" scenic drives?	5.62	5.52	6.50	5.63

Note: Mean values are based on a 7-Point Likert scale (1 = completely disagree to 7 = completely agree); Mean values are based on a 7-Point scale (1 = very unlikely to 7 = very likely)