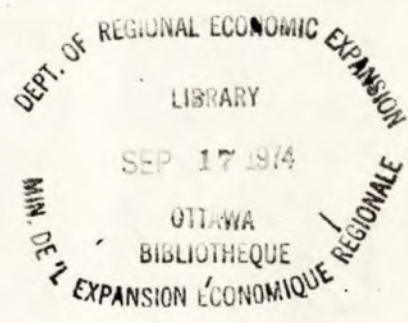


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SUMMARY OF SIGNIFICANT DEMAND AND SUPPLY RELATIONSHIPS
RELATIVE TO TOURIST DEVELOPMENT IN THE MARITIME PROVINCES



Prepared For
Department of Regional Economic Expansion
Ottawa, Canada

"THE VIEWS EXPRESSED IN THIS REPORT ARE NOT NECESSARILY THOSE OF DREE"
"LES OPINIONS EXPRIMEES DANS CE RAPPORT NE SONT PAS NECESSAIREMENT CELLES DU MEER"

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PREAMBLE

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SELECTED MEASURES OF DEMAND, SUPPLY AND ECONOMIC IMPACT

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1. INTRODUCTION

The salient features of the demand study are summarized on the basis of five selected topics. Included in the group are party volume visitation, seasonality and market area strength - trip purpose, activity participation, expectation and realization - intensity and focus of visitation, and holding and destination area strength by tourist districts - accommodation usage - measures of economic significance including total traveller expenditures, together with household income and employment impact.

Some tables included in the aforementioned topics can be found in the demand study. Others have been specially prepared for this summary section. The discussion of salient features and impressions and conclusions is somewhat more generalized than that found in the main demand study. Moreover, the introduction of new tables and the somewhat broader perspective adopted have brought forth additional statements of significance in policy and program formulation by the Department of Regional Economic Expansion.

The summary of supply factors is focused essentially upon accommodation. The main report dealing with supply is basically of summary nature making further discussion highly repetitious.

II. MEASURES OF PARTY VOLUME VISITATION, SEASONALITY AND MARKET AREA STRENGTH

1. Introduction

In Table S-1, party visitation for all purposes of travel during the Entire Season is summarized in terms of extra-regional visitation and resident travel on day, overnight and extended trips. Here, information derived from several source documents and all three major sections of the Demand Study is recapitulated.

The seasonal distribution of day, overnight and extended trips was summarized in Table S-2 solely on the basis of information obtained from the Exit Survey of the Maritime Provinces of 1971.

Origin area patterns revealed in the Exit Survey of 1971 are summarized in Tables S-3 and S-4. The former provides a detailed description of volume totals and significant percentage distributions by provincial, state and regional areas. The latter contains an interesting ranking of the major origin areas on the basis of information shown in Table S-3.

The Entire Season of 1971 covers the period May 15th to October 31st. The Main Season includes the time span from June 15th to September 15th. The Extended Season includes the time periods May 15th to June 14th and September 16th to October 31st. In effect, both the spring and fall shoulder seasons are encompassed in the Extended Season.

2. Party Trips to and Within the Maritime Provinces in the Entire Season 1971 - Table S-1

(a) Technical Comment

The day trips involve no overnight stay in a province,

Table S-1

PARTY TRIPS TO AND WITHIN THE MARITIME PROVINCES DURING THE ENTIRE SEASON (MAY 15 to OCT. 31) 1971 - ALL PURPOSES OF TRAVEL INCLUDED

	NOVA SCOTIA						NEW BRUNSWICK						PRINCE EDWARD ISLAND						MARITIME PROVINCES ^{10/}									
	Day ^{1/}		Overnight ^{2/}		Extended ^{3/}		Day ^{1/}		Overnight ^{2/}		Extended ^{3/}		Day ^{1/}		Overnight ^{2/}		Extended ^{3/}		Total	Total ^{12/}								
	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%						
I. Associated With Extra-Regional Visitation from ^{4/}																												
1. Overseas Countries ^{7/}	-		-		3.0	1	3.0					2.4	1	2.4					.4	.4	5.8	.2						
2. United States ^{8/}	12.3	1	60.2	13	64.1	34	136.6	8	421.7	30	212.8	34	41.5	25	676.0	30	4.9	4	29.0	23	10.6	19	44.5	13	593.3	17.4	593.3	59.8
3. Canada ^{8/}	18.1	2	56.7	12	71.4	34	146.2	9	157.0	11	174.9	28	79.4	47	411.3	19	3.4	2	29.8	23	22.8	42	56.0	17	353.6	10.4	353.6	35.6
Total I	30.4	3	116.9	25	138.5	65	285.8	17	578.7	41	387.7	62	123.3	73	1,089.7	49	8.3	6	58.8	46	33.8	62	100.9	30	952.7 ^{10/}	28.0	946.9	95.4
II. Associated with Resident Travel ^{5/}																												
1. Between Maritime Prov. ^{8/}	68.9	7	38.6	8	20.3	10	127.8	7	125.6	9	53.5	9	17.6	11	196.7	9	6.3	4	21.5	17	12.8	23	40.6	12	45.3 ^{11/}	11.4	45.3 ^{11/}	4.6
2. Within own Prov. ^{9/}	915.0	90	317.1	67	53.7	25	1,285.8	76	712.3	50	183.9	29	27.2	16	923.4	42	134.7	90	48.1	37	8.0	15	190.8	58	2,400.0	70.6		
Total II	983.9	97	355.7	75	74.0	35	1,413.6	83	837.9	59	237.4	38	44.8	27	1,120.1	51	141.0	94	69.6	54	20.8	38	231.4	70	2,445.3	92.0		
GRAND TOTAL	1,014.3	100	472.6	100	212.5	100	1,699.4	100	1,416.6	100	625.1	100	168.1	100	2,209.8	100	149.3	100	128.4	100	54.6	100	332.3	100	3,398.0	100.0	992.2	100.0
III. Commuters ^{6/}																												
							20.3							108.5							.5							
							1,719.7							2,318.3							332.8							

^{1/} Day trips by non-residents of the Maritime Provinces involved no overnight stays within provincial boundaries. Many parties included in this trip type in a province were involved in overnight or extended trips in other provinces. Day trips by residents of a province to destinations within its boundaries involved a return home the same day.

^{2/} Overnight trips by non-residents of a province involved a stay of one to three nights in a province. Some parties included in this trip type were on day or extended trips to other provinces. Overnight trips by residents of a maritime province to destinations within its boundaries included one to three nights away from home.

^{3/} An Extended Trip involved more than three nights' stay in a province.

^{4/} Includes parties residing outside the Maritime Provinces.

^{5/} Includes travel by residents of the Maritime Provinces.

^{6/} Includes all inter-provincial commuting parties shown in Tables C-9, C-10 & C-11, except those from foreign countries or unknown points that were presumed to be included in parties from Overseas Countries (I, 1).

^{7/} Based on data presented in Table A-4. It was assumed that 70% of the person-arrivals came within the Entire Season. Person-arrivals were converted to parties, assuming an average party size of 1.25 person. All were considered to be on Extended Trips.

^{8/} Data from Tables C-9, C-10 & C-11, based entirely on Exit Survey of 1971. Only automobile traffic included.

^{9/} Based on Table C-52. It was assumed from an examination of data contained in the source documents on which Table C-52 was based, that 85% of the trips took place in the Entire Season. Includes all modes of transport, but over 95% of the trips probably were by automobile.

^{10/} Represents individual party travel to and within the Maritime Provinces as a Region. Data for extra-regional parties from Table C-21.

^{11/} In this case, the total represents individual parties exiting the region, whereas in all columns to the left values are for travel between provinces.

^{12/} Includes only data from 1971 Exit Survey for the Maritime Provinces.

overnight trips a stop of one to three nights, and extended trips a stay of over three nights. In the case of resident travel to destinations within provincial boundaries, trip-length categories are designated in terms of nights away from home. In the case of extra-regional visitation and resident travel between provinces, a party involved in a trip-length category of a particular type in one province may have been involved in one of another type in other provinces. For example, an American party recording no overnight stop in New Brunswick may have experienced overnight or extended stays in Nova Scotia and Prince Edward Island.

Party totals shown for the maritime region represent individual party trips by extra-regional visitors and inter-provincial resident travellers exiting the region, or resident travellers tripping to destinations within their province of domicile. In the case of extra-regional and resident inter-provincial travel, party volume totals recorded by the region are less than the sum of individual provincial totals since many parties visited more than one province.

(b) Salient Features

(i) Considering all lengths of stay by extra-regional and resident travellers, there were approximately 3.4 million individual party trips to and within the maritime region during the Entire Season of 1971.

About 2.4 million or 70.6% of these trips were generated by residents of the maritime region travelling to destinations within provincial borders. The comparable proportionate strength of these trips in each province was as follows:- Nova Scotia - 76%, New Brunswick - 42%, Prince Edward Island - 58%. The division of the 2.4 million party trips by province was: Nova Scotia - 1.3

million - 54%, New Brunswick - .9 million - 38%, Prince Edward Island - .2 million - 8%.

(ii) Approximately 45,300 parties or 11.4% of the total represented maritime residents exiting the region through New Brunswick and Nova Scotia portals. Interestingly, there were about 365,100 internal border crossings by residents in the three Maritime Provinces combined. In a rough sense, resident travel between provinces was about seven times that of travel outside the region.

(iii) About 952,700 or 28% of the parties exiting the region represented extra-regional visitation. Comparable percentage values for each of the provinces were as follows:- Nova Scotia - 17, New Brunswick - 49, Prince Edward Island - 30. Clearly, extra-regional party trips are proportionately most significant in New Brunswick and least in Nova Scotia.

(iv) Parties visiting the region from overseas countries were inconsequential, totalling 5,800 or .2% of the total. It is expected that while this group will increase in number its proportional strength will remain unchanged in the foreseeable future.

(v) About 946,900 individual parties from the United States and points in Canada outside the Maritime Provinces exited the region, which was 28% of the total. Comparable percentage values for this group by provinces were: Nova Scotia - 17, New Brunswick - 49, Prince Edward Island - 30.

(vi) Of the 946,900 parties exiting the region, 593,300 or 59.8% were Americans and 353,600 or 35.6% Canadians.

Comparable values for the individual provinces were:
Nova Scotia:- Americans - 48.3%, Canadians - 51.7%;
New Brunswick:- Americans - 62.2%, Canadians -
37.8%; Prince Edward Island:- Americans - 44.3%,
Canadians - 55.7%. In this proportionate sense, Americans are strongest in New Brunswick, and Canadians in Prince Edward Island.

(vii) Approximately 48% of the extra-regional parties exiting Nova Scotia indicated extended stays in that province, and 33.2% of those exiting Prince Edward Island. In New Brunswick, only 11.1% fell into this category. Here, we have some measure of marked differences among the provinces in terms of the performance of destination and holding area functions.

(c) Some Impressions and Conclusions

(i) While there will be a substantive increase in the absolute volume of party trips to and within the Maritime Provinces in the years ahead, it is likely that the proportional division among the various groupings shown in Table S-1 will remain generally unchanged.

(ii) While local resident party tripping to destinations within the individual provinces is of major significance in the regional and provincial patterns, the overall volume totals are modest when compared with those associated with provinces and states containing massive and sophisticated tourist and recreation developments.

In 1971, Ontario residents probably undertook 15.0 million party trips to destinations within their

province.^{1/} The comparable value of 2.4 million for the Maritime Region is approximately 16% of that for Ontario. In contrast the population of the Maritime Provinces was about 19.4% of that of Ontario. The party tripping rates of the maritime region on a per capita basis are not significantly below those of Ontario, and markedly high when differences in overall economic conditions are considered. It is obvious, therefore, that the weakness in the local market stems primarily from population volume.

This weakness in total resident party tripping volume is of major consequence for all large scale sophisticated tourist and recreation complexes in Eastern North America have strong local markets within a 150-mile radius. It is upon day and weekend visitation from these markets that a substantive proportion of the viability of the commercial enterprises rests. Here, is a substantial and significant limitation in the market pattern of the Maritime Provinces.

(iii) The total volume of extra-regional visitation from the United States and Canada (946,900 parties) is substantial.

A comparison of values for American parties with those for Ontario, however, provides an interesting insight into market strength. In 1966 (July 1st to Sept. 30th), there were close to 2.9 million American parties exiting Ontario.

^{1/} This calculation is based on data contained in A Study of Travel Habits of Ontario Households, June 15, 1966 to June 14, 1967. Report No. 24, Ontario Department of Tourism and Information, June, 1969.

The value for the maritime region for 1971 was 20.6% of that for Ontario in 1969. In contrast the population of the Maritime Provinces in 1971 was 19.4% of that of Ontario. This close correspondence in percentage values is of interest, and suggests that the region is performing about as well as can be expected considering the overall geographic patterns of supply and demand.

3. The Seasonal Distribution of Parties Exiting the Maritime Provinces in 1971 - Table S-2

(a) Technical Comment

The table is based entirely upon information extracted from the Exit Survey of the Maritime Provinces of 1971. Canadian and American volume totals represent extra-regional visitation. Resident travel across provincial boundaries is shown separately.

(b) Salient Features

(i) Considering the Maritime Provinces as a region, all purposes of travel combined and all trips irrespective of length of stay, 748,300 parties or 75% exited in the Main Season, and 243,900 or 25% in the Extended Seasons. About 71% of the Canadian and 72% of the American parties exited in the Main Season. In a proportional sense, the Main Season focus for resident inter-provincial travel was even more pronounced - 78%.

(ii) Considering all types of trips irrespective of length of stay, but excluding commuter travel, values for each of the provinces reveal a particularly pronounced focus upon the Main Season.

