

Township of Pelee Island

Report on Pelee Island Tourism Experience Survey

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1. Introduction

1.1 Pelee Island Tourism Overview

The Township of Pelee consists of nine islands being Pelee Island, North Harbour Island, Middle Sister Island, Middle Island, East Sister Island, Hen Island, Chick Island, Big Chick Island and Little Chick Island. Pelee Island is the only inhabited island in the township. The northern tip of Pelee Island is located approximately 26 kilometres south of the Municipality of Leamington, in the western basin of Lake Erie. It lies at about the same latitude as the Ohio-Michigan border. As the largest Lake Erie island, Pelee Island is 14.5 kilometres long and 5.6 kilometres wide comprising of approximately 10,000 acres with about 6,400 acres of arable land. Much acreage is dedicated to conservation and natural heritage, which includes tourist attractions for bird watchers, hunters and eco-tourism activities.

According to the *Windsor, Essex County & Pelee Island Premier-Ranked Tourist Destination Evaluation Report* (2003), Pelee Island is considered a core attraction that draws tourist travel to the regional area on its own, as opposed to being part of a regional complex. The island is seen as one of the area's "most recognizable destinations", known particularly for birding and relaxation.

The island features a number of cultural / entertainment facilities, including the Pelee Island Winery Pavilion and Pelee Island Heritage Centre. It also supports three nature reserves: Fish Point, Lighthouse Point, and Stone Road Alvar Complex. A number of habitat restoration projects are underway on the Island, including a 40-acre wetland restoration by the Wilds of Pelee Island, a red cedar savannah restoration by the Pelee Island Winery, a sustainable agriculture display supported by the Pelee Organic Demonstration Farm and several private restoration projects. The popularity of natural and recreation type of activities on Pelee Island is reflected by its 16 natural / recreation attractions, as compared to four cultural / entertainment attractions.

In addition to the physical tourism offerings, there are also approximately 10-15 annual festivals and events that draw visitors to Pelee Island at specific times of year. The Pelee Island Winery is one of the most popular cultural / entertainment venues on the island, supporting 20-25 weddings, banquets, meetings and leisure events annually.

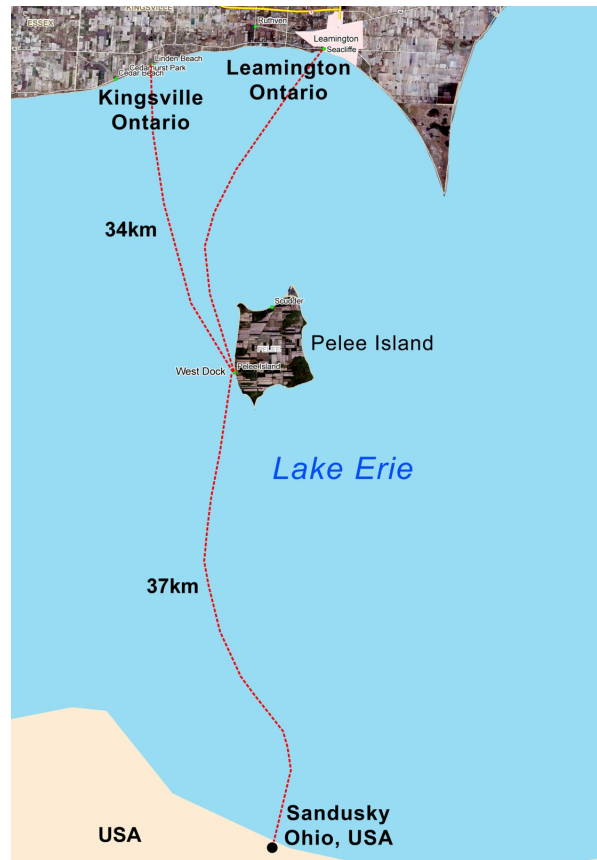
Accommodations on the Island are limited to one inn, two motels and 13 bed & breakfast (B&B) establishments, in addition to an estimated 53 rental cottages / homes that are available for tourists during the peak tourism season.

The traditional B&Bs and inns / motels provide almost half (46%) of Pelee's total accommodation units. It is understood that 53 cottages and / or homes are rented out to tourists on a weekly basis during the peak months of the summer (92 days), and that the campground facilities offered at East Park Campground are available for 180 operating days (May to October).

The island also offers five restaurants with approximately 200 seats in total (inclusive of outdoor patio space).

Pelee Island is accessible from mainland Ontario and Ohio, US by personal watercraft, ferry and air services. The Ontario Ministry of Transportation (MTO) provides ferry services via Leamington and Kingsville, Ontario, Sandusky, Ohio, US and Pelee Island's West Dock. Ferry trips to Pelee Island from Ontario and the US are approximately equidistant, as shown in **Exhibit 1-1**.

Exhibit 1-1 Pelee Island Ferry Routes



The 3 major sources of transportation to Pelee Island are ferryboat, air and pleasure boat, which are listed below along with the points of departure:

1. Ferry (operated by the Ontario Ministry of Transportation)
 - Ontario – Leamington or Kingsville
 - US – Sandusky, OH
2. Air (operated by Cameron Air on behalf of MTO and by private owners)
 - Ontario – Windsor
 - US – Sandusky, OH
3. Private Pleasure Boat
 - Ontario – Windsor, Leamington, or Kingsville
 - US – Ohio or Michigan

Tourism Statistics for Pelee Island in 2008

Based on the Tourism / Seasonal Resident Trips by Mode analysis completed for the Ministry of Transportation's (MTO) Pelee Island Transportation Needs Study, Statistics Canada travel survey visitor profile for Rural Essex County and feedback from Public Information Centre #1 held for the Pelee Island Transportation Needs Study, in 2008 approximately 68% of visits Pelee Island were made by Canadian visitors, 32% were from the US, and about 1% were made by overseas visitors. Of these visits, the majority were made by Canadian overnight visitors (48%),

followed by US overnight visits (30%). Of the overnight visits, 61% were from Canada, 38% US, and 1% from overseas. Same day visits show a greater share from Canada: 91% Canadian, 8% American and less than 1% from overseas.

57% of all visitation to Pelee Island is estimated to have occurred during the Summer months (July, August), followed by Spring (April, May, June) at 24%, late Fall at 19%, and Winter at less than 1%. Summer by far draws the most visitation to the Island, regardless of place of origin.

1.2 Survey Purpose

The Pelee Island Tourism Experience Survey was undertaken on behalf of Pelee Island to support the MTO Pelee Island Transportation Needs Study. The purpose of the survey was to capture the overall tourism experience of the Island and to determine potential areas of strength to build on, and potential opportunities or areas for improvement for consideration by the Municipality of Pelee Island and the Island's tourism industry. The survey was developed for tourists and non-residents as they ended their Island visit, using Statistics Canada's definition of tourists and non-residents as follows:

- Any overnight visitors who stay at least one night away from their usual place of residences (this includes cottager owners); and
- Any person visiting an area on a same-day trip, without staying overnight.

The key areas of the survey included the following:

- Length of stay for the average tourist
- Tourist trip frequency to the Island
- Tourist awareness of on-Island transportation services available on Pelee Island
- Island amenities and services for tourists, including:
 - Accommodation available
 - Points of Interest
 - Dining
 - Shopping opportunities
- Average tourist expenditures on the Island.

Since 78% of tourists travel to and from Pelee Island by ferry the tourism experience survey only involved tourists on ferries outbound from the Island.

2. Pelee Island Tourism Experience Survey Design

2.1 Design of the Survey Form

The sample interview form was prepared in consultation with the Township of Pelee Island and is shown in **Exhibit 2-1**. This form was designed to collect the following information:

A. Form identification: date, time and destination.

The information on the date, time and destination provides categorization details when analyzing data.

B. Demographic information such as residence, party size and household membership.

This group of questions were included to provide information about what demographic of tourists are coming to visit Pelee Island. Specific information was collected for place of residence for city/town and province/state, and for the size of the tourist travel “party”.

C. Trip duration on Pelee Island

This group of questions was asked to determine common lengths of stay when visiting the Island and whether or not day users had enough time to visit the Island.

D. Trip frequency to Pelee Island

This question was asked to determine a common frequency of travel among tourists.

E. Trip preparation

Tourist information for the Island is available at a variety of tourist locations. This group of questions was asked to determine how tourists found information on the Island and their main reason for visiting the Island.

F. Travel mode on the Pelee Island

This group of questions was asked to determine the common mode of travel on the Island by tourists and whether or not tourists travelling by vehicle would come if they could not bring their own vehicle.

G. Overnight stay: accommodation type, booking and rating

Pelee Island has one (1) inn, two (2) motels, 13 bed & breakfast establishments and 53 rental cottages / homes that are available for tourists. This group of questions was asked to determine what types of accommodations tourists are booking and how they rated their type of accommodation.

H. Dining and Eating: purchased food from store, restaurant, pub, inn or bakery and rating

The Island has five (5) dining establishments with approximately 200 seats in total. This group of questions was asked to determine the number of tourist parties that purchased food from local stores and how they rated that food purchasing experience, and the number of tourist parties that dined while on the Island and how they rated their dining experience.

I. Attractions visited and rating

Pelee Island has a number of tourist attractions. This question was developed using to determine what types of attractions tourists are going to see while on the Island.

J. Activities participated in and rating

This question was developed using the township’s ‘Experience Pelee’ brochure to determine the types of activities tourists engage in while visiting the Island, and how they rated them.

Exhibit 2-1 Pelee Island Tourism Experience Survey

Pelee Island Tourism Experience Survey

A →

Departure Date from Pelee Departure Time from Pelee Mainland Destination Surveyor _____

Day Month Hour Minute

1. Leamington 3. Sandusky
2. Kingsville

We are conducting a short Tourist survey for the Township of Pelee Island about tourist experience on Pelee Island today. If you are a tourist (i.e. no permanent residences or employment on island), please answer these quick questions about your Pelee Island visit today?

B →

Place of Residence and Party Size

1. Where do you live (usual place of residence)? _____
(City/Town) (Province / State)

2. How many people, including yourself, are in your travel party today? #

3. How many of these people are members of your household? #

4. How many of these household members are less than 18 years old? #

C →

Duration of Your Tourist Visit on Pelee Island

5.a) How many nights did you spend on the island during this visit? #

5.b) If you spent only one day on the island, was there enough time between your sailing times to see and do what you wanted? Y/N

D →

Your Tourist Trip Frequency to Pelee Island

6. How many times have you visited Pelee Island as a tourist in the last year?

E →

Planning Your Visit on Pelee Island

7. Before this trip, did you try to obtain tourist information about Pelee Island? Y/N

8. If "Yes," where did you find this tourist information?

1. Internet 4. Provincial Tourism kiosk
2. At Ferry Terminal 5. Other
3. Tourism Windsor Essex Pelee Island publication 6. Don't Know

9. What was your MAIN reason for this visit?

1. Visit Second Home, Cottage 5. Business/Work Related
2. Visit Friends/Relatives 6. Other
3. Pleasure/Holiday/Vacation

10. Did you encounter any problems or change your trip plans because of the availability of ferry passage? Y/N

F →

Your Travel while on Pelee Island

11. What mode of transportation did you use to get around the island?

1. Walked from Ferry Terminal 4. Bicycle 7. Motorcycle
2. From Vehicle Parked at Dock 5. Passenger Vehicle 8. Bus
3. Private Drop-off at Dock 6. Truck 9. Taxi

12. If you came to Pelee Island by vehicle, would you have come if you couldn't bring your own vehicle? Y/N

13. Would your answer to #12 be different if there was a tourist shuttle service provided on the island, upon your arrival? Y/N/D

G →

Your Accommodation Experience on Pelee Island

14. If you stayed overnight, where did you stay?

1. Bed & Breakfast 5. Marina
2. Motel/Inn 6. Friends/Family (cottage or house)
3. Rental Cottage/House 7. Other
4. Campground

15. If and when you booked commercial accommodations (i.e. B&B, rental cottage), did you need to make a ferry reservation first? Y/N

15a. How would you rate your commercial accommodation experience on a scale of 1 (Poor) to 5 (Excellent)?

H →

Your Dining/Eating Experience on Pelee Island

16. While on the Island, did you purchase food from a store? Y/N

16a. How would you rate the quality and availability of purchased food, on a scale of 1 (Poor) to 5 (Excellent)?

17. While on the Island, did you eat at a restaurant, pub, inn, or bakery? Y/N

17a. How would you rate your dining experience on a scale of 1 (Poor) to 5 (Excellent)?

I →

Attractions and Activities during your Visit to Pelee Island

18. Did you visit any of the following attractions or places of interest during your trip?

1. Pelee Island Heritage Centre

2. Pelee Island Art Works

3. Pelee Island Winery

4. Lighthouse Point Nature Reserve

5. Stone Road Alvar

6. Fish Point Nature Reserve

7. Historic Island Churches

8. Beaches

9. Eco-trail System

10. Bird Observatory

11. Marina (Fishing/Diving)

12. Organic Farm

18a. How would you rate the attractions you visited on a scale of 1 (Poor) to 5 (Excellent)?

J →

19. Did you participate in any of the following activities on Pelee Island?

1. Bicycle Rental

2. Motorized scooter/Electric bike

3. Kayak/Canoeing

4. Jet skiing

5. Power boating

6. Row boating

7. Bird-watching

8. Hunting

9. Festival or Event

10. Fishing

11. Walking/Hiking Tour

12. Swimming/Relaxing on Beaches

13. Winery Tour/ Special Event

19a. How would you rate your other activity/recreation experience on a scale of 1 (Poor) to 5 (Excellent)?

K →

Trip Spending While on Your Trip to Pelee Island

20. During this trip to Pelee Island, please estimate how much you and your travel party spent on the following items on the Island:

1. Accommodation \$ _____

2. Food & Beverage at Restaurants/Bars \$ _____

3. Food & Beverage at Stores \$ _____

4. Vehicle Rental/Insurance \$ _____

5. Vehicle Operation (i.e. fuel) \$ _____

6. Local Transportation on Pelee Island \$ _____

7. Ferry Fees \$ _____

8. Sports, Recreation, and associated Rentals \$ _____

9. Cultural & Entertainment Activities/Attractions \$ _____

10. Other (souvenirs, shopping, photos, etc.) \$ _____

11. TOTAL \$ _____

L →

Your Overall Pelee Island Experience

21. How would you rate your OVERALL Pelee Island experience on a scale of 1 (Poor) to 5 (Excellent)?

22. Do you plan to return to Pelee Island? Y/N

22a. If "Yes", when will you return? (Month/Year) _____

22b. If "No", briefly explain why not. _____

All information provided by you will be treated in the strictest confidence and will only be used for research purposes.

K. Trip spending

The purpose of this question was to determine a breakdown of tourist travel party spending for tourists when visiting the Island.

L. Overall Pelee Island Tourism Experience rating

After asking various questions about difference travel aspects, this question was developed to find out what overall experience travel groups had after visiting the Island, and if they didn't plan to return, to find out why.

2.2 Survey/Sample Process

The survey took place on Friday July 9th, Saturday July 10, and Sunday July 11th, in order to capture an entire summer weekend of tourist travel from Pelee Island. Surveys were conducted on board ferry trips from Pelee Island to both the Ontario and Ohio mainland. Three surveyors were on board the Jiimaan and one surveyor was on board the Pelee Islander to conduct the survey interviews.