Table S-2

THE SEASONAL DISTRIBUTION OF PARTIES EXITING THE MARITIME PROVINCES BY NATIONAL ORIGIN AND LENGTH OF STAY 1971

	<u>Day Trips</u>								<u>Overnight Trips</u>							
	Canadian		American		Resident		Total		Canadian		American		Resident		Total	
	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%
<u>Nova Scotia</u> ^{1/}																
Main Season	13.7	76	9.0	73	29.4	43	52.1	52	47.8	84	44.4	74	25.1	65	117.3	75
Extended Seasons	4.4	24	3.3	27	39.5	57	47.2	47	8.9	16	15.8	26	13.5	35	38.2	25
Entire Season	18.1	100	12.3	100	68.9	100	99.3	100	56.7	100	60.2	100	38.6	100	155.5	100
<u>New Brunswick</u> ^{1/}																
Main Season	128.7	82	297.9	71	92.6	74	519.2	74	154.7	88	172.6	81	41.6	78	368.9	84
Extended Seasons	28.3	18	123.8	29	33.0	26	185.1	26	20.2	12	40.2	19	11.9	22	72.3	16
Entire Season	157.0	100	421.7	100	125.6	100	704.3	100	174.9	100	212.8	100	53.5	100	441.2	100
<u>Prince Edward Is</u> ^{1/}																
Main Season	2.6	76	3.9	80	4.2	67	10.7	73	2.6	76	28.4	87	21.5	66	52.5	76
Extended Seasons	.8	24	1.0	20	2.1	33	3.9	27	.8	24	4.2	13	11.3	34	16.3	24
Entire Season	3.4	100	4.9	100	6.3	100	14.6	100	3.4	100	32.6	100	32.8	100	68.8	100
<u>Maritime Provinces</u> ^{2/}																
Main Season	-		-		-		-		-		-		-		-	
Extended Season	-		-		-		-		-		-		-		-	
Entire Season	-		-		-		-		-		-		-		-	

(Continued)

Table S-2

THE SEASONAL DISTRIBUTION OF PARTIES EXITING THE MARITIME PROVINCES BY NATIONAL ORIGIN AND LENGTH OF STAY 1971
(continued)

	<u>Extended Trips</u>								<u>All Trip Types</u>							
	Canadian		American		Resident		Total		Canadian		American		Resident		Total	
	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%
<u>Nova Scotia</u> ^{1/}																
Main Season	61.0	85	50.4	79	18.1	89	129.5	83	122.5	84	103.8	76	72.6	57	298.9	73
Extended Seasons	10.4	15	13.7	21	2.2	11	26.3	17	23.7	16	32.8	24	55.2	43	111.7	27
Entire Season	71.4	100	64.1	100	20.3	100	155.8	100	146.2	100	136.6	100	127.8	100	410.6	100
<u>New Brunswick</u> ^{1/}																
Main Season	70.2	88	37.2	90	12.0	68	119.4	86	353.6	86	507.7	75	146.2	74	1007.5	78
Extended Seasons	9.2	12	4.3	10	5.6	32	19.1	14	57.7	14	168.3	25	50.5	26	276.5	22
Entire Season	79.4	100	41.5	100	17.6	100	138.5	100	411.3	100	676.0	100	196.7	100	1284.0	100
<u>Prince Edward Is</u> ^{1/}																
Main Season	21.6	95	9.7	92	12.8	83	44.1	90	26.8	91	42.0	87	38.5	71	107.3	81
Extended Seasons	1.2	5	.9	8	2.6	17	4.7	10	2.8	9	6.1	13	16.0	29	24.9	19
Entire Season	22.8	100	10.6	100	15.4	100	48.8	100	29.6	100	48.1	100	54.5	100	132.2	100
<u>Maritime Provinces</u> ^{2/}																
Main Season									389.0	71	424.4	72	35.4	78	748.3	75
Extended Seasons									159.0	29	168.9	28	9.9	22	243.9	25
Entire Season									548.0	100	593.3	100	45.3	100	992.2	100

^{1/} Based on Tables C-9 to C-15. Includes all purposes of travel except commuting. Entire Season covers May 15th to October 31st. Main Season covers June 15th to September 15th. Extended Spring and Fall Seasons cover May 15th to June 14th and September 16th to October 31st.

^{2/} Based on Table C-21 - commuters are included.

About 84% of the Canadian parties exited Nova Scotia in this season, 86% - New Brunswick, and 91% - Prince Edward Island.

The Main Season concentration was not quite so pronounced in the case of Americans where the percentage values by province were: Nova Scotia - 76, New Brunswick - 75, Prince Edward Island - 87.

In Nova Scotia, only 57% of the resident travel occurred in the Main Season, but the values for New Brunswick and Prince Edward Island were 74 and 71 percent respectively.

Considering American, Canadian and resident travellers in combination, the percentage attributable to the Main Season by province is as follows: Nova Scotia - 73, New Brunswick - 78, Prince Edward Island - 81.

In an overall sense, the focus upon the Main Season was most pronounced in Prince Edward Island, where visitation in the Extended (spring and fall) Season is weakest in both a proportionate and absolute sense. Extended Season travel is proportionately strongest in Nova Scotia, but in a volume sense it is only about 53% of that registered by New Brunswick.

(iii) The Main Season concentration is most pronounced in the case of the trips with extended stays, and particularly in the case of extra-regional Canadian and American visitor parties. The percentage of Canadian parties exiting in this season by province was: Nova Scotia - 85, New Brunswick - 88, Prince Edward Island - 95%. Corresponding percentages for American parties were: Nova Scotia - 79, New Brunswick - 90, Prince Edward Island - 92.

Maritime resident trips of an extended-stay type were

somewhat less focused in the Main Season in New Brunswick, where percentage value was 68. In the case of Prince Edward Island, however, 83% of the resident vehicle parties exited in the Main Season, and 89% in Nova Scotia.

(iv) The Main Season focus for trips with overnight stays is again very pronounced for Canadian exiting parties with the percentage values by province being: Nova Scotia - 84, New Brunswick - 88, Prince Edward Island - 76. Comparable values for the American parties were Nova Scotia - 74%, New Brunswick - 81%, Prince Edward Island - 87%.

The Main Season concentration for resident travel was less marked: Nova Scotia - 65%, New Brunswick - 78%, Prince Edward Island - 66%.

(v) Focus on the Main Season was somewhat less pronounced in the case of day trips. In the case of Canadian exiting parties, the percentage for this season by province was: Nova Scotia - 76, New Brunswick - 82, Prince Edward Island - 76. Comparable values for American parties were: Nova Scotia - 73%, New Brunswick - 71%, Prince Edward Island - 80%.

In the case of Nova Scotia, resident travel on daytrips during the Main Season accounted for only 43% of the total, This is the only instance where Extended Season travel was proportionally greater than that in the Main Season.

(c) Some Impressions and Conclusions

(i) The climate of the Maritime Provinces, the pronounced focus of family holiday-taking in the summer season, the limited winter opportunities for recreation, and the closing or minimal operation of many of the attractions of the region ensure that the Main Season concentration will persist.

(ii) It is anticipated that there will be a growth in the volume total of travel in the Extended Seasons, and it is upon this that the off-season operation of commercial enterprises must be built rather than upon any attempt to shift the focus of visitation into these seasons.

4. Origin Area Patterns - Tables S-3 & S-4

(a) Technical Comment

The analysis is based entirely upon data obtained from the Exit Survey of the Maritime Provinces of 1971. Table S-3 represents the recapitulation of the situation by provinces during the Entire Season on the basis of travel for all purposes and of all lengths of stay. Table S-4 contains a ranking for the major origin areas, and the percentage values for each in relation to total exiting parties from these areas.

(b) Salient Features

(i) In Table S-3 the significance of inter-provincial travel by residents of the Maritime Provinces is clearly indicated by the percentage of total parties attributable to this origin-area category.

Its strength is greatest in Nova Scotia and Prince Edward Island where the values are 34.4 and 34.3 percent respectively. The grouping is considerably less important in New Brunswick - 16.1%.

(ii) Considering only the values shown in Table S-3 for

Table S-3

ORIGIN OF PARTIES EXITING THE MARITIME PROVINCES ENTIRE SEASON (MAY 15 - OCT. 31) IN 1971 - ALL PURPOSES AND TYPES OF TRAVEL

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Province, State & Region	NOVA SCOTIA ^{1/}			Per 1,000 pop.	NEW BRUNSWICK ^{1/}			Per 1,000 pop.	PRINCE EDWARD I.S. ^{1/}			Per 1,000 pop.	MARITIME PROVINCES ^{2/}		
	(000)	%	%		(000)	%	%		(000)	%	%		(000)	%	%
A. U.S.A.															
1. New England															
Maine	10.6	2.5	7.7		326.4	23.4	46.1		3.7	2.2	8.1		313.1	31.5	52.8
Massachusetts	28.1	6.5	20.6		95.9	6.9	13.5		11.1	6.7	24.3		63.8	6.4	10.8
Rest	25.5	6.0	18.7		85.6	6.1	12.1		7.5	4.6	16.5		69.4	7.0	11.7
Total I	64.2	15.0	47.0	.005	507.9	36.4	71.7	.043	22.3	13.5	48.9	.002	446.3	44.9	75.3
2. Mid Atlantic															
New York	21.0	4.9	15.4		51.9	3.7	7.3		7.2	4.4	15.8		36.8	3.7	6.2
New Jersey	9.5	2.2	7.0		26.1	1.9	3.7		2.7	1.6	5.9		20.8	2.1	3.5
Pennsylvania	5.9	1.4	4.3		19.0	1.4	2.7		2.4	1.5	5.3		15.0	1.5	2.5
Total II	36.4	8.5	26.7	.001	97.0	7.0	13.7	.003	12.3	7.5	27.0	.0003	72.6	7.3	12.2
I North East Census Geo. Reg.	100.6	23.5	73.7	.002	604.9	43.4	85.4	.012	34.6	21.0	75.9	.0007	518.9	52.2	87.5
1. South Atlantic	13.9	3.2	10.2		34.8	2.6	4.9		3.4	2.0	7.5		25.7	2.6	4.3
2. East South Central	1.6	.4	1.2		1.8		.2		.2	.1	.4		1.7	.2	.3
3. West South Central	.9	.2	.6		5.4	.3	.8		.6	.4	1.3		5.4	.5	.9
II South Census Geo. Reg.	16.4	3.8	12.0	.0003	42.0	2.9	5.9	.0007	4.2	2.5	9.2	.00007	32.8	3.3	5.5
1. East North Central	13.1	3.1	9.6		38.7	2.8	5.5		4.3	2.6	9.4		26.1	2.6	4.4
2. West North Central	1.9	.3	1.4		8.9	.6	1.2		1.2	.7	2.7		6.1	.6	1.0
III North Central Census Geo. Reg.	15.0	3.4	11.0	.0003	47.6	3.4	6.7	.0008	5.5	3.3	12.1	.00009	32.2	3.2	5.4
1. California	2.6	.6	1.9		9.6	.7	1.4		.8	.5	1.7		1.9	.2	.3
2. Rest	1.9	.3	1.4		4.5	.3	.6		.5	.3	1.1		7.5	.8	1.3
IV West Census Geographical Reg.	4.5	.9	3.3	.0001	14.1	1.0	2.0	.0004	1.3	.8	2.8	.00003	9.4	1.0	1.6
Total A - U.S.A.	136.5	31.6	100.0	.0005	708.6	50.8	100.0	.002	45.6	27.6	100.0	.0002	593.3	59.7	100.0

(continued)

Table S-3 (continued)

ORIGIN OF PARTIES EXITING THE MARITIME PROVINCES ENTIRE SEASON (MAY 15 - OCT. 31) IN 1971 - ALL PURPOSES AND TYPES OF TRAVEL

ORIGIN AREAS	NOVA SCOTIA ^{1/}			Per 1,000 pop.	NEW BRUNSWICK ^{1/}			Per 1,000 pop.	PRINCE EDWARD IS. ^{1/}			Per 1,000 pop.	MARITIME PROVINCES ^{2/}			
	(000)	%	%		(000)	%	%		(000)	%	%		(000)	%	%	
B. Canada																
1. Nova Scotia					192.6	13.8	28.2	.244	33.5	20.3	28.2	.042	40.0	4.0	10.0	
2. New Brunswick	138.3	32.1	47.0	.218					23.1	14.0	19.4	.036	1.5	.2	.4	
3. Prince Edward Island	9.7	2.3	3.3	.087	31.9	2.3	4.6	.286					3.8	.4	.9	
Maritime Provinces	148.0	34.4	50.3	.198	224.5	16.1	32.8	.249	56.6	34.3	47.6	.040	45.3	4.6	11.3	
4. Newfoundland	13.9	3.2	4.7	.026	11.7	.8	1.7	.022	2.1	1.3	1.8	.004	10.1	1.0	2.5	
I Atlantic Provinces	161.9	37.6	55.0	.128	236.2	16.9	34.5	.166	58.7	35.6	49.4	.030	55.4	5.6	13.8	
1. Quebec	24.2	5.6	8.2	.004	214.0	15.3	31.3	.036	17.6	10.7	14.8	.003	193.0	19.4	48.4	
2. Ontario	101.1	23.5	34.4	.013	215.7	15.5	31.6	.028	38.5	23.3	32.4	.005	139.5	14.0	35.0	
II Central Provinces	125.3	29.1	42.6	.009	429.7	30.8	62.9	.031	56.1	34.0	47.2	.004	332.5	33.4	83.4	
1. Manitoba	1.9	.4	.7	.002	3.4	.2	.5	.003	.8	.5	.7	.0008	1.8	.2	.5	
2. Saskatchewan	.7	.2	.2	.0008	1.1	.1	.2	.001	.3	.2	.2	.0003	1.0	.1	.2	
3. Alberta	2.0	.5	.7	.001	8.3	.6	1.2	.005	1.3	.8	1.1	.0008	1.5	.5	1.4	
III Prairie Provinces	4.6	1.1	1.6	.001	12.8	.9	1.9	.004	2.4	1.5	2.0	.0007	8.3	.8	2.1	
IV B.C. & Territories	2.5	.6	.8	.001	4.9	.4	.7	.002	1.6	1.0	1.4	.0007	2.7	.3	.7	
Total B. - Canada	294.3	68.4	100.0	.014	683.6	49.0	100.0	.032	118.8	72.1	100.0	.006	398.9	40.1	100.0	
C. Foreign	.1				.9	.1			.5	.3			.7	.1		
D. Unknown	.1				1.2	.1							1.0	.1		
Total - A. to D.	431.0	100.0			1,394.3	100.0			164.9	100.0			993.9	100.0		

^{1/} Data from Table C-7 - All purposes of travel, including commuting.

^{2/} Data from Table C-21 - Excludes commuter parties staying less than 24 hours.

Table S-4

RANKINGS FOR MAJOR ORIGIN AREAS ^{1/}

ORIGIN AREAS	<u>NOVA SCOTIA</u>						<u>NEW BRUNSWICK</u>						<u>PRINCE EDWARD ISLAND</u>					
	Trips		Trips		Trips		Trips		Trips		Trips		Trips		Trips			
	Day	Overnight	Extended	Day	Overnight	Extended	Day	Overnight	Extended	Day	Overnight	Extended	Day	Overnight	Extended			
Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	Rank	% ^{2/}	
New England Census Region	III	7.6	III	18.3	II	18.2	I	40.1	II	25.1	II	18.4	III	12.9	III	14.8	III	13.3
Mid Atlantic Census Region	IV	2.7	IV	9.5	IV	12.1	IV	5.6	IV	11.1	IV	6.1	IV	10.9	IV	8.6	IV	5.2
Maritime Provinces	I	69.4	I	34.8	III	13.0	III	17.8	III	12.1	III	12.7	I	42.8	II	35.7	II	31.6
Central Can. Prov.	II	10.8	II	31.4	I	42.2	II	20.9	I	36.4	I	51.5	II	21.1	I	43.3	I	42.2

^{1/} Based on data presented in Tables C-9, C-10, C-11 which cover the Entire Season, May 15th to October 31st.

^{2/} Refers to percentage of total exiting parties from all origin areas in Canada and United States, reporting the particular length of stay indicated. Percentage values show the relative strength of a particular origin area.

extra-regional visitation, the overall dominance of American parties is clearly evident. On a maritime region basis visitors from the United States presented 63% of the total. Corresponding values for New Brunswick and Prince Edward Island were - 61 and 55 percent respectively. In Nova Scotia, however, only 48% of the exiting parties were American.

(iii) In Table S-4, rankings for major origin areas are indicated in terms of day, overnight and extended trips. One of the most notable features is the complexity of the pattern. While the Mid-Atlantic Census Region of origin retains fourth ranking status throughout, all other origin areas display shifts in ranking from I to III depending upon the length of stay involved.

(c) Some Impressions and Conclusions

It is expected that the ranking in proportionate values displayed in Tables S-3 & S-4 for major origin areas will persist. They are the result of basic geographic, social and economic factors working in combination, and cannot be shifted to any substantive degree by advertising and promotion efforts.

III. TRIP PURPOSE AND ACTIVITY PARTICIPATION, EXPECTATION AND REALIZATION

1. Introduction

The four Tables S-5 to S-8 inclusive have been based entirely upon information obtained from the Exit Survey of the Maritime Provinces of 1971. Tables S-5 & S-6 indicate trip purposes for parties exiting the individual Maritime Provinces during the Entire and Main Seasons. Tables S-7 & S-8 deal with activity participation, expectation and realization.