Ferry passenger records were provided by the OSTC to present an indication of ridership during the period of noon on Friday, July 9th 2010, until the last ferry at 8:00 pm on Sunday, July 11th, 2010. **Exhibit 2-2** provides a summary of the total passengers on each trip.

Exhibit 2-2 Total Passenger Numbers on Jiimaan and Pelee Islander During Tourism Experience Survey

Ferry	Date	Destination	Time	Total Passengers	Number of Surveys Completed
Jiimaan	Friday July 9, 2010	Leamington	12:00	56	15
		Leamington	16:00	64	16
		Leamington	20:00	62	13
Pelee Islander	Friday July 9, 2010	Sandusky	13:00	37	5
		Sandusky	18:00	25	8
Jiimaan	Saturday July 10, 2010	Leamington	12:00	74	15
		Leamington	16:00	163	22
		Leamington	20:00	132	21
Pelee Islander	Saturday July 10, 2010	Leamington	9:00	7	1
		Sandusky	13:00	42	8
Jiimaan	Sunday July 11, 2010	Leamington	12:00	148	24
		Leamington	16:00	185	18
		Leamington	20:00	144	22
Pelee Islander	Sunday July 11, 2010	Leamington	9:00	65	8
		Sandusky	13:00	38	14
		Sandusky	18:00	71	11

Note: Each survey completed was for a tourist travel party which ranged in size from one to seventeen persons.

3. Tourism Experience Survey Results

The survey of tourist passengers on board the Jiimaan and the Pelee Islander leaving Pelee Island occurred from the 12:00 pm Jiimaan ferry on July 9th, 2010 to the 8:00 pm Pelee Islander ferry on July 11th, 2010 (see **Exhibit 2-2**). Tourists on every ferry leaving Pelee Island during that time period were surveyed. Overall, there were a total of 17 ferry trips on which surveys were undertaken, and 221 surveys were completed (where 1 survey was conducted for each tourist travel party which ranged in size from one to seventeen persons).

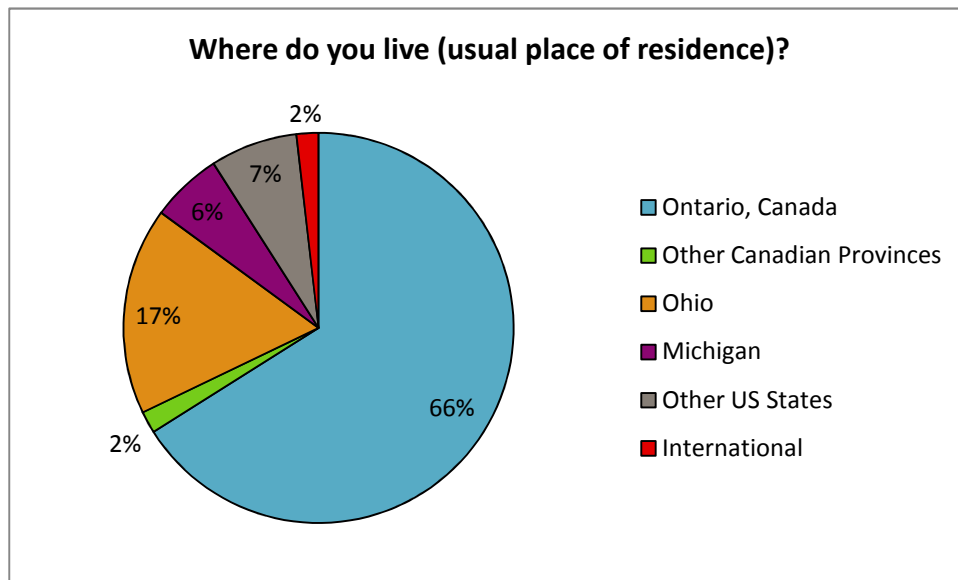
3.1 Tourism Experience Survey Results Based Upon Category of Response

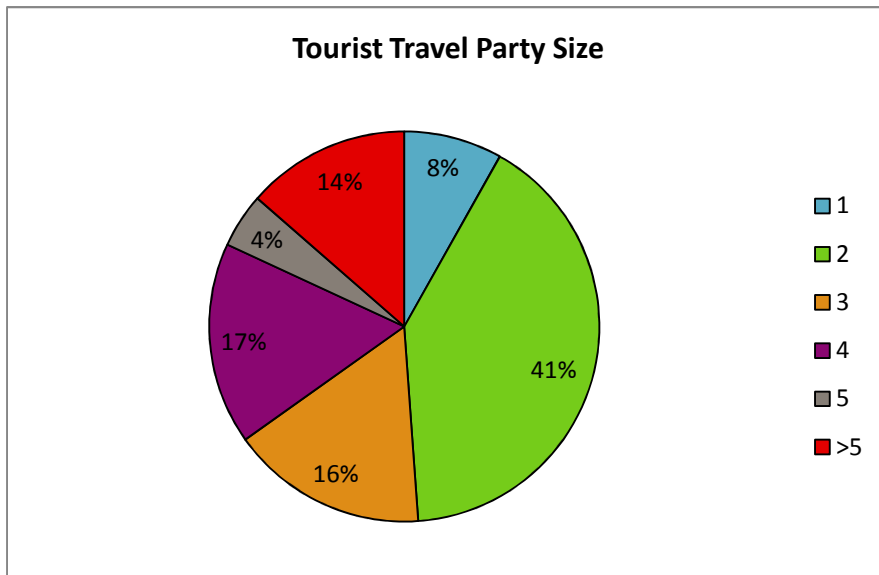
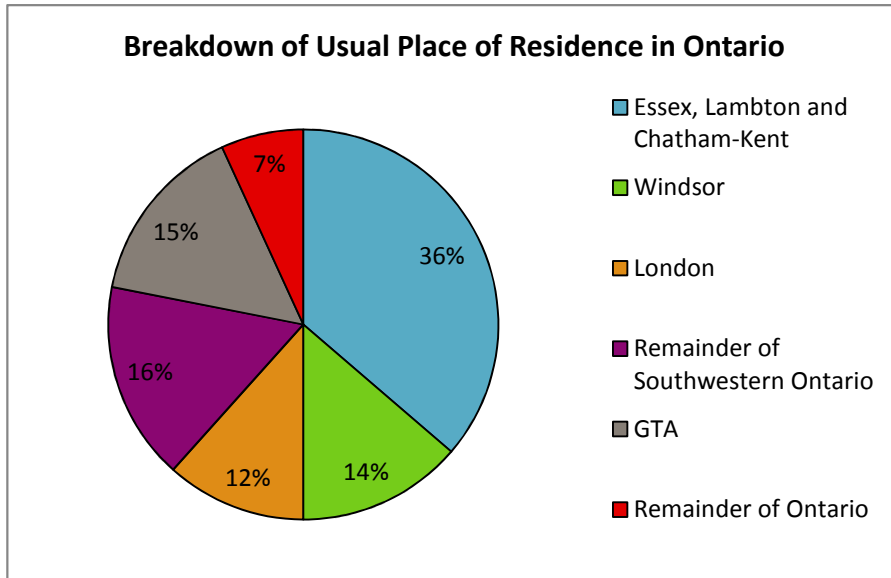
3.1.1 Place of Residence and Tourist Travel Party Size

Exhibit 3-1 shows the country of residence, tourist travel party size, members of travel party in a household and members of travel party who are less than 18 for each party interviewed during the three day period.

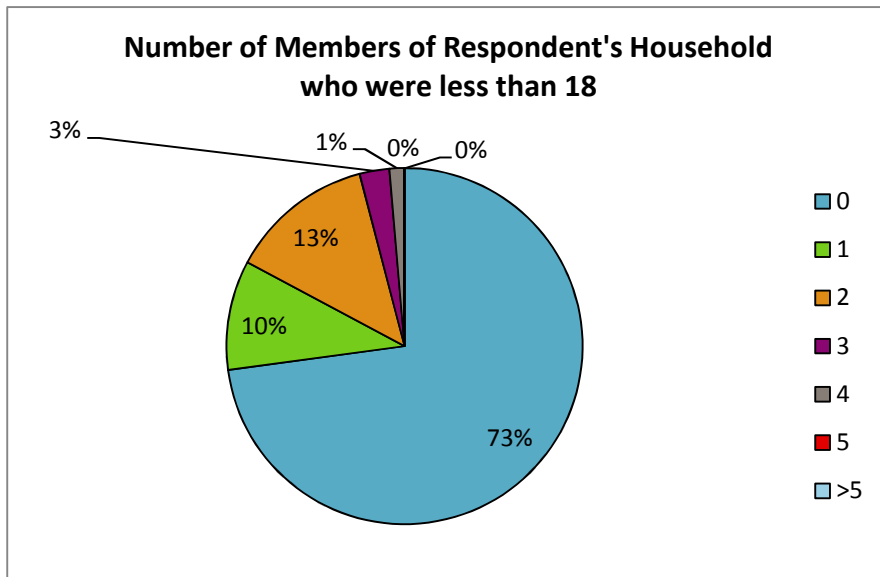
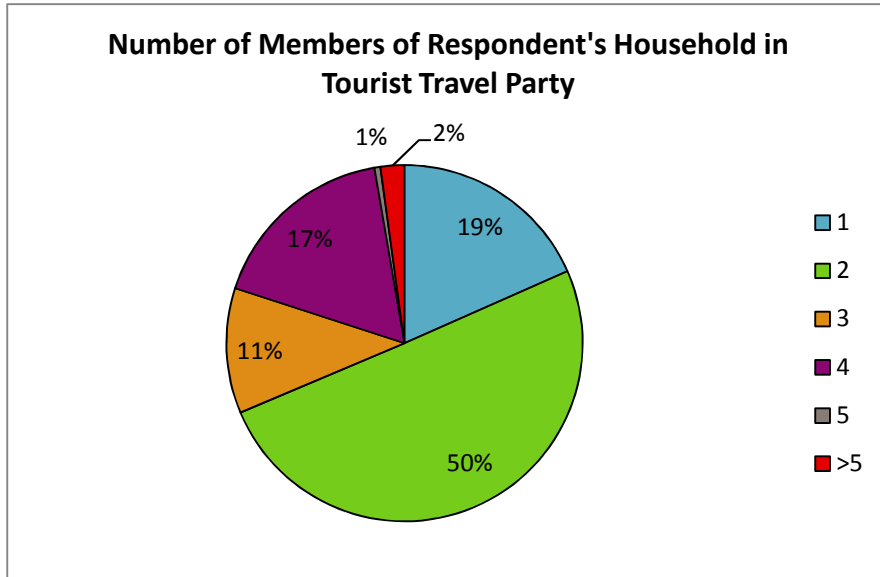
Out of the 221 responses, 68% of the respondents were Canadian, where 66% were from Ontario and 2% were from other Canadian provinces. Overall, 29% of respondents were American, where 17% were from Ohio, 6% were from Michigan and the remaining 7% were from other US states. Only 3% of respondents were International. 78% of the Ontario visitors were from southwestern Ontario. 41% of tourist travel party sizes comprised of two people, where 50% of travel parties were made up of two members from their household. Average tourist travel party size was 3.45 people. 71% of travel parties did not have household members who were less than 18 years old travelling with them.