The analysis of trip purpose is a common characteristic of most tourist and recreational studies. The examination of activity participation, expectation and realization, particularly the data presented in Table S-8 contains several novel features of significance to tourist and recreational planning.

Unfortunately no readily available comparable data for unfulfilled expectation are at hand for major tourist and resort centres in other parts of North America. It is, therefore, difficult to determine the full significance of the data presented. Unquestionably all resort areas display a degree of unfulfilled expectation for a variety of reasons. Comparable data would enable a more sophisticated interpretation for the results obtained in this study. Nevertheless, the scale of unfulfilled expectation emerging in this study cannot be summarily dismissed.

2. Trip Purpose in the Entire and Main Seasons - Tables S-5 & S-6

(a) Technical Comment

The universe of travellers encompassed in Table S-5 covering the Entire Season includes commuters. Commuters staying less than twenty-four hours in a province are excluded in Table S-6 related to parties exiting in the Main Season. Therefore, the universe of exiting parties included in each table is not comparable.

Two general categories of trip purpose are recognized, namely, non-tourist and recreational travel, and tourist and recreational travel. Four classes of travel are identified under the former category, namely, commuting, business-and-work transfer, personal and convention. Three classes of travel are recognized under the latter category, namely, visits to friends and relatives, participation in outdoor sports and general sight-seeing.

Table S-5

PURPOSE OF TRIPS TO THE MARITIME PROVINCES ENTIRE SEASON 1971 ^{1/}

	NOVA SCOTIA		NEW BRUNSWICK		PRINCE EDWARD ISLAND	
	Parties (000)	%	Parties (000)	%	Parties (000)	%
A <u>Non Tourist & Recreation Travel</u>						
I <u>Commuting</u> ^{2/}						
Staying less than 24 hours	9.8	2.3	47.6	3.4	.1	.1
Staying more than 24 hours ^{5/}	3.8	.9	10.6	.8	.9	.5
Total I	13.6	3.2	58.2	4.2	1.0	.6
II <u>Business & Work Transfer</u>						
Business	34.1	7.9	96.1	6.9	15.0	9.1
Military & Education ^{3/}	2.5	.6	11.1	.8	.2	.1
Other ^{4/}	42.7	9.9	225.0	16.1	1.4	.9
Total II	79.3	18.4	332.2	23.8	16.6	10.1
III <u>Personal</u>						
Shopping	23.7	5.5	61.7	4.4	.1	-
Other Personal Affairs	15.6	3.6	138.7	9.9	4.7	2.9
Total III	39.3	9.1	200.4	14.3	4.8	2.9
IV <u>Conventions</u>	7.4	1.7	11.3	.8	.6	.4
Total A	139.6	32.4	602.1	43.1	23.0	14.0

(continued)

Table S-5 (continued)

PURPOSE OF TRIPS TO THE MAR TIME PROVINCES ENTIRE SEASON 1971 ^{1/}

	<u>N O V A S C O T I A</u>			<u>N E W B R U N S W I C K</u>			<u>P R I N C E E D W A R D I S L A N D</u>		
	Parties (000)	%	%	Parties (000)	%	%	Parties (000)	%	%
<u>B Tourist & Recreation Travel</u>									
I Visit Friends and Relatives	88.4	20.5	30.3	93.0	21.0	37.0	21.9	13.3	15.4
II Outdoor Sports	6.9	1.6	2.4	29.0	2.1	3.6	11.4	6.9	8.0
III Sightseeing	196.1	45.5	67.3	70.2	33.8	59.4	108.6	65.9	76.6
Total B	291.4	67.6	100.0	92.1	56.9	100.0	141.9	86.0	100.0
Total A & B	431.0	100.0		94.3	100.0		164.9	100.0	

^{1/} Source Ibid: includes parties exiting PEI by bus and plane.

^{2/} Involves travel for work purposes.

^{3/} Includes travelling to or from military and educational institutions.

^{4/} Includes travel to a new job, change of residence or attendance at school.

^{5/} Some commuters apparently stay overnight for various reasons.

Table S-6

MAIN PURPOSE OF TRIPS BY TOURIST PARTIES TO NOVA SCOTIA, NEW BRUNSWICK AND PRINCE EDWARD ISLAND IN THE MAIN SEASON (JUNE 15 - SEPT. 15) 1971^{1/}

	NOVA SCOTIA						NEW BRUNSWICK						PRINCE EDWARD ISLAND						
	Canadian (000) %		American (000) %		Combined (000) %		Canadian (000) %		American (000) %		Combined (000) %		Canadian (000) %		American (000) %		Combined (000) %		
A <u>NON TOURIST & RECREATION TRAVEL</u>																			
I <u>Commuting Staying More than 1 day</u>	2.8	1.9	-	-	2.8	1.1	9.7	3.0	.8	.3	10.5	1.8	.5	.6	-	-	.5	.4	
II <u>Business and Work Transfer</u>																			
Business	12.1	8.0	.5	.5	12.6	5.1	21.7	6.7	4.3	1.7	26.0	4.5	4.9	5.7	.4	1.1	5.3	4.3	
Military Education	.5	.3	1.2	1.3	1.7	.7	3.1	.9	.9	.4	4.0	.7	-	-	.1	.3	.1	.1	
Other	15.5	10.2	6.0	6.3	21.5	8.7	37.3	11.5	20.4	8.0	57.7	9.9	.9	1.0	.1	.3	1.0	1.0	
Total II	28.1	18.5	7.7	8.1	35.8	14.5	62.1	19.1	25.6	10.1	87.7	15.1	5.8	6.7	.6	1.7	6.4	5.2	
III <u>Personal</u>																			
Shopping	.6	.4	.1	.1	.7	.3	1.3	.4	.9	.4	2.2	.4	.1	.1	-	-	.1	.1	
Other Personal Affairs	2.5	1.6	.9	1.0	3.4	1.4	15.7	4.8	9.1	3.6	24.8	4.3	2.2	2.6	.3	.8	2.5	2.0	
Total III	3.1	2.0	1.0	1.1	4.1	1.7	17.0	5.2	10.0	4.0	27.0	4.7	2.3	2.7	.3	.8	2.6	2.1	
IV Conventions	.9	.6	5.6	5.9	6.5	2.6	1.2	.4	2.7	1.1	3.9	.7	.2	.2	.1	.3	.3	.3	
Total A	34.9	23.0	14.3	15.1	49.2	19.9	90.0	27.7	39.1	15.5	129.1	22.3	8.8	10.2	1.0	2.8	9.8	8.0	

(continued)

Table S-6 (continued)

MAIN PURPOSE OF TRIPS BY TOURIST PARTIES TO NOVA SCOTIA, NEW BRUNSWICK AND PRINCE EDWARD ISLAND IN THE MAIN SEASON (JUNE 15 - SEPT. 15) 1971 ^{1/}

	NOVA SCOTIA						NEW BRUNSWICK						PRINCE EDWARD ISLAND					
	Canadian		American		Combined		Canadian		American		Combined		Canadian		American		Combined	
	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%
B	<u>TOURIST AND RECREATION TRAVEL</u>																	
I	Visit Friends and Relatives																	
II	Outdoor Sports																	
III	Sight Seeing																	
	41.2	27.1	10.9	11.5	52.1	21.1	87.3	26.8	58.5	23.0	145.8	25.1	12.5	14.4	2.8	7.9	15.3	12.5
	1.7	1.1	.4	.4	2.1	.9	3.8	1.1	7.6	3.0	11.4	2.0	8.4	9.7	1.9	5.4	10.3	8.5
	74.3	48.8	69.2	73.0	143.5	58.1	144.5	44.4	148.7	58.5	293.2	50.6	57.0	65.7	29.6	83.9	86.6	71.0
Total B	117.2	77.0	80.5	84.9	197.7	80.1	235.6	72.3	214.8	84.5	450.4	77.7	77.9	89.8	34.3	97.2	112.2	92.0
Total A and B	152.1	100.0	94.8	100.0	246.9	100.0	325.6	100.0	253.9	100.0	579.5	100.0	86.7	100.0	35.3	100.0	122.0	100.0

^{1/} Source Ibid. - Excludes commuters staying less than 24 hours.

(b) Salient Features

(i) The tourist and recreational trip category dominates the pattern in the Entire Season, accounting for the following percentage of all trips by province: Nova Scotia - 68, New Brunswick - 57, Prince Edward Island - 86. In the Main Season, in which commuter travel is excluded, the dominance of this purpose category is even greater with corresponding percentage values being: Nova Scotia - 80, New Brunswick - 78, Prince Edward Island - 92.

Tourist and recreational trip purposes are most significant in a proportionate sense in Prince Edward Island, where they accounted for 86% of the trips in the Entire Season, and 92% in the Main Season.

(ii) Sightseeing was the dominant individual trip purpose class during the Entire Season. In Nova Scotia, 45% of all exiting parties indicated this travel motivation and 67% of those within the tourist and recreational category. Corresponding values for New Brunswick were 34% and 59%, and for Prince Edward Island - 66% and 77%.

During the Main Season 58% of all parties exiting Nova Scotia indicated this trip purpose class, and 73% of those with purposes falling within the tourist and recreational category. Similar values for New Brunswick were 51% and 65%, and for Prince Edward Island - 71% and 77%.

(iii) Visits to friends and relatives ranked second among the individual trip purpose classes, but in both absolute and proportionate sense were far less important than

sightseeing. Considering the results of many previous surveys that have indicated an extremely strong focus upon this trip purpose the results of the analysis of the 1971 Exit Survey of the Maritime Provinces are interesting.

In the Entire Season 20% of all parties exiting Nova Scotia, and 30% of those within the tourist and recreation travel purpose category listed this trip motivation. Corresponding values for New Brunswick were 21% and 37%, Prince Edward Island - 13% and 15%.

In the Main Season 21% of the parties exiting Nova Scotia listed visits to friends and relatives as a main trip purpose, and 26% of those included under the tourist and recreation travel category. Corresponding values for New Brunswick were 25% and 32%, Prince Edward Island - 12% and 14%.

This trip purpose class is clearly of least significance in terms of absolute numbers and percentage values in the case of Prince Edward Island.

(iv) Participation in outdoor sports as a primary trip purpose is of modest consequence in both an absolute and relative sense. Some non-tourist and recreational travel purposes, such as business and personal affairs, are of greater importance.

(v) Conventions were of minor importance. This is to be expected since the time period covered by the Exit Survey coincided in a large part with that season of the year in which convention activity is at its lowest point.

3. Activity Participation, Expectation and Realization -
Tables S-7 & S-8

(a) Technical Comment

In Table S-7, the number of exiting parties participating in an activity is indicated by province, together with the percentage of the total exiting parties that the group represents. Similar information is presented for parties that did not expect to participate and for those that expected to, but did not.

Data are presented on the basis of the Entire Season, and involve all trip purposes, including commuting.

The discussion of salient points that follows is focused in part upon the major activities as determined by a percentage evaluation of the total number listed for each province, and generally is centred around ranking concepts. In effect, the discussion goes beyond the data presented in Table S-7.

In Table S-8, unfulfilled expectation to participate in various activities is examined on the basis of the responses of parties exiting during the Entire Season. Some interesting and significant relationships emerge in this instance.

(b) Salient Features

(i) From Table S-8, it can be concluded that sightseeing in cities and towns combined, or what might be termed urban sightseeing, ranked first among all activities in every province, including Prince Edward Island. The significance of the urban complex in the landscape touring pattern is clearly demonstrated, and this is probably one of the most important features to emerge from the analysis.

ACTIVITY PARTICIPATION, EXPECTATION AND REALIZATION BY RESPONDENT PARTIES ^{1/}

Table S-7

	No & Did Not Expect To Parties		NOVA SCOTIA		Did Partic- ipate In Parties		No & Did Not Expect To Parties		NEW BRUNSWICK		Did Partic- ipate In Parties		No & Did Not Expect To Parties		PRINCE EDWARD ISLAND		Did Partic- ipate In Parties	
			Expected To But Did Not Parties						Expected To But Did Not Parties						Expected To But Did Not Parties			
	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%	(000)	%
GOING TO BEACH	299.5	69.5	13.7	3.2	117.8	27.3	1203.7	86.3	34.6	2.5	156.0	11.2	67.3	40.8	5.2	3.1	92.3	56.0
SWIMMING	324.4	75.3	18.6	4.3	88.0	20.4	1227.7	88.0	41.3	3.0	125.3	9.0	89.5	54.3	13.1	8.0	62.3	37.8
FRESH WATER ANGLING	393.4	91.3	16.6	3.8	21.1	4.9	1302.6	93.4	40.3	2.9	51.4	3.7	149.8	90.8	5.2	3.2	9.9	6.0
SALT WATER ANGLING	383.2	88.9	18.9	4.4	28.9	6.7	1350.5	96.8	13.7	1.0	30.1	2.2	137.2	83.2	10.3	6.3	17.3	10.5
SAILING	423.4	98.2	5.3	1.2	2.3	.5	1374.2	98.6	8.4	.6	11.7	.8	161.1	97.7	1.3	.8	2.5	1.5
CANOEING	424.9	98.6	2.7	.6	3.4	.8	1367.7	98.1	9.2	.7	17.4	1.2	159.5	96.7	1.6	1.0	3.8	2.3
OTHER BOATING	407.4	94.5	4.5	1.0	19.1	4.4	1352.7	97.0	9.6	.7	32.0	2.3	155.7	94.4	1.8	1.1	7.4	4.5
GOLFING	408.1	94.7	8.8	2.0	14.1	3.3	1336.3	95.8	22.1	1.6	35.9	2.6	145.0	87.9	5.4	3.3	14.6	8.8
HIKING	387.5	89.9	7.8	1.8	35.7	8.3	1330.9	95.4	7.9	.6	55.5	4.0	144.8	87.8	9.0	.5	19.2	11.7
HUNTING	413.2	95.8	2.7	.6	15.1	3.5	1374.4	98.6	13.0	.9	6.9	.5	160.6	97.4	.6	.4	3.7	2.2
PICNICKING	354.9	82.3	4.6	1.1	71.5	16.6	1235.3	88.6	15.9	1.1	143.1	10.3	127.2	77.1	1.2	.7	36.5	22.1
TENNIS	424.9	98.6	3.9	.9	2.2	.5	1370.7	98.3	12.0	.9	11.6	.8	157.6	95.5	1.6	1.0	5.8	3.5
SPECTATOR SPORTS	410.6	95.3	4.6	1.1	15.8	3.7	1366.0	98.0	6.8	.5	21.5	1.5	153.1	92.8	2.2	1.3	9.6	5.8
LOCAL EVENTS	402.1	93.3	4.6	1.1	24.3	5.6	1340.0	96.1	8.9	.6	45.4	3.3	144.8	87.8	2.1	1.3	18.0	10.9
LIVE THEATRE	419.4	97.3	4.1	1.0	7.5	1.5	1377.5	98.8	8.6	.6	8.2	.6	140.3	85.1	7.1	4.3	17.4	10.6
CULTURE EVENTS	320.2	74.3	9.2	2.1	101.6	23.6	1267.1	90.9	15.6	1.1	111.6	8.0	95.4	57.8	4.2	2.5	65.3	39.6
WILDLIFE PARKS	396.3	91.9	7.4	1.7	27.3	6.3	1327.3	95.2	13.6	1.0	53.4	3.8	134.1	81.3	2.9	1.8	27.9	16.9
NATIONAL PARKS	339.4	78.8	6.6	1.5	85.0	19.7	1289.7	92.5	12.9	.9	91.7	6.6	102.6	62.2	1.4	.9	60.8	36.9
SHOPPING	231.0	53.6	4.3	1.0	195.7	45.4	1104.3	79.2	15.6	1.1	274.4	19.7	82.2	49.9	1.8	1.1	80.9	49.1
CITY SIGHT-SEEING	221.4	51.4	3.3	.8	206.3	47.9	1032.9	74.1	13.5	1.0	347.9	24.9	58.7	35.6	2.1	1.3	104.0	63.1
TOWN SIGHT-SEEING	204.2	47.4	3.0	.7	223.8	51.9	1026.8	73.6	9.8	.7	357.7	25.7	52.2	31.7	1.5	.9	111.2	67.4

^{1/} Source Ibid. Includes all parties, purposes and types of travel including commuting and air and bus travellers exiting P.E.I.

^{2/} Did not expect to participate in an activity and in fact did not participate.

^{3/} Expected to participate in an activity but did not do so.

^{4/} Participated in an activity. Includes those who expected to participate and those who did not expect to.

Table S-8

UNFULFILLED EXPECTATION TO PARTICIPATE IN VARIOUS ACTIVITIES BY PARTIES EXITING THE MARITIME PROVINCES IN THE ENTIRE SEASON 1971

	NOVA SCOTIA			NEW BRUNSWICK			PRINCE EDWARD ISLAND		
	(000) ^{2/}	%	% ^{3/}	(000) ^{2/}	%	% ^{3/}	(000) ^{2/}	%	% ^{3/}
1. Going to the Beach	13.7	8.8	11.6	34.6	10.4	22.2	5.2	6.4	5.6
2. Swimming	18.6	2.0	21.1	41.3	12.4	33.0	13.1	16.0	21.0
Beach & Swimming 1 & 2	32.3	20.8	15.7	75.9	22.8	27.0	18.3	22.4	11.8
3. Fresh Water Angling	16.6	10.7	78.7	40.3	12.1	78.4	5.2	6.4	57.8
4. Salt Water Angling	18.9	12.2	65.4	13.7	4.1	45.5	10.3	12.6	59.5
Angling 3 & 4	35.5	22.9	71.0	54.0	16.2	66.3	15.5	19.0	57.0
5. Sailing	5.3	3.4	130.0	8.4	2.5	71.8	1.3	1.6	52.0
6. Canoeing	2.7	1.7	79.4	9.2	2.8	52.9	1.6	2.0	42.1
7. Other Boating	4.5	2.9	23.6	9.6	2.9	30.0	1.8	2.2	24.3
Boating 5,6,& 7	12.5	8.0	46.1	27.2	8.2	44.5	4.7	5.8	34.3
Water Based 1 to 7	80.3	51.7	28.6	157.1	47.2	37.1	38.5	47.2	19.7
8. Golfing	8.8	5.7	62.4	22.1	6.6	61.6	5.4	6.6	37.0
9. Hiking	7.8	5.0	21.8	7.9	2.3	14.2	9.0	11.0	46.9
10. Hunting	2.7	1.7	17.9	13.0	3.9	188.4	.6	.7	16.2
11. Picnicking	4.6	3.0	27.7	15.9	4.8	11.1	1.2	1.5	3.3
12. Tennis	3.9	2.5	177.3	12.0	3.6	103.4	1.6	2.0	27.6
13. Spectator Sports	4.6	3.0	29.1	6.8	2.0	31.6	2.2	2.7	22.9
14. Local Events	4.6	3.0	18.9	8.9	2.6	19.6	2.1	2.6	11.7
15. Live Theatre	4.1	2.6	54.7	8.6	2.6	104.9	7.1	8.7	40.8
16. Cultural Events	9.2	5.9	9.0	15.6	4.7	14.0	4.2	5.1	6.4
17. Wildlife Parks	7.4	4.8	27.1	13.6	4.1	25.5	2.9	3.6	10.4

(continued)

Table S-8 (continued)

UNFILLED EXPECTATION TO PARTICIPATE IN VARIOUS ACTIVITIES BY PARTIES EXITING THE MARITIME PROVINCES IN THE ENTIRE SEASON 1971

	NOVA SCOTIA			NEW BRUNSWICK			PRINCE EDWARD ISLAND		
	(000) ^{2/}	%	% ^{3/}	(000) ^{2/}	%	% ^{3/}	(000) ^{2/}	%	% ^{3/}
18.. National Parks	6.6	4.3	7.7	12.9	3.9	14.1	1.4	1.7	2.3
19.. Shopping	4.3	2.8	2.2	15.6	4.7	5.6	1.8	2.2	2.2
20.. City Sightseeing	3.3	2.1	1.5	13.5	4.1	3.9	2.1	2.6	2.0
21.. Town Sightseeing	3.0	1.9	.3	9.8	2.9	2.7	1.5	1.8	1.3
Urban Sightseeing 20 & 21	6.3	4.0	1.5	23.3	7.0	3.3	3.6	4.4	1.7
Total 1 to 21	155.2	100.0	11.9	333.3	100.0	16.8	81.6	100.0	10.6

^{1/} Based on Table S-1.

^{2/} Represents number of parties that expected to participate in an activity but did not.

^{3/} Indicates the percentage value for parties that expected to participate in an activity but did not relative to the number of parties that actually participated.

By province, the number of listings for city and town sightseeing as a percentage of the total number of activities listed was as follows:- Nova Scotia - 32.8%, New Brunswick - 35.5%, Prince Edward Island - 27.9%.

In Nova Scotia, 47.9% of all exiting parties participated in city sightseeing, with comparable values for the other two provinces being: New Brunswick - 24.9%, Prince Edward Island - 63.1%.

In Nova Scotia, 51.9% of the exiting parties participated in town sightseeing, 25.7% in New Brunswick and 67.4% in Prince Edward Island.

(ii) In all provinces second rank status was assumed by the activities "going to the beach" and "swimming" considered in combination.

In Nova Scotia, about 15.7% of the total number of activities listed by exiting parties fell into this grouping, and values for New Brunswick and Prince Edward Island were 14.7% and 20.1% respectively.

In New Brunswick and Nova Scotia, these activities are very markedly subservient to urban sightseeing. In Prince Edward Island the difference is not quite so pronounced.

(iii) In all three provinces third rank status was assumed by shopping as an activity.

In Nova Scotia, 14.9% of all activity mentions by exiting parties were of this type, and 13.8% in New Brunswick. In Prince Edward Island the value was only 10.5%.

In both Nova Scotia and New Brunswick the above percentage values are extremely close to those related to beaching and swimming. In Prince Edward Island on the other hand, the value was only about half as large as that for beaching and swimming.

(iv) Attendance at cultural events assumed Rank IV status in Nova Scotia and Prince Edward Island. In Nova Scotia, about 7.8% of all activities listed by exiting parties fell into this category, while the comparable value in Prince Edward Island was 8.5%. Interestingly, attendance at cultural events assumed fifth rank status in New Brunswick where only 5.6% of all activities listed were related to cultural events. Fourth ranking status in this province was assumed by picnicking, where the percentage value was 7.2.

(v) Angling of both the fresh and salt water variety assumed modest proportions in all three provinces. In Nova Scotia, only 3.8% of all activity mentions by exiting parties fell into this category. Comparable values for New Brunswick and Prince Edward Island were 4.1% and 3.5% respectively.

(vi) Sailing, canoeing and other boating in combination were again of modest significance. Only 2.0% of all activities listed by parties exiting Nova Scotia fell into this category. Comparable values for New Brunswick and Prince Edward Island were 3.1 and 1.8 percent respectively.

(vii) The first seven activities listed in Table S-7 combined, or what might be termed water-based activity, assumed less significance than urban sightseeing.

In Nova Scotia, 21.5% of all activities listed were of the water-based type. Comparable values for New Brunswick and Prince Edward Island were 21.3 and 25.4 percent respectively.

While water-based activities are of significance the urban landscape seems to be dominant. On the other hand, a comparison in terms of the actual time spent in participation might suggest a somewhat different emphasis.

(viii) From Table S-8, it is clear that there is little unfulfilled expectation associated with urban sightseeing. Considering that the total number of unfulfilled expectations listed by parties exiting Nova Scotia, only 4% were associated with urban sightseeing. The comparable value in New Brunswick was 7%, Prince Edward Island - 4.4%.

The percentage values for parties that expected to participate in urban sightseeing, but did not, relative to the number of parties that actually did participate is extremely low. The values per province are: Nova Scotia - 1.5%, New Brunswick - 3.3%, Prince Edward Island - 1.7%.

(ix) Unfulfilled expectation for the combined first seven activities listed in Table S-8, or what might be termed water-based activity, was substantial.

In Nova Scotia, 51.7% of the total number of activities in which there was unfulfilled party expectation fell into this category, and the comparable values for New Brunswick and Prince Edward Island were 47.2% in each case.

The percentage values for parties that expected to participate in these activities, but did not, relative to the total number of parties that actually participated was also

high, being: Nova Scotia - 28.6%, New Brunswick - 37.1%, Prince Edward Island - 19.7%. In terms of this measurement Prince Edward Island is clearly most capable of fulfilling expectation, and New Brunswick least.

(x) Unfulfilled expectation in the case of fresh and salt water angling combined is extremely high.

By province these two activities showed the following percentages for unfulfilled expectation relative to all such listings: Nova Scotia 22.9, New Brunswick - 16.2, Prince Edward Island - 15.5.

Considering the parties that expected to participate in these activities, but did not, relative to the number of parties that actually participated, the values by provinces are: Nova Scotia - 71.0%, New Brunswick - 66.3%, Prince Edward Island - 57.0%.

(xi) Beaching and swimming considered in combination also had surprisingly high values for unfulfilled expectation. In Nova Scotia, 20.8% of all unfulfilled expectation recorded by exiting parties fell into this category. Comparable values for New Brunswick were 22.8%, and for Prince Edward Island - 22.4%.

The percentage value for the parties that expected to participate in these activities, but did not, relative to the number that actually participated was also high: - Nova Scotia - 15.7%, New Brunswick - 27.0%, Prince Edward Island - 11.8%.

(c) Some Impressions and Conclusions

(i) Caution must be exercised in any interpretation of

the results of the analysis of activity participation, expectation and realization. The response to the question by exiting parties frequently involves little more than mentions and provides no indication of the actual amount of time spent in each activity. Nevertheless, the pattern that emerges cannot be ignored.

(ii) Urban sightseeing is clearly the dominant form of activity participation. This is actually not surprising considering that a very large portion of the visitors engaged in the general landscape tour in which urban centres usually serve as an important magnet. Clearly, a large portion of visitor satisfaction is directly related to scenic and general amenity qualities of the urban landscape.

(iii) Water-based activities in general rank second in terms of activity participation. Here, beaching and swimming are the critical factors. In contrast, angling and boating are decidedly of minor importance.

The degree of unfulfilled expectation associated with water-based activities in general is higher than might be expected, and is particularly high in the case of angling. There is clear indication in this instance that the critical shoreline area of the Maritime Provinces is performing considerably below expectations as a supply input.

While causal relationships in unfulfilled shoreline expectation remain unknown, there is a distinct possibility that water temperatures and climatic conditions are a factor of considerable importance. The suggestion to the effect that the shoreline resources may not be as strong as many evaluations of supply have indicated cannot be ignored, and the consequences are of major significance in relation to tourist considerations in general and accommodation complex planning in particular.

IV. MEASURES OF INTENSITY AND FOCUS OF VISITATION AND HOLDING AND DESTINATION AREA STRENGTH BY TOURIST DISTRICTS

1. Introduction

The data presented in Table S-9 are based upon information for the Entire Season obtained from the Exit Survey of the Maritime Provinces in 1971. Two distinct measures are provided on the basis of the tourist districts in each of the three provinces. Firstly, the intensity of visitation defined in terms of person nights and rankings by region and province is shown. Secondly, the holding and destination area strength of the districts is estimated in terms of a mathematical coefficient and a class designation.

The derivation of the measures of holding and destination area strength are somewhat novel and complicated. The coefficient was determined on the basis of a maritime regional perspective. From Table C-24,^{1/} the number of parties indicating travel within the various tourist districts of the three provinces was totalled, and the percentage distribution determined. The percentage distribution of the total number of person nights spent in each tourist district in all three provinces combined is shown in Table S-9. The percentage value of the former was divided by the latter to produce the coefficient to two decimal points.

On the basis of an evaluation of the coefficients obtained six classes for holding and destination strength were established. A value in the order of 1.00 was taken to indicate neutral strength. In effect, such a district was capable of obtaining a percentage of total party nights in the region approximately equal to the percentage of the parties travelling in it.

Two areas received neutral designation with coefficients of

^{1/} Baker, W.M. - Tourist and Recreation Demand Analysis for the Maritime Provinces, prepared for DREE, December, 1972.

1.10 and 1.28. Two districts with coefficients of 2.67 and 2.87 were classed as having outstanding holding and destination area strength. Two districts with coefficients of 2.00 and 2.05 received excellent designation. Two districts, both with coefficients of 1.83, were classed as "good." Three with coefficients ranging from 1.50 to 1.67 were classed as "fair." Seven with coefficients ranging between .58 and .75 were classed as "poor." One district with a coefficient of .16 was designated as "very poor."

2. The Intensity of Visitation by Tourist Districts - Table S-9

(a) Technical Comment

The total number of person-nights and their percentage distribution by province and region is clearly shown in the table. The districts are then ranked by region and province.

(b) Salient Features

(i) New Brunswick obtained 5,621,500 person-nights or 46.4% of the regional total, Nova Scotia - 4,572,800 or 37.7%, and Prince Edward Island - 1,934,000 or 15.9%.

(ii) Within a maritime regional perspective, three districts received Rank I designation, namely, Cape Breton and the Northshore in Nova Scotia, and the East Coast in New Brunswick. Taken together the three areas accumulated 3,763,700 person-nights, or about 31% of the total for the region. Person-nights in each district range from a high of 1,298,700 in the case of Cape Breton to a low of 1,216,400 in the Northshore of Nova Scotia. The average for the group was 1,254,700 person-nights.