Exhibit 3-1 Place of Residence and Party Size





Note: Tourist travel party size ranged from one to seventeen, with an average travel party size of 3.45 people.

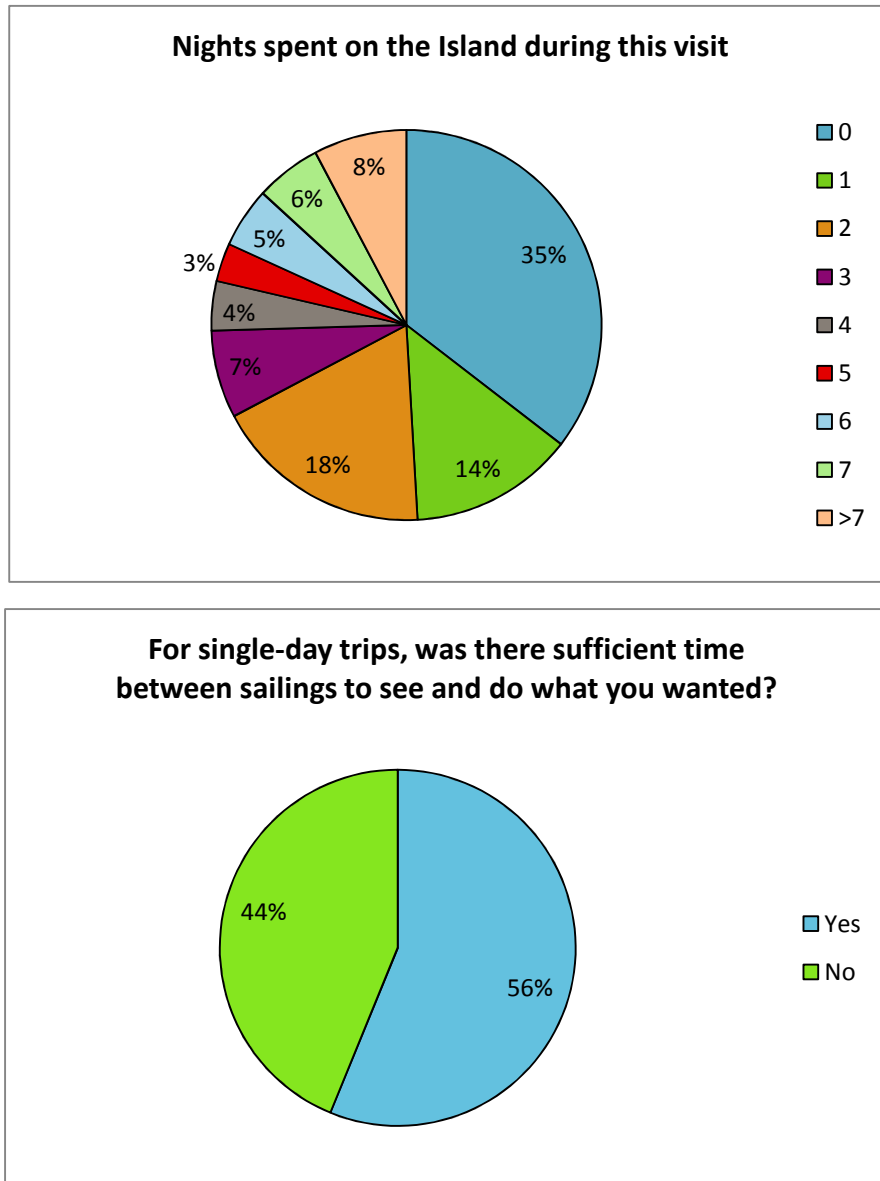


3.1.2 Duration of Tourist Visit on Pelee Island

Exhibit 3-2 provides a summary of how many nights that tourist travel parties spent on the Island and whether or not the ferry schedule allows day trippers to see everything that they wanted to see. 35% of the individuals surveyed were single-day trippers that did not stay on Pelee Island overnight, while 14% of respondents stayed on Pelee Island for one night, 18% stayed on Pelee Island for two nights, and 11% stayed for 6-7 nights. It should be noted that when travelling from Sandusky, it is not possible to have a single-day return trip.