Table S-9

INTENSITY AND FOCUS OF VISITATION AND HOLDING AND DESTINATION
AREA STRENGTH BY TOURIST DISTRICTS

<u>Tourist Districts</u>	<u>Intensity of Visitation</u>			<u>Ranking</u>		<u>Holding & Destination Strength</u>		
	<u>Person Nights</u> (000)	<u>%</u>	<u>%</u>	<u>Region</u>	<u>Province</u>	<u>Coefficient</u>	<u>Class</u>	<u>Description</u>
<u>Nova Scotia</u>								
Halifax/Dartmouth	786.5	6.5	17.2	IV	II	1.67	IV	Fair
Cape Breton	1,298.7	10.7	28.4	I	I	2.67	I	Outstanding
Annapolis Valley	507.6	4.2	11.1	V	III	1.83	III	Good
North Shore	1,216.4	10.0	26.6	I	I	1.10	V	Neutral
South Shore	484.7	4.0	10.6	V	IV	2.00	II	Excellent
East Shore	278.9	2.3	6.1	VII	V	2.87	I	Outstanding
	4,572.8	37.7	100.0			1.71		
<u>New Brunswick</u>								
North Shore	860.1	7.1	15.3	III	III	1.58	IV	Fair
Western N.B.	1,113.1	9.2	19.8	II	II	.75	VI	Poor
Miramiche	241.7	2.0	4.3	VII	V	.80	VI	Poor
Mactaquac	590.3	4.9	10.5	V	IV	.58	VI	Poor
Grand Lake	146.1	1.2	2.6	VIII	VI	.16	VII	Very Poor
East Coast	1,248.6	10.3	22.2	I	I	.67	VI	Poor
Fundy Coast	1,158.0	9.5	20.6	II	II	.70	VI	Poor
Albert Co.	264.2	2.2	4.7	VII	V	1.83	III	Good
	5,621.5	46.4	100.0			.71		

Table S-9 (continued)

INTENSITY AND FOCUS OF VISITATION AND HOLDING AND DESTINATION
AREA STRENGTH BY TOURIST DISTRICTS

<u>Tourist Districts</u>	<u>Intensity of Visitation</u>			<u>Ranking</u>		<u>Holding & Destination Strength</u>		
	<u>Person Nights</u> (000)	<u>%</u>	<u>%</u>	<u>Region</u>	<u>Province</u>	<u>Coefficient</u>	<u>Class</u>	<u>Description</u>
<u>Prince Edward Island</u>								
West of Summerside	143.2	1.2	7.1	XIII	IV	1.50	IV	Fair
Summerside	163.2	1.3	8.4	XIII	IV	.68	VI	Poor
Between Summerside & Charlottetown	947.9	7.8	49.0	III	I	2.05	II	Excellent
Charlottetown	293.4	2.4	15.2	XII	III	.72	VI	Poor
East of Charlottetown	386.3	3.2	20.0	VI	II	1.28	V	Neutral
	1,934.0	15.9	100.0			1.26		
<u>Maritime Provinces</u>	12,128.3	100.0						

Two districts in New Brunswick received Rank II status, namely, the Western and Fundy Coast. Together they accounted for 2,271,100 person-nights, or 19% of the regional total. The average value in this case was 1,135,500 person-nights, which is approximately 90.5% of that for districts with Rank I status. These are clearly significant districts in terms of person-nights spent within the region or the province.

Two districts were accorded Rank III status, namely, the Northshore of New Brunswick and the area between Charlottetown and Summerside in Prince Edward Island. Together they tallied 1,808,000 person-nights or just under 15% of the regional total. The mean value of 904,000 person-nights was 72% of the comparable value for Rank I areas.

One district, namely, Halifax/Dartmouth in Nova Scotia, received Rank IV status, accounting for 786,500 person-nights. This was approximately 6% of the regional total and 63% of the mean person-night value for districts with Rank I status.

Three districts, including Annapolis Valley and the Southshore in Nova Scotia, together with Mactaquac in New Brunswick, received regional Rank V status. Together they accounted for 1,582,600 person-nights or about 13% of the total for the Maritime Provinces. The average value for the group was 527,500 person-nights, which was about 43% of the mean for Rank I districts.

Rank VI status was accorded only one district, namely, that portion of Prince Edward Island east of

Charlottetown - 386,300 person-nights. This was approximately 3% of the regional total and 31% of the mean value for Rank I districts.

Rank VII status was assumed by four districts, namely, the East Shore in Nova Scotia, Miramichi, and Albert County in New Brunswick, and Charlottetown in Prince Edward Island. In total, the group accounted for 1,078,200 person-nights, or 9% of the total for the maritime region. Here, person-night values ranged from a low of 241,700 to a high of 293,400. The mean person-night value for the group was 269,500, or 22% of the value for areas with Rank I status.

Three districts were accorded Rank VIII status, including Grand Lake in New Brunswick, and Summerside and the district west of Summerside in Prince Edward Island. In combination, they accounted for 452,500 person-nights or 4% of the regional total. Person-night values ranged from a low of 146,100 to a high of 163,200. The mean value of 150,800 person-nights for the group was about 12% of the comparable value for districts with Rank I status.

It is of interest to note that from a regional perspective no district in Prince Edward Island receives higher than Rank III status. Moreover, three districts of the five in this province are at the lower end of the range with Rank VII and Rank VIII status.

(iii) The provincial ranking shown in Table S-9 is clearly recognizable, and requires no comment.

(iv) The values for the coefficients for holding and

destination area strength by province are of considerable interest.

The value of 1.71 for Nova Scotia as a province is extremely close to the average of 1.70, lying mid-way between the coefficients for Class III and Class IV, designating districts with good to fair holding and destination strength. The coefficient of .71 for New Brunswick is approximately equal to the average of .70 for Class V designating districts with poor holding and destination strength. New Brunswick is undoubtedly handicapped by the fact that commuter travel and day-stay traffic are involved in the calculations, but it is clear that its relative holding and destination strength is below that of Nova Scotia. The coefficient of 1.26 for Prince Edward Island is somewhat below the mid-value of 1.39 between Class IV and Class V, indicating areas with neutral to fair holding and destination area strength. The somewhat higher value for Prince Edward Island appears reasonable.

(v) Of the nineteen districts shown in Table S-9 roughly 42% fall into Class VI and Class VII, indicating poor to very poor holding and destination area strength. New Brunswick has 71% of these districts, and Prince Edward Island - 29%. None is found in Nova Scotia.

Of the four districts displaying excellent to outstanding holding and destination area strength (Class I and Class II), three or 75% are in Nova Scotia, and one or 25% in Prince Edward Island. None is found in New Brunswick.

Of the two districts designated as "good", Nova Scotia and New Brunswick possess one each. All three provinces possess one each of the three areas designated

as fair.

(vi) Only two or 11% of the districts received Class I designation, indicating outstanding holding and destination area strength. Both are in Nova Scotia, and include Cape Breton and East Shore districts. The average value of the coefficient in this case was 2.77.

Two districts, or 11% of the total, received Class II designation, indicating excellent holding and destination area strength. Included in the group are the South Shore of Nova Scotia, and the district in Prince Edward Island between Summerside and Charlottetown. The average value of the coefficient in this case was 2.03.

Two districts, each with a coefficient of 1.83, were classed as possessing good holding and destination area strength. Included in the group are the Annapolis Valley of Nova Scotia, and Albert County in New Brunswick.

Three districts or 16%, with an average coefficient of 1.58, received Class IV status designating fair holding and destination area strength. Included in the group are Halifax/Dartmouth in Nova Scotia, the North Shore in New Brunswick, and the district west of Summerside in Prince Edward Island.

Two districts or 11%, with an average coefficient of 1.19, were recorded Class V status, designating a neutral strength. Included in the group are the North Shore in Nova Scotia, and the district east of Charlottetown in Prince Edward Island.

Seven districts, or about 37% of the total, received Class VI status, designating poor holding destination area strength. The average value of the coefficient in this case was .70. Included in the group are the Western, Miramichi, Mactaquac, East Coast and Fundy Coast in New Brunswick, and Summerside and Charlottetown in Prince Edward Island.

One district in New Brunswick, namely, Grand Lake with a coefficient of .16 was designated as Class VII, indicating very poor holding and destination area strength.

(c) Some Impressions and Conclusions

(i) The pattern previously discussed is fairly straightforward and requires little additional comment. It is important, however, to again indicate the limitations of the measurements for holding and destination strength in each of the districts. Since commuter and day visitor totals were included in the percentage value derived for parties travelling in regions, which was subsequently divided by the percentage distribution of party nights to obtain the coefficient, holding and destination area strength in relation to persons and parties on overnight and extended trips is blurred. The effect is particularly severe in the case of New Brunswick.

Holding and destination area Class and Description designation has been based upon the introduction of the concept of neutrality embodied in the coefficient value of 1.00 and the classification of the total set of coefficients derived. Class and Description associated

with any district is simply a measure of conditions relative to those prevailing throughout the nineteen districts of the Maritime Provinces.

Finally, it is important to note that the measurements of holding and destination strength for any district simply designate its ability to hold passing traffic. If passing travel is high, the volume of person and party stays may be substantial even though the holding and destination area strength is modest. The measure, therefore, is not indicative of the significance of any district in the total distribution of person and party nights. This aspect is portrayed in Table S-8.

V. MEASURES OF ACCOMMODATION USAGE

1. Introduction

The discussion is limited to party nights spent in various accommodation facility categories and types by individual provinces, and within the region. Substantial additional insight can be obtained from an examination of the tables and commentary presented in the comprehensive demand study.

2. Party Nights by Facility Category and Type - Table S-10

(a) Technical Comment

The analysis of accommodation usage is based upon data obtained from the Exit Survey of the Maritime Provinces in 1971 for the Main Season. In effect, the pattern presented is representative of the situation in the height of tourist and recreational travel.

Table S-10

PARTY NIGHTS OF ACCOMMODATION USAGE IN THE MARITIME PROVINCES IN THE MAIN SEASON RESULTING FROM
EXTRA-REGIONAL VISITATION AND RESIDENT TRAVEL ACROSS PROVINCIAL BOUNDARIES^{1/}

Party Nights Spent In	NOVA SCOTIA			NEW BRUNSWICK			PRINCE EDWARD IS.			MARITIME PROVINCES		
	(000)	%	%	(000)	%	%	(000)	%	%	(000)	%	%
A. Commercial Facilities												
1. Hotels	76.2	6.2	67	26.1	1.4	23	10.8	2.0	10	113.1	3.1	100
2. Motels	230.3	18.9	32	405.7	21.1	56	87.5	16.2	12	723.5	19.7	100
3. Tourist Homes	18.1	1.5	38	7.5	.4	16	21.9	4.0	46	47.5	1.3	100
4. Cabins	36.9	3.0	37	42.2	2.2	43	20.1	3.7	20	99.2	2.7	100
5. Housekeeping Cabins	6.9	.6	20	4.4	.3	13	22.8	4.2	67	34.1	1.0	100
6. Rented Cottage or Vacation Home	14.2	1.2	14	74.0	3.9	73	13.8	2.6	13	102.0	2.8	100
7. Hunting & Fishing Camps	1.1	-	12	6.6	.3	73	1.3	.2	15	9.0	-	100
Total 1 - 7	383.7	31.4	34	566.5	29.5	50	178.2	32.9	16	1,128.4	30.6	100
8. Campgrounds	199.7	16.4	50	92.1	4.8	23	105.8	19.6	27	397.6	10.8	100
Total A	583.4	47.8	38	658.6	34.3	43	284.0	52.5	19	1,526.0	41.4	100
B. Public Facilities												
1. National Park Campgrounds	83.9	6.9	46	61.3	3.2	33	38.8	7.2	21	184.0	5.0	100
2. Provincial Park Campgrounds	79.7	6.5	37	101.5	5.3	47	35.3	6.5	16	216.5	5.9	100
Total B	163.6	13.4	41	162.8	8.5	41	74.1	13.7	18	400.5	10.9	100
C. Personal Facilities												
1. Home Friends & Relatives	370.3	30.3	28	833.9	43.4	62	138.8	25.7	10	1,343.0	36.5	100
2. Own or Friend's Cottage	66.6	5.5	31	118.2	6.2	56	27.6	5.1	13	212.4	5.8	100
Total C	436.9	35.8	28	952.1	49.6	61	166.4	30.8	11	1,555.4	42.3	100
D. Other	35.9	3.0	18	146.0	7.6	74	16.3	3.0	8	198.2	5.4	100
Total A to D	1,219.8	100.0	33	1,919.5	100.0	52	540.8	100.0	15	3,680.1	100.0	100

^{1/} Based on Tables C-35, C-36 & C-37, that in turn are based on Exit Survey of Maritime Provinces, Summer 1971

Accommodation usage is grouped under four main facility categories, including commercial, public, personal and other. Under commercial facilities the full range of accommodation types provided by private enterprise are shown. The campgrounds available in National and Provincial Park developments are grouped under public facilities. Personal facilities include the homes of friends and relative, and privately-owned cottages. The category "Other" includes boats, automobiles and any other facility not previously listed.

(b) Salient Features

(i) Of a total of just over 3.6 million party nights spent in the Maritime Provinces during the Main Season of 1971, Nova Scotia received 1.2 million or 33%, New Brunswick - 1.9 million or 52%, Prince Edward Island - just over .5 million or 15%.

The aforementioned percentage value for Prince Edward Island is about 114% greater than the proportionate value of 7% for its population relative to that of the Maritime Provinces. That for Nova Scotia is roughly similar to the percentage value for its population - 52. Interestingly, that for New Brunswick is only 75% of the percentage value for its population within a regional context - 42%.

(ii) Within the Maritime Provinces 1,526,000 party nights were spent in commercial facilities. The division by province was as follows: Nova Scotia - 583,400 - 38%, New Brunswick - 658,600 - 43%, Prince Edward Island - 284,000 - 19%.

About 41.4% of the party nights for the region were spent in commercial accommodation. The highest value

for commercial facilities was recorded in Prince Edward Island - 52.5%, and the lowest in New Brunswick - 34.3%. The value for Nova Scotia was 47.8%.

(iii) Among the commercial facilities, motels dominated, accounting for 723,500 party nights in the region. The division by province was as follows: Nova Scotia - 230,300 - 32%, New Brunswick - 405,700 - 56%, Prince Edward Island - 87,500 - 12%.

Approximately 19.7% of all party nights in the region were spent in motels. Comparable values for the provinces were: Nova Scotia - 18.9%, New Brunswick - 21.1%, Prince Edward Island - 16.2%.

From Table S-16 (see VII: 2. (a)), the accommodation capacity in motels as a percentage of that in hotels, motels, tourist homes and cabins can be determined by province and region. The values are:- Maritime Provinces - 34.0%; Nova Scotia - 42.5%, New Brunswick - 49.3%, Prince Edward Island - 27.9%. If the number of party nights in the first five commercial facilities listed in Table S-10 (hotels, motels, tourist homes, cabins and housekeeping cabins) is totalled and the percentage values determined for motels, were as follows:- Maritime Provinces - 71.1, Nova Scotia - 62.5, New Brunswick - 83.5, Prince Edward Island - 53.7. A comparison of the two percentage sets further emphasizes the dominance of motels among the group of commercial accommodation facilities.

(iv) Commercial campgrounds were clearly the second most important commercial accommodation facility, accounting for 397,600 party nights within the Maritime

Provinces. The division by province was:- Nova Scotia - 199,700 - 50%, New Brunswick - 92,100 - 23%, Prince Edward Island - 105,800 - 27%.

About 10.8% of all party nights spent within the Maritime Provinces accrued to commercial campgrounds. Corresponding values by province were: - Nova Scotia - 16.4%, New Brunswick - 4.8%, Prince Edward Island - 19.6%. Campgrounds are clearly of least significance in New Brunswick in both an absolute and proportional sense.

(v) Hotels ranked third among the commercial facilities, but far behind motels and commercial campgrounds. Within the Maritime Provinces, 113,100 party nights were spent in hotels. Of these, Nova Scotia accounted for 76,200 - 67%, New Brunswick - 26,100 - 23%, Prince Edward Island - 10,800 - 10%.

About 3.1% of the party nights in the Maritime Provinces were spent in hotels. In this proportionate sense hotels were strongest in Nova Scotia, where the value was 6.2%. Corresponding values for New Brunswick and Prince Edward Island were markedly lower being 1.4% and 2.0% respectively.

Calculations based on Table S-16, similar to those noted under point (iii) show that 59.2% of the total room capacity in the Maritime Provinces is associated with hotels. Corresponding percentage values for the individual provinces were: Nova Scotia - 32.9%, New Brunswick - 38.9%, Prince Edward Island - 19.9%. Again, considering only the first five commercial facilities listed in Table S-10, only 11.1%

of the party nights were spent in hotels within the Maritime Provinces. Comparable values for the provinces were: Nova Scotia - 20.7%, New Brunswick - 5.4%, Prince Edward Island - 6.6%. Hotels appear to be somewhat more significant in Nova Scotia in this proportional sense, but in general their position is weak compared with motels.

(vi) Personal facilities accounted for 1,555,400 of the party nights in the Maritime Provinces. Of this amount, Nova Scotia obtained 436,900 or 28%, New Brunswick - 952,100 or 61%, Prince Edward Island - 166,400 or 11%.

About 42.3% of the party nights in the Maritime Provinces were spent in personal facilities. Corresponding values for the provinces were: Nova Scotia - 35.8%, New Brunswick - 49.6%, Prince Edward Island - 30.8%.

Among the personal facilities the homes of friends and relatives were the most significant. Actually, they were the leading individual facility type as shown in Table S-10. Within the Maritime Provinces 36.5% of all accommodation nights were spent in the homes of friends and relatives, and the corresponding values for the provinces were: Nova Scotia - 30.3%, New Brunswick - 43.4%, Prince Edward Island - 25.7%.

Within the region total party nights spent in the homes of friends and relatives were 88% of those spent in all commercial facilities, including campgrounds. Corresponding values in Nova Scotia and Prince Edward Island were 63% and 49% respectively. In New Brunswick party nights spent in these facilities were 26%

greater than those spent in all commercial facilities. Party nights spent in the homes of friends and relatives in the region were about 19% greater than those listed in Table S-10 under commercial facilities exclusive of campgrounds. In New Brunswick, they were a startling 47% greater. In Nova Scotia, the corresponding value was 96%, and that for Prince Edward Island - 78%.

(vii) Within a maritime regional context, national and provincial campgrounds accounted for 400,500 party nights. The division by province was: Nova Scotia - 163,600 - 41%, New Brunswick - 162,800 - 41%, Prince Edward Island - 74,100 - 18%.

About 10.9% of the party nights in the Maritime Provinces were spent in these facilities. Proportionately, they were most significant in Prince Edward Island 13.7%, and Nova Scotia - 13.4%, and least in New Brunswick - 8.5%.

Within the region, provincial campgrounds were slightly more significant than national, accounting for 54% of all party nights spent in public facilities. In New Brunswick, they accounted for 62%. In Nova Scotia and Prince Edward Island, however, values were 49% and 48% respectively, indicating a slightly more prominent role for national parks.

(vii) It is of interest to compare party nights spent in private campgrounds with those in the national and provincial park campsites.

About 798,100 party nights were spent in both public and private campsites throughout the region. Nova

Scotia accounted for 361,300 or 45%, New Brunswick - 254,900 or 32%, Prince Edward Island - 179,900 or 23%.

Within the region, public and private campsites accounted for 21.8% of all party nights. Corresponding values for the provinces were: Nova Scotia - 29.8%, Prince Edward Island - 33.3%, but New Brunswick only 13.3%.

Within the region, about 50% of the campground party nights were spent in private facilities, and 50% in those of the national and provincial parks combined. Corresponding values by province were: Nova Scotia--private - 55%, national and provincial - 45%; Prince Edward Island--private - 59%, national and provincial - 41%; New Brunswick--private - 36%, national and provincial - 64%. In New Brunswick, the pattern is reversed with public facilities clearly dominating.

(viii) Personal cottages and those of friends accounted for 212,400 party nights within the Maritime Provinces. The distribution by province was: Nova Scotia - 66,000 - 31%, New Brunswick - 118,200 - 56%, Prince Edward Island - 27,600 - 13%.

Within the region, about 5.8% of the party nights were spent in these facilities. Corresponding values by province are close to the value for the region, being: Nova Scotia - 5.5%, New Brunswick - 6.2%, Prince Edward Island - 5.1%.

(c) Some Impressions and Conclusions

(i) The position of commercial facilities, exclusive of campgrounds, is not particularly strong in a comparative sense. In

the region they accounted for only 31% of the party nights, and a similar proportion in Nova Scotia. The corresponding value for New Brunswick is 29%, and that for Prince Edward Island, the highest of the group - 33%.

Proportionately the position of commercial accommodation is strongest in Prince Edward Island, where there is close to an even percentage division among the major facility categories: commercial - 33%, camping - 33%, personal - 31%. It is weakest in New Brunswick where the values are: commercial - 29%, camping - 13%, personal - 50%. The position in Nova Scotia was about mid-way between that of New Brunswick and Prince Edward Island where the percentage division for party nights is: commercial - 31%, camping - 30%, personal - 36%.

(ii) campground facilities, for which there is modest profit in the private sector at best and an overall loss position in the public, accounted for 22% of the party nights in the maritime region. They reached a high of 33% in Prince Edward Island, but a low of 13% in New Brunswick. The value for Nova Scotia is 30%. Clearly, New Brunswick is in an anomalous position with respect to party nights in public and private campsites.

(iii) Personal facilities, particularly accommodation in the homes of friends and relatives, are of major consequence accounting for 42% of the party nights in the region. This form of accommodation reaches a high in New Brunswick with a value of 50%, and a low in Prince Edward Island - 31%. In Nova Scotia, 36% of the party nights were spent in personal facilities.

VI. MEASURES OF THE ECONOMIC SIGNIFICANCE OF TRAVEL IN
THE MARITIME PROVINCES IN 1971 - TRAVELLER EXPENDITURES,
HOUSEHOLD INCOME AND EMPLOYMENT IMPACT

1. Introduction

Initially travel expenditure patterns at final demand point are summarized. Table S-11 represents a recapitulation of expenditures during the Entire Summer Season by major categories of origin, including extra-regional visitation, inter-resident provincial movement and internal provincial resident travel. Here, data obtained from the Exit Survey of the Maritime Provinces in 1971 are combined with estimates of overseas visitation and travel by maritime residents to destinations within provincial boundaries. In Table S-12 expenditures generated by extra-regional visitors and inter-provincial resident travel in the Main and Entire Seasons are indicated. The seasonality aspect is highlighted on the basis of the results obtained from the Exit Survey of 1971. Table S-13 summarizes data from the aforementioned survey related to the division of expenditures by commodity categories, and in terms of volume totals and mean daily party and person outlay.

In Table S-14 direct and total household income impact from travel expenditures in the Entire Season is summarized, again, in terms of major origin categories similar to those utilized in Table S-11. Income impact derived from the results of the Exit Survey of the Maritime Provinces can be readily distinguished from that related to overseas travel and internal provincial resident activity.

In Table S-15 direct and total employment impact from traveller expenditures during the Entire Season of 1971 is indicated by major categories of travel origin. Again, it is possible to disassociate the quantities obtained from the results of the Exit Survey of 1971 from those associated with overseas visitors and internal provincial resident activity.

2. Total Travel Expenditure in the Entire Summer Season -
Table S-11

(a) Technical Comment

This table includes expenditures for the Entire Summer Season (May 15th to October 31st), and encompasses all purposes of travel. It is estimated that over 90% of the expenditure was associated with automobile trips. All values shown for extra-regional Canadian and American visitors, and resident inter-provincial travellers are related to automobile travel with the exception of 9,000 plane and bus parties exiting Prince Edward Island. Between 80 and 85 percent of the expenditures of resident travellers to destinations within their province involved automobile transport. Visitors from overseas came essentially by air.

Only minor expenditures incurred for the purchase of consumable goods and services, handicrafts and souvenirs are included. Major expenditures incurred for the acquisition of capital assets, such as cottage properties or pleasure boats are excluded.

(b) Salient Features

(i) Expenditures in the Maritime Provinces stemming from all sources of travel in the Entire Summer Season of 1971 totalled \$161.1 million. Nova Scotia accounted for \$73.2 million or 45.4%, New Brunswick - \$69.6 million - 43.2%, Prince Edward Island - \$18.3 million - 11.4%. Per capita values are as follows:- Nova Scotia - \$95.04, New Brunswick - \$110.74, Prince Edward Island - \$164.90; Maritime Provinces - \$106.72.

TRAVEL EXPENDITURES IN THE MARITIME PROVINCES DURING THE ENTIRE SUMMER SEASON
(May 15 to October 31), 1971

Table S-11

	NOVA SCOTIA			NEW BRUNSWICK			PRINCE EDWARD ISLAND			MARITIME PROVINCES		
	\$(000)	%	%	\$(000)	%	%	\$(000)	%	%	\$(000)	%	%
A. All Types of Minor Expenditures^{1/}												
I. From Extra-Regional & Resident Intra-Provincial Travel												
1. Overseas Visitors ^{2/}	1,136	1.6	51.4	911	1.3	41.3	160	.9	7.3	2,207	1.4	100.0
2. Extra-Regional Canadian and American Visitors and Resident ^{3/} Intra-Provincial Travellers	40,929	55.9	40.1	46,276	66.4	45.3	14,917	81.5	14.6	102,122	63.3	100.0
Total 1 and 2	42,065	57.5	40.3	47,187	67.7	45.2	15,077	82.4	14.5	104,329	64.7	100.0
II. From Internal Provincial Resident Travel^{4/}												
	31,119	42.5	54.8	22,467	32.3	39.5	3,227	17.6	5.7	56,813	35.3	100.0
Total A	73,184	100.0	45.4	69,654	100.0	43.2	18,304	100.0	11.4	161,142	100.0	100.0
B. Expenditures on Commercial Accommodation												
1. From Extra-Regional Canadian and American Visitors and Resident Intra-Provincial Travellers ^{3/}	10,700	64.8	44.4	9,546	77.6	39.6	3,861	88.6	16.0	24,107	72.7	100.0
2. From Internal Provincial Travel ^{4/}	5,813	35.2	64.1	2,752	22.4	30.4	498	11.4	5.5	9,063	27.3	100.0
Total B	16,513	100.0	49.8	12,298	100.0	37.1	4,359	100.0	13.1	33,170	100.0	

^{1/} Minor expenditures are those incurred for consumable goods and services (generally under \$200) as opposed to those associated with the purchase of capital goods, such as cottage properties.

^{2/} Data from Table A-7 and includes expenditures for 12 months by direct and indirect entries.

^{3/} Data from Table C-45, and based on the 1971 Exit Survey of the Maritime Provinces.

^{4/} Data from Table C-52. It was assumed that 85% of the expenditures shown in table were made in the time period that corresponds to Exit Survey.

(ii) Overseas visitation is of extremely modest consequence in the expenditure pattern, accounting for only \$2.2 million or 1.4% of the regional total. Provincial percentage values range from a low of .9 in Prince Edward Island to a high of 1.6 in Nova Scotia.

(iii) Internal provincial resident travel is a very significant factor on either a regional or provincial basis. It accounted for \$56.8 million within the region, or 35.3% of the total. Comparable provincial values were: Nova Scotia - \$31.1 million - 42.5%, New Brunswick - \$22.5 million - 32.3%, Prince Edward Island - \$3.2 million - 17.6%. The proportional division by province of the regional expenditure totalling \$56.8 million was as follows: Nova Scotia - 54.8%, New Brunswick - 39.5% - Prince Edward Island - 5.7%. Expenditures per capita by provinces were: Nova Scotia - \$40.41, New Brunswick - \$35.72, Prince Edward Island - \$29.07.

(iv) Extra-regional Canadian and American visitation combined with inter-provincial travel, which was the scope of the universe encompassed by the Exit Survey of the Maritime Provinces in 1971, was the dominant factor on either a regional or provincial basis. It accounted for \$102.1 million in expenditure within the Maritime Provinces, or 63.3% of the total. Comparable values for the provinces were: Nova Scotia - \$40.9 million - 55.9%, New Brunswick - \$46.3 million - 66.4%, Prince Edward Island - \$14.9 million - 81.5%. The proportional division of the \$102.1 million among the provinces was as follows: Nova Scotia - 40.1%, New Brunswick - 45.3%, Prince Edward Island - 14.6%. Per capita value by province were as follows: Nova Scotia - \$53.15, New Brunswick - \$73.57, Prince Edward Island - \$134.39.

(c) Some Impressions and Conclusions

(i) Overseas visitor expenditure is modest, and is expected to remain so in the foreseeable future. While volume growth is expected, a substantial increase proportionate to other visitor categories is unlikely.

(ii) Resident travel to destinations within provincial boundaries is of major consequence in the overall expenditure pattern, and must be given consideration in policy and program formulation for tourist and recreational development unless regional economic development is tied to the export theory of growth.

(iii) Expenditure information is inadequate for policy and program planning of the type that now confronts the Department of Regional Economic Expansion. Firm data are required on all-year basis and in relation to all sources and modes of transport.

3. Seasonality of Expenditure Generated by Extra-Regional Visitation and Inter-provincial Resident Travel in 1971 - Table S-12

(a) Technical Comment

The table is based entirely upon results obtained from the Exit Survey of 1971. Commuter travel has been removed from consideration. The Entire Season covers the period May 15th to October 31st, the Main Season encompasses the high summer season from June 15th to September 15th, and the Extended Seasons include both time spans of May 15th to June 14th and September 16th to October 31st. The latter are often termed the spring-and-fall shoulder seasons.

Table S-12 DIVISION OF TRAVEL EXPENDITURES GENERATED BY EXTRA-REGIONAL VISITORS AND INTRA-PROVINCIAL RESIDENT TRAVEL IN THE MAIN AND ENTIRE SEASONS 1971^{1/}

	NOVA SCOTIA			NEW BRUNSWICK			PRINCE EDWARD IS.			MARITIME PROVINCES		
	\$(000)	%	%	\$(000)	%	%	\$(000)	%	%	\$(000)	%	%
<u>All Expenditures</u>												
Main Season ^{3/}	30,049	74	36	40,016	90	49	12,627	87	15	82,692	83	100
Extended Seasons	10,488	26	61	4,495	10	26	2,275	13	13	17,258	17	100
Entire Season ^{2/}	40,537	100	40	44,511	100	45	14,902	100	15	99,950	100	100
<u>Accommodation Expenditures</u>												
Main Season ^{3/}	10,593	99		9,164	96		3,853	99		23,610	98	
Extended Season	107	21		382	77		8	2		497	100	
Entire Season ^{4/}	10,700	100		9,546	100		3,861	100		24,107	100	

^{1/} Covers the period May 15 to October 31 1971, and excludes expenditures by commuters staying less than 24 hours. Expenditures for commuters were determined by multiplying commuter parties, shown in Table C-46, by average per party expenditure for all parties - a procedure that probably leads to slight error.

^{2/} Data directly from Table C-45.

^{3/} Data directly from Table C-46, and does not include commuter expenditures. Covers the period May 31st to September 15th.

^{4/} Data taken directly from Table C-46 and includes commuter expenditures when stays of one or more nights were involved.

(b) Salient Features

(i) Within the maritime region, Main Season expenditures totalled \$82.7 million, which is 83% of those for the Entire Season. Comparable values for the provinces were: Nova Scotia--\$30.0 million - 74%, New Brunswick --\$40.0 million - 90%, Prince Edward Island--\$12.6 million - 87%. The proportionate division of Main Season expenditures by province was as follows: Nova Scotia - 36%, New Brunswick - 49%, Prince Edward Island - 15%.

(ii) Expenditures during the Extended or spring-and-fall should Seasons totalled \$17.3 million, which is 17% of those for the Entire Season. Comparable values by province were: Nova Scotia--\$10.5 million - 26%, New Brunswick--\$4.5 million - 10%, Prince Edward Island--\$2.3 million - 13%. The proportional division of expenditures during the Extended Season was: Nova Scotia - 61%, New Brunswick - 26%, Prince Edward Island - 13%.