Of the 35% who were single-day trippers, 56% had sufficient time between sailings to see everything on the Island that they came to see while 44% did not.

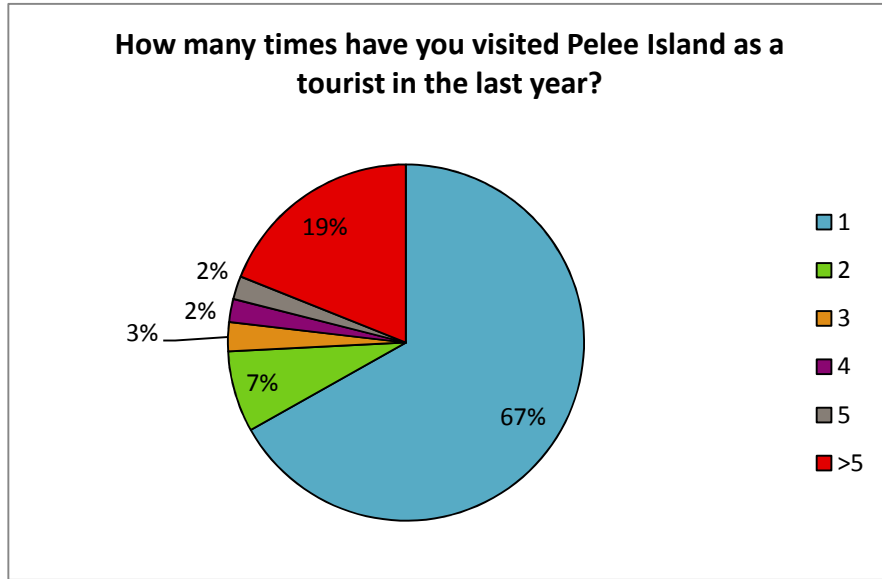
Exhibit 3-2 Length of Visit while on Pelee Island



3.1.3 Tourist Trip Frequency to Pelee Island

Each individual surveyed was asked how many times they had visited Pelee Island in the last year. **Exhibit 3-3** summarizes the responses. The responses reflected that the majority of individuals were travelling to Pelee for the first time in the last year, while a smaller portion had come to the Island more than 5 times.