(c) Some Impressions and Conclusions

(i) The dominance of the Main Season has been a persistent feature over the years.

(ii) There will be growth in volume expenditure during the Extended Season, but no significant change in its proportionate strength is envisaged due to underlying supply and demand forces.

(iii) Demand prospects for a substantive increase in the bus-package tour in the Extended Season look reasonably good. Winter ski development will not alter the seasonality pattern in an overall sense.

4. Expenditure by Commodity Type during the Entire Season - Table S-13

(a) Technical Comment

Data presented in Table S-13 rests entirely upon an analysis of information obtained in the Exit Survey of the Maritime Provinces of 1971. Expenditures include those incurred on trips motivated by all purposes of travel in the Entire Season.

The patterns of total and mean trips, and daily party and person expenditures are clearly revealed. However, commentary will be restricted to the outlay for commercial accommodation, and information contained in Tables S-11 & S-12 will be introduced at appropriate points.

(b) Salient Features

(i) Table S-11 indicates an expenditure of \$33.2 million for commercial accommodation in the Maritime Provinces during the Entire Season. About \$24.1 million or 72% was incurred by extra-regional visitors, and residents of the Maritime Provinces engaged in inter-provincial travel. Resident travel within provincial boundaries accounted for the remaining \$9.1 million or 18.3%. The division of the \$33.2 million in expenditures by individual provinces was as follows: Nova Scotia--\$16.5 million - 50%, New Brunswick--\$12.3 million - 37%, Prince Edward Island--\$4.4 million - 13%.

(ii) The \$9.1 million in expenditure for commercial accommodation, generated by resident travel to destinations within provincial boundaries, was shared by the individual provinces as follows: Nova Scotia--\$5.8 million - 64%, New Brunswick--\$2.8 million - 30%, Prince Edward Island--\$.5 million - 6%.

	N O V A S C O T I A						N E W B R U N S W I C K							
	Absolute ^{2/}		Adjusted ^{3/}	Mean Trip \$ ^{4/}		Mean Daily \$ ^{4/}		Absolute ^{2/}		Adjusted ^{3/}	Mean Trip \$ ^{4/}		Mean Daily \$ ^{4/}	
	\$ 10 ³	%		Party	Person	Party	Person	\$ 10 ³	%		\$ 10 ³	Party	Person	Party
I. Total Expenditures														
Major Expenditures	4,755	10.4		11.03	5.49	8.96	5.27	6,755	12.7					
Minor Expenditures	40,929	89.6		94.95	34.45	19.33	7.05	46,267	87.3		33.18	14.50	18.32	8.05
Total I	45,684	100.0		105.98	39.94	28.29	12.32	53,022	100.0					
II. Expenditure by Commodity Category														
1. Gas & Oil	7,459	18.2	7,462	17.3	7.08	5.45	2.32	10,511	22.7	10,498	7.54	3.37	4.45	1.98
2. Auto Repairs	738	1.8	738	1.71	.77	.48	.25	1,270	2.7	1,268	.91	.44	.45	.23
Total Car 1 & 2	8,197	20.0	8,200	18.42	7.85	5.93	2.57	11,781	25.4	11,766	8.45	3.71	4.90	2.21
3. Food & Beverage Purchase	3,886	9.5	3,890	9.02	3.25	2.35	.89	5,448	11.7	5,441	3.91	1.52	1.62	.65
4. Restaurant Food & Beverage	10,369	25.3	10,371	24.06	10.39	7.31	3.21	10,559	22.9	10,545	7.57	3.47	4.58	2.05
Total Food & Beverage 3 & 4	14,255	34.8	14,261	33.08	13.64	9.66	4.10	16,007	34.6	15,986	11.48	4.99	6.20	2.70
5. Accommodation	10,695	26.2	10,700	24.81	11.01	6.84	3.04	9,558	20.6	9,546	6.85	3.00	3.82	1.67
6. Recreation & Entertainment	1,890	4.6	1,891	4.39	1.68	.93	.40	3,181	6.9	3,177	2.82	1.00	.72	.34
7. Handicrafts & Merchandise	4,161	10.2	4,163	9.65	3.98	2.95	1.27	4,116	8.9	4,111	2.95	1.17	1.68	.68
8. Other Items	1,713	4.2	1,714	3.98	1.75	1.98	.94	1,683	3.6	1,681	1.21	.57	1.00	.50
Total II	40,911	100.0	40,929	94.29	39.91	28.29	12.32	46,326	100.0	46,267	33.76	14.44	18.32	8.10

(continued)

	P R I N C E E D W A R D I S L A N D ^{5/}						M A R I T I M E P R O V I N C E S			
	Absolute ^{2/}		Adjusted ^{3/} \$ 10 ³	Mean Trip \$ ^{4/}		Mean Daily \$ ^{4/}		Absolute \$ 10 ³	%	Adjusted \$ 10 ³
	\$ 10 ³	%		Party	Person	Party	Person			
Total Expenditures										
Major Expenditures	658	4.2		3.99	1.83	.67	.39	12,168	9.6	
Minor Expenditures	14,917	95.8		90.46	35.56	30.17	12.59	114,281	90.4	
Total I	15,575	100.0		94.45	37.39	30.84	12.98	126,449	100.0	
<u>Expenditures by Com-</u>										
<u>modity Category</u>										
1. Gas & Oil	1,985	13.3	1,981	12.04	5.06	4.27	1.86	19,955	19.5	19,941
2. Auto Repairs	267	1.8	266	1.62	.89	.44	.23	2,275	2.2	2,272
Total Car 1&2	2,252	15.1	2,247	13.66	5.95	4.71	2.09	22,230	21.7	22,213
3. Food & Beverage Purchase	2,289	15.3	2,284	13.88	4.81	3.39	1.20	11,623	11.4	11,615
4. Restaurant Food & Beverage	2,954	19.8	2,947	17.91	7.87	7.00	3.03	23,882	23.4	23,863
Total Food & Beverage 3 & 4	5,243	35.1	5,231	31.79	12.68	10.39	4.23	35,505	34.8	35,478
5. Accommodation	3,870	25.8	3,861	23.47	9.71	7.51	3.19	24,123	23.6	24,107
6. Recreation & Entertainment	1,361	9.1	1,358	8.25	3.39	2.44	.98	6,432	6.3	6,426
7. Handicrafts & Merchandise	1,162	7.8	1,159	7.04	2.78	2.63	1.03	9,439	9.2	9,433
8. Other Items	1,063	7.1	1,061	6.45	2.98	3.16	1.46	4,459	4.4	4,456
Total II	14,951	100.0	14,917	90.66	37.49	30.84	12.98	102,188	100.0	102,113

^{1/} Source Ibid. - Represents expenditures by 431,000 parties in Nova Scotia, 1,394,300 in New Brunswick and 164,900 in Prince Edward Island.

^{2/} Values taken directly from the printouts.

^{3/} Values for Expenditure by Category adjusted to equal total for minor expenditures.

^{4/} The total of mean values by expenditure category does not always equal that shown under Minor Expenditures because values were derived from a somewhat different set of observations. The mean party trip values by expenditure category are related to minor expenditures. In all other cases the means are related to or include both Major and Minor Expenditures.

^{5/} Includes travellers by air and bus as well as automobile.

(iii) While the information contained in Table S-12 with respect to expenditures for commercial accommodation use probably underestimates outlays in the Extended Season, it is clear nevertheless that the bulk of the outlay occurred in the Main Season. Moreover, there is a strong suggestion that the proportionate share for commercial accommodation during the Extended Seasons in relation to the total expenditures is somewhat less.

(iv) From Table S-13, it will be seen that expenditures for commercial accommodation incurred by extra-regional visitors and inter-provincial resident travellers during the Entire Season totalled \$24.1 million. This was about 23.6% of expenditures of all types.

The shares obtained by the individual provinces were as follows: Nova Scotia--\$10.7 million - 44%, New Brunswick--\$9.5 million - 40%, Prince Edward Island--\$3.9 million - 16%.

(c) Some Impressions and Conclusions

(i) While there will be growth in the absolute dollar-value of the expenditures in the years ahead, it is likely that the seasonal proportions will remain roughly similar. Insofar as can be gathered from various sources of information, the pattern has not changed appreciably over the past six years.

5. Direct and Total Household Income Impact - Table S-14

(a) Technical Comment

The direct and total income impact of expenditures by

Table S-14

DIRECT AND TOTAL HOUSEHOLD INCOME IMPACT FROM TRAVEL EXPENDITURES - IN THE MARITIME PROVINCES IN THE ENTIRE SUMMER SEASON 1971

EXCLUSIVE OF GOVERNMENT CREATED REVENUE AND ITS EFFECTS

	<u>NOVA SCOTIA</u>			<u>NEW BRUNSWICK</u>			<u>PRINCE EDWARD ISLAND</u>			<u>MARITIME PROVINCES</u>		
	<u>\$(000)</u>	<u>%</u>	<u>%</u>	<u>\$(000)</u>	<u>%</u>	<u>%</u>	<u>\$(000)</u>	<u>%</u>	<u>%</u>	<u>\$(000)</u>	<u>%</u>	<u>%</u>
I <u>Direct Household Income</u> <u>Created Expenditures by:</u>												
(1) Overseas Travellers <u>1/</u>	561	1.5	49.6	491	1.2	43.4	79	.9	7.0	1,131	1.3	100.0
(2) Extra-Regional Canadian & American and Resident <u>2/</u> Intra-Provincial Travellers	22,543	58.6	38.4	28,563	69.4	48.6	7,675	82.1	13.0	58,781	66.1	100.0
(3) Internal Prov. Resident Travellers <u>3/</u>	15,362	39.9	52.9	12,103	29.4	41.6	1,590	17.0	5.5	29,055	32.6	100.0
Total	38,466	100.0	43.2	41,157	100.0	46.3	9,344	100.0	10.5	88,967	100.0	100.0
II <u>Indirect and Induced Income</u> <u>Created by Expenditures by:</u>												
(1) Overseas Travellers <u>1/</u>	633	1.5	46.4	650	1.2	47.7	81	.8	5.9	1,364	1.3	100.0
(2) Extra-Regional Canadian & Intra-Provincial Res. Travel- lers <u>2/</u>	25,443	58.6	35.7	37,863	69.4	53.2	7,923	82.2	11.1	71,229	66.2	100.0
(3) Internal Provincial Resident Travellers <u>3/</u>	17,341	39.9	49.5	16,037	39.4	45.8	1,640	17.0	4.7	35,018	32.5	100.0
Total	43,417	100.0	40.3	54,550	100.0	50.7	9,644	100.0	9.0	107,611	100.0	100.0
III <u>Total Household Income</u> <u>Created by Expenditures by:</u>												
(1) Overseas Travellers <u>1/</u>	1,194	1.5	47.9	1,141	1.2	45.7	160	.8	6.4	2,495	1.3	100.0
(2) Extra-Regional Canadian & American and Resident Intra-Provincial Travellers	47,986	58.6	36.9	66,426	69.4	51.1	15,598	82.2	12.0	130,000	66.1	100.0
(3) Internal Prov. Resident Travellers	32,703	39.9	51.0	28,140	29.4	43.9	3,230	17.0	5.1	64,073	32.6	100.0
Total	81,833	100.0	41.6	95,707	100.0	48.7	18,988	100.0	9.7	196,578	100.0	100.0

(footnotes on following page)

FOOTNOTES TABLE S-14

- 1/ Assumes all expenditures by overseas travellers were made in the Entire Season of the 1971 Exit Survey, and that impact effects were similar to those generated by expenditures revealed in this study, (Table C-50).
- 2/ Values taken directly from Table C-50.
- 3/ Assumes 85% of expenditures were made in the Entire Season of the 1971 Exit Survey and that impact effects are similar.

extra-regional visitors and resident inter-provincial travellers, revealed in the Exit Survey of the Maritime Provinces in 1971, were obtained from special studies completed for each province. It was assumed that the impact of expenditures by overseas travellers and those generated by internal provincial resident travel would be similar. The income created coefficients of expenditure shown in Table C-50,^{1/} therefore were applied to total expenditures for these groups indicated in Table S-11 to provide total household income created. This procedure may have resulted in some error. Direct income and indirect and induced income were derived using percentage values revealed in Table C-50.

Direct income includes salaries, wages, tips, profits and rents accruing to the suppliers of goods and services at final demand point. Total income includes direct income, indirect income created by the purchase of finished goods and services used in the production process at final demand point, and induced income resulting from the re-spending of direct and indirect incomes.

(b) Salient Features

(i) Total household income impact in the Maritime Provinces during the Entire Season totalled \$196.6 million. Approximately \$2.5 million or just over 1% was generated by the expenditure of overseas visitors, \$64.1 million or 33% by internal provincial resident travel, and \$130.0 million or 66% by extra-regional Canadian and American visitation together with resident inter-provincial movement.

^{1/} Baker, W.M. - Tourist and Recreation Demand Analysis for the Maritime Provinces - Part Two, Section C., prepared for the Department of Regional Economic Expansion, Ottawa, December, 1972.

About \$89.0 million or 45% represented direct income, and \$107.6 million or 65% indirect and induced income.

The division of the \$196.6 million in total household income by provinces was as follows: Nova Scotia--\$81.9 million - 42%, New Brunswick--\$95.7 million - 49%, Prince Edward Island--\$19.0 million - 10%.

(ii) Direct income in the maritime region totalled \$89.0 million. The division by provinces was as follows: Nova Scotia--\$38.5 million - 43%, New Brunswick--\$41.2 million - 46%, Prince Edward Island--\$9.3 million - 11%.

Within the region, about 55.2% of consumer expenditure at final demand point became direct income. Corresponding values for the provinces were: Nova Scotia-- 52.6%, New Brunswick - 59.0%, Prince Edward Island - 51.0%.

(iii) The indirect and induced income for the Maritime Provinces totalled \$107.6 million.

The division of the regional total by province was as follows: Nova Scotia--\$43.4 million - 40%, New Brunswick--\$54.6 million - 51%, Prince Edward Island--\$9.6 million - 9%.

(c) Some Impressions and Conclusions

(i) The values presented in Table S-14 are of considerable significance. Moreover, their effective use is

enhanced when they are considered in combination with similar values for other sectors of the economy. On the other hand, they possess serious limitations in relation to detailed policy and program planning for the tourist and recreational sector.

In the all-important area of direct income, no indication is provided of the range and division of salaries and incomes by labour and management categories. On the basis of limited information available, it appears that wage payments and returns to management and ownership, particularly in the smaller enterprises, are decidedly low when compared with many other sectors of the economy. This is especially true in non-urban areas, where the industry is characterized by a high degree of seasonality. Indeed, the planner is confronted with the prospect that government stimulation of this sector of the economy may be encouraging movement into a field of low remuneration.

It is clear that a great deal more information is required with respect to income patterns in the private sector of the tourist and recreational industry. A series of studies for the former Atlantic Development Board provided a detailed summation of wage and salary payments in the public sector in 1966, but this information has not been run in the input-output model to determine impact. ^{1/}

(ii) The income pattern for the tourist and recreation

^{1/} Baker, W. M. - Expenditures in the Atlantic Provinces by Federal Government Agencies Related to Tourism and Recreation for the Fiscal Years 1966-1967 to 1974-1975, prepared for the Dept. of Regional Economic Expansion, Ottawa, October, 1969.
 Baker, W. M. - Employment in the Atlantic Provinces Resulting from Provincial Operating Expenditures for Tourism and Recreation, 1966-67 to 1971-72, prepared for the Atlantic Development Board, Ottawa, December, 1967.

sector of the Maritime Provinces can be conveniently grouped into two main types, namely, primarily single source, and primarily multiple source. In the former, income is obtained essentially from a single source, such as a salaried or wage-paying job, or a return to the ownership and management of a service or facility. In the latter, income is derived from two or more sources, either on a seasonal or an all-year basis. This latter income category is characteristic of many of the non-urban areas in the Maritime Provinces, and is increasingly encountered in urban areas.