Exhibit 3-3 Tourist Trip Frequency to Pelee Island

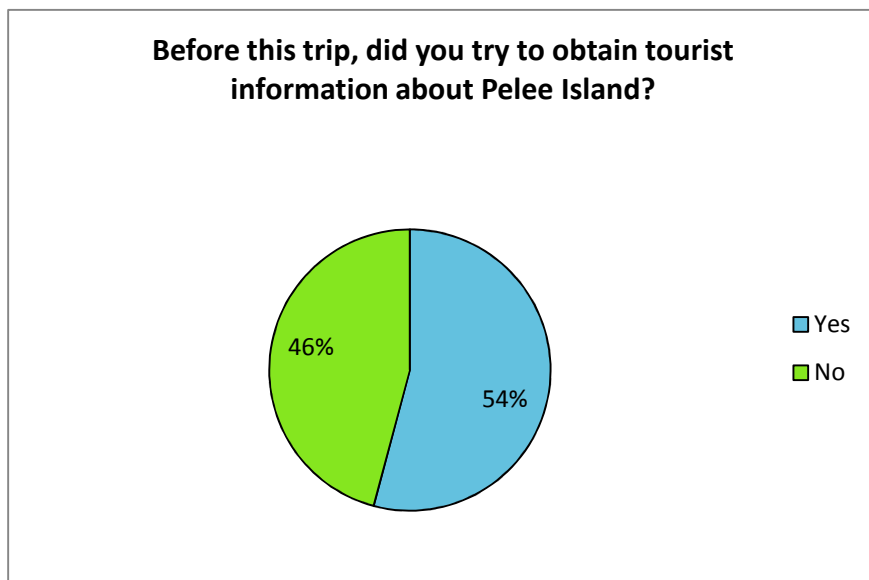


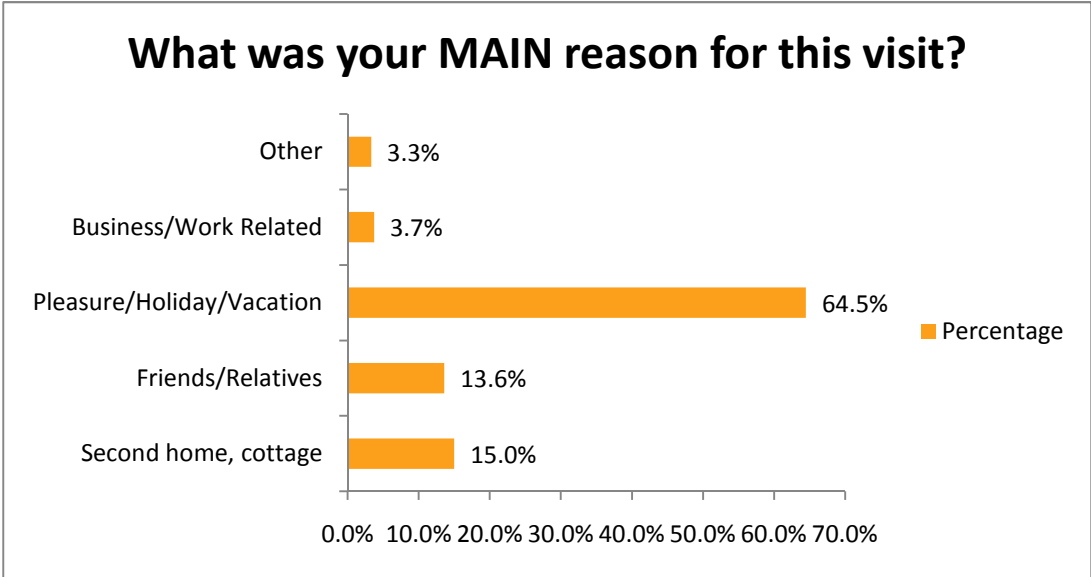
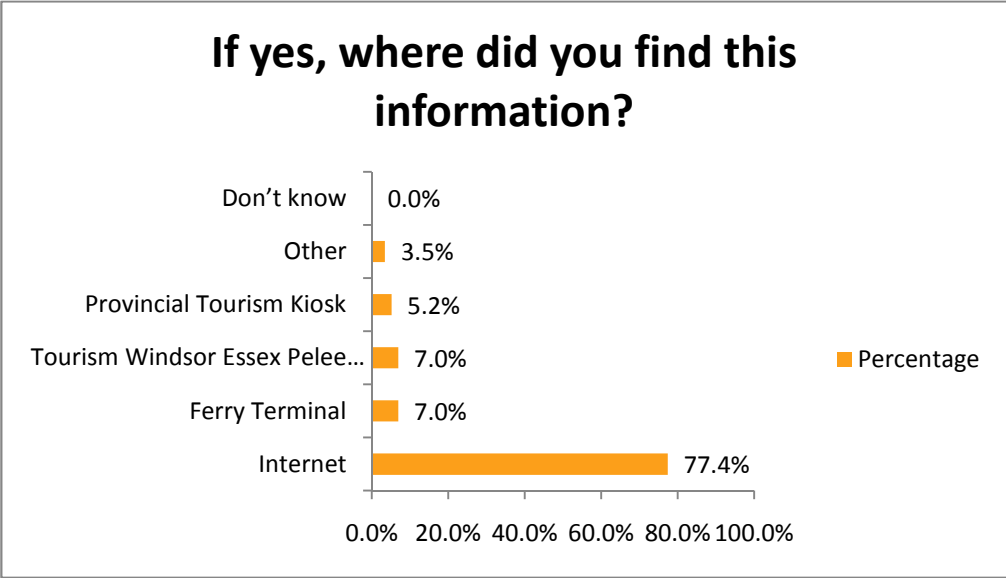
3.1.4 Planning Visit to Pelee Island

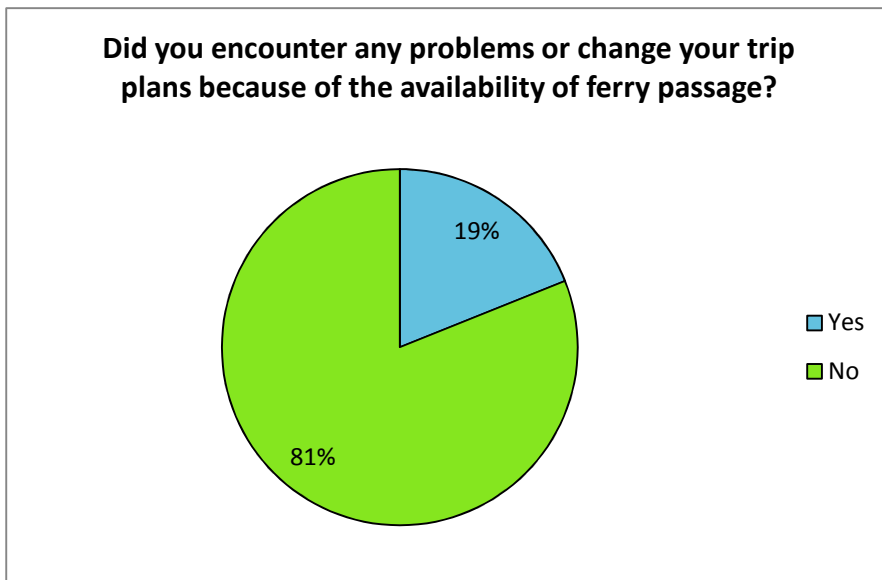
Individuals who were surveyed were asked questions about how they planned their trip to the Island. **Exhibit 3-4** summarizes the responses to the four questions asked. Out of the respondents, 54% of individuals tried to obtain tourist information before coming to the Island, while 46% of individuals did not. Of the 54% of respondents who sought out tourist information, 77% found their information on the internet.

The main reason that respondents came to the Island was for pleasure/holiday/vacation. A smaller percentage came to Pelee to visit their second home/cottage and friends/relatives. Of all the individuals surveyed 19% had problems arranging ferry reservations, or had to change their trip plans because of the availability of ferry passage.

Exhibit 3-4 Planning Visit to Pelee Island