There is nothing inherently wrong with the multiple source pattern. Indeed, those who have become accustomed to it, often display a preference for it on the basis that it offers variety in the total work experience. Many actually experience a degree of monotony from a single income source. All that is necessary is that the multiple source income be sufficient in total.

In future policy and program planning related to tourism and recreation in the Maritime Provinces and the design of research projects related to employment, it is essential that the multiple and single source income be adequately recognized. Failure to do so can only lead to unrealistic appraisals of the significance of the sector as an income generator.

6. Direct and Total Employment Impact Table S-15

(a) Technical Comment

Procedure^s adopted to develop Table S-15 were identical with those explained in the Technical Comment to Table S-14.

Table S-15

DIRECT AND TOTAL EMPLOYMENT IMPACT FROM TRAVELER EXPENDITURES IN THE MARITIME PROVINCES
DURING THE ENTIRE SEASON 1971^{1/}

	<u>NOVA SCOTIA</u>		<u>NEW BRUNSWICK</u>		<u>PRINCE EDWARD ISLAND</u>		<u>MARITIME PROVINCES</u>	
		%		%		%		%
<u>Direct Effects</u> ^{2/}								
) <u>Consumer Expenditures \$ at FDP to create 1 man-yr Employment</u>	6,856		7,182		6,188		6,603	
) <u>Man-yr created by Expenditures by:</u>								
(a) Overseas Visitors ^{4/}	162	51.4	127	40.3	26	8.3	315	100.0
(b) Extra-Regional Canadian & American Visitors & Resident Intra-Provincial Travelers	5,967	37.5	7,417	46.7	2,517	15.8	15,901	100.0
(c) Internal Provincial Resident Travel ^{4/}	4,539	55.4	3,128	38.2	521	6.4	8,188	100.0
Total	10,668	43.7	10,672	43.7	3,064	12.6	24,044	100.0
<u>Total Employment Impact of:</u>								
) <u>Consumer \$ Expenditures at FDP to create 1 man-yr of Employment</u> ^{3/}	4,143		3,656		3,303		3,633	
) <u>Man-Yrs Created by Expenditures by:</u>								
(a) Overseas Visitors ^{4/}	274	48.0	249	43.6	48	8.4	571	100.0
(b) Extra-Regional Canadian & American Visitors & Resident Intra-Provincial Travelers	9,874	33.9	14,570	50.0	4,708	16.1	29,152	100.0
(c) Internal Provincial Resident Travel ^{4/}	7,511	51.3	6,145	42.0	976	6.7	14,632	100.0
Total	17,659	39.8	20,964	47.3	5,732	12.9	44,355	100.0

(footnotes on following page)

FOOTNOTES TABLE S-15

- 1/ Based on data contained in Letter Report to R. Cunningham, Research and Planning, Department of Tourism, New Brunswick, from N. Campbell, dated August 10, 1972, (restricted). Letter Report from R. Cunningham to B. Murray, Department of Development, Charlottetown, P.E.I., dated August 21, (restricted), and a release by R. Rodgers, Nova Scotia Department of Tourism, entitled "Impact of Tourist Expenditures on Employment" (restricted).
- 2/ Direct effects include man-years of employment at final demand points where goods and services are consumed in finished form by the traveller.
- 3/ Total employment impact in man-years includes direct, indirect and induced effects.
- 4/ Values derived by assuming that direct, indirect and induced effect from expenditures by overseas visitors and residents travelling within provincial boundaries are similar to those generated by expenditures incurred by extra-regional visitors and resident intra-provincial travellers.

Data shown in Table S-15 can be interpreted as man-years of employment. The direct effects are those produced at final consumer demand point. Total employment impact includes direct, indirect and induced effects.

The man-years indicated in Table S-15 must be considered as general approximations of magnitude. Moreover, there is some divergence of opinion respecting the accuracy of the information presented in the source documents from which they were derived.

(b) Salient Features

(i) Direct employment effects from traveller expenditures within the maritime region were in the order of 24,400 man-years. The division among the provinces was as follows: Nova Scotia--10,700 - 44%, New Brunswick--10,700 - 44%, Prince Edward Island--3,000 - 13%.

Expenditures identified in the 1971 Exit Survey for the Maritime Provinces generated approximately 15,900 man-years of direct employment within the region. The individual provinces' shares were: Nova Scotia--6,000 - 37%, New Brunswick--7,400 - 47%, Prince Edward Island--2,500 - 16%.

(ii) Total employment impact in the Maritime Provinces was approximately 44,400 man-years. The division by provinces was: Nova Scotia--17,700 - 40%, New Brunswick--21,000 - 47%, Prince Edward Island--5,700 - 13%.

Expenditures revealed in the Exit Survey in the Maritime Provinces in 1971 created about 29,200 many-years of employment in the region. The division by provinces was as follows: Nova Scotia--9,900 man-years - 34%, New Brunswick--14,600 - 50%, Prince Edward Island--4,700 - 16%.

(c) Some Impressions and Conclusions

Previous remarks with respect to the income impact of expenditures noted in section 4. apply. No measure of employment in terms of full time, part time and casual categories is available. Moreover, complementarity and conflict in relation to multiple employment sources remain unexamined. Further research into these features of the employment pattern is necessary for effective policy and program planning.

VII. MEASURES OF SUPPLY STRENGTH AND QUALITY1. Introduction

In a separate report presented to the Department of Regional and Economic Expansion in November of 1972, the significant features of the geographical foundations of tourist and recreational supply, together with commercial accommodation and campsite development, were summarized.^{1/} The document is in essence a summary statement of supply that it would be redundant to repeat at this time.

It is recognized, however, that commercial accommodation is a major concern of the DREE administration, and hence a brief summary statement that could be conveniently used in conjunction with demand information would be useful.

2. Commercial Accommodation Facilities In the Maritime Provinces 1971 -- Table S-16(a) Technical Comment

The information in Table S-16 has been gathered from

1/ Baker, W. M. - Some Significant Supply Patterns In the Maritime Provinces, prepared for the Department of Regional Economic Expansion, Ottawa, November, 1972.

Table S-16

COMMERCIAL ACCOMMODATION IN THE MARITIME PROVINCES AND GASPE, 1971

	HOTELS						MOTELS				CABINS				TOURIST HOMES				TOTAL				
	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	
<u>Nova Scotia</u> ^{1/}																							
District 1	532	18	8	31	8	31	730	19	9	42	389	22	13	22	94	20	6	5	1745	19	9	100	
2	264	9	4	25	4	25	408	11	5	39	331	19	11	31	56	12	3	5	1059	12	5	100	
3	228	8	4	14	4	14	813	21	10	51	439	25	14	28	113	24	7	7	1593	17	8	100	
4	96	3	1	18	1	18	278	7	3	53	95	5	3	18	59	12	4	11	528	6	3	100	
5	661	22	10	29	10	29	1061	27	12	46	441	25	14	19	124	26	7	6	2287	25	12	100	
6	1207	40	19	65	19	65	574	5	7	31	63	4	2	3	27	6	2	1	1871	21	10	100	
Total	2988	100	46	33	46	33	3864	100	46	43	1758	100	57	19	473	100	29	5	9083	100	47	100	
<u>New Brunswick</u> ^{2/}																							
District 1	337	12	5	32	5	32	625	17	7	59	87	14	3	8	12	5	1	1	1061	14	5	100	
2	221	8	3	21	3	21	717	20	8	67	66	11	2	6	61	27	4	6	1065	15	5	100	
3	-	-	-	-	-	-	184	5	2	84	21	3	1	10	13	6	1	6	218	3	1	100	
4	294	10	6	35	6	35	493	14	6	59	37	6	1	5	11	5	1	1	835	11	4	100	
5	48	2	1	40	1	40	57	2	1	47	6	1	-	5	10	4	-	8	121	2	1	100	
6	681	24	10	46	10	46	636	18	8	43	141	22	4	9	37	16	2	2	1495	20	8	100	
7	1241	43	19	54	19	54	813	22	10	35	186	30	6	8	79	34	5	3	2319	32	12	100	
8	28	1	-	14	-	14	86	2	1	42	84	13	3	41	7	3	-	3	205	3	1	100	
Total	2850	100	44	39	44	39	3611	100	43	49	628	100	20	9	230	100	14	3	7319	100	37	100	

(continued)

		HOTELS			MOTELS				CABINS				TOURIST HOMES			TOTAL					
		Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.	Number (Rooms)	% of Prov.	% of Marit. Provs.	% of Dist.
<u>Prince Edward Island</u> ^{3/}																					
District	1	-	-	-	48	6	1	27	63	9	2	36	65	7	4	37	176	6	1	100	
	2	-	-	-	197	22	2	65	61	8	2	20	44	5	3	15	302	10	2	100	
	3	148	23	2	11	262	30	3	19	423	58	14	30	561	61	34	40	1394	44	7	100
	4	433	69	7	51	231	26	3	27	78	11	2	9	115	12	7	13	857	27	4	100
	5	48	8	1	11	141	16	2	33	104	14	3	24	138	15	9	32	431	13	2	100
Total		629	100	10	20	879	100	11	28	729	100	23	23	923	100	57	29	3160	100	16	100
<u>Maritime Provinces</u>																					
Total		6467		100	33	8354		100	43	3115		100	16	1626		100	8	19562		100	100
<u>Gaspé</u> ^{4/}																					
District	1	1511	41	-	69	603	28	-	27	76	24	-	3	15	14	-	1	2205	35	-	100
	2	1098	29	-	54	794	37	-	39	108	33	-	5	52	50	-	2	2052	33	-	100
	3	1114	30	-	55	742	35	-	36	137	43	-	7	37	36	-	2	2030	32	-	100
Total		3723	100	-	59	2139	100	-	34	321	100	-	5	104	100	-	2	6287	100	-	100

^{1/} Source: Province of Nova Scotia, Department of Development.

^{2/} Source: New Brunswick Accommodations, Department of Tourism New Brunswick.

^{3/} Source: Prince Edward Island Tourist Accommodation, Prince Edward Island Travel Bureau.

^{4/} Source: Hôtel du Québec, Gouvernement du Québec, Ministère du Tourisme, de la chasse et de la pêche.

a variety of sources as indicated in the footnotes. The capacity of the plant is indicated by province and tourist districts in relation to hotels, motels, cabins and tourist homes.

(b) Salient Features

(i) Combining all types of accommodation listed in Table S-16, the percentage division for capacity by province is as follows: Nova Scotia - 47, New Brunswick - 37, Prince Edward Island - 16. From Table S-10 (Items A. 1 - 7), the percentage of party nights spent in commercial accommodation by province was as follows: Nova Scotia - 34, New Brunswick - 50, Prince Edward Island - 16.

Demand in relation to capacity would seem to be most strong in New Brunswick, which has 37% of the accommodation capacity, but 50% of the party nights. In Nova Scotia, where 47% of the capacity is located only 34% of the party nights were recorded. In Prince Edward Island, the percentage values for accommodation capacity and party nights are identical - 16.

(ii) Within the Maritime Provinces, 33% of the capacity takes the form of hotel rooms, and the corresponding values by province are: Nova Scotia - 33%, New Brunswick - 39%, Prince Edward Island - 20%.

Only 10% of the party nights in the Maritime Provinces involved the use of hotel rooms, and the corresponding values by province were: Nova Scotia - 20%, New Brunswick - 5%, Prince Edward Island - 6%.

Clearly, hotel rooms do not play a major function in relation to the scale of the plant insofar as automobile

parties exiting the Maritime Provinces during the Entire Summer Season are concerned. The commercial viability of this plant rests solidly upon commercial demand and/or bar and beverage room sales.

(iii) About 43% of the capacity of the Maritime Provinces is in the form of motel units. Corresponding percentages by province are: Nova Scotia - 43, New Brunswick - 49, Prince Edward Island - 28.

Interestingly, 64% of the party nights spent in the maritime region involved the use of motel accommodation, and the corresponding values by province were: Nova Scotia - 60%, New Brunswick - 72%, Prince Edward Island - 49%. Motel accommodation is extremely significant in New Brunswick and of major consequence in Nova Scotia.

(iv) About 8% of the capacity of the Maritime Provinces is associated with rooms in tourist homes. The corresponding values by province are: Nova Scotia - 5%, New Brunswick - 3%, Prince Edward Island - 29%.

About 4% of the party nights spent in the Maritime Provinces were related to tourist home accommodation. The corresponding values by province were: Nova Scotia - 5%, New Brunswick - 1%, Prince Edward Island - 12%.

Clearly, tourist homes are of minor consequence in the overall accommodation pattern. They reach their maximum significance in a percentage sense in Prince Edward Island.

(v) About 16% of the total accommodation capacity of the Maritime Provinces is related to cabins. The corresponding values by province are: Nova Scotia - 19%, New Brunswick - 9%, Prince Edward Island - 23%.

About 22% of the party nights spent in the Maritime Provinces involved the use of cabin accommodation. The corresponding values by province were: Nova Scotia - 15%, New Brunswick - 22%, Prince Edward Island - 33%.

Clearly, cabins are of considerable importance as an accommodation type in an absolute and proportionate sense, reaching their greatest significance in Prince Edward Island.

(vi) Within the Maritime Provinces, the division of accommodation capacity by facility type was as follows: Hotels - 33%, motels - 43%, cabins - 16%, tourist homes - 8%. The corresponding percentage values for the division of party nights within the region during the Entire Season covered by the Exit Survey of 1971 were as follows: hotels - 10%, motels - 64%, tourist homes - 4%, cabins - 22%. The focus upon motels is clear, with this facility type accounting for 64% of the party nights while representing only 43% of the capacity.

In Nova Scotia, the division of capacity by type is as follows: hotels - 33%, motels - 43%, cabins - 19%, tourist homes - 5%. Here, there is a very close approximation to the regional average. Tourist homes are somewhat less significant in this proportional sense, and cabins somewhat more so.

Within New Brunswick, the division of the total capacity by accommodation type is as follows: hotels - 39%, motels - 49%, cabins - 9%, tourist homes - 3%. Here, the percentage values for hotels and motels are somewhat above those for the region, and those for cabins and tourist homes considerably lower.

In Prince Edward Island, the division of the total accommodation capacity by facility type is as follows: hotels - 20%, motels - 28%, cabins - 23%, tourist homes - 29%. In this instance the percentage values for hotels and motels are markedly below those for the region. In contrast, those for cabins and tourist homes are noticeably higher.

(c) Some Impressions and Conclusions

(i) In terms of the automobile parties travelling between or exiting the Maritime Provinces in 1971, motel and cabin accommodation is the really significant factors. This would appear to be the direction for future investment in accommodation facilities designed to meet travel requirements during the summer season.

(ii) Motel demands are probably generated essentially by those engaged in the landscape tour. Cabin accommodation will be used by those on the landscape tour, but probably is more significant in relation to those parties spending several nights at a particular destination.

In Prince Edward Island cabin accommodation reaches its maximum intensity in terms of plant capacity in relation to party nights. This clearly attributable to

the performance of Prince Edward Island as a holding area of major significance. Its beach resources are undoubtedly one of the prime causal factors.

* * * *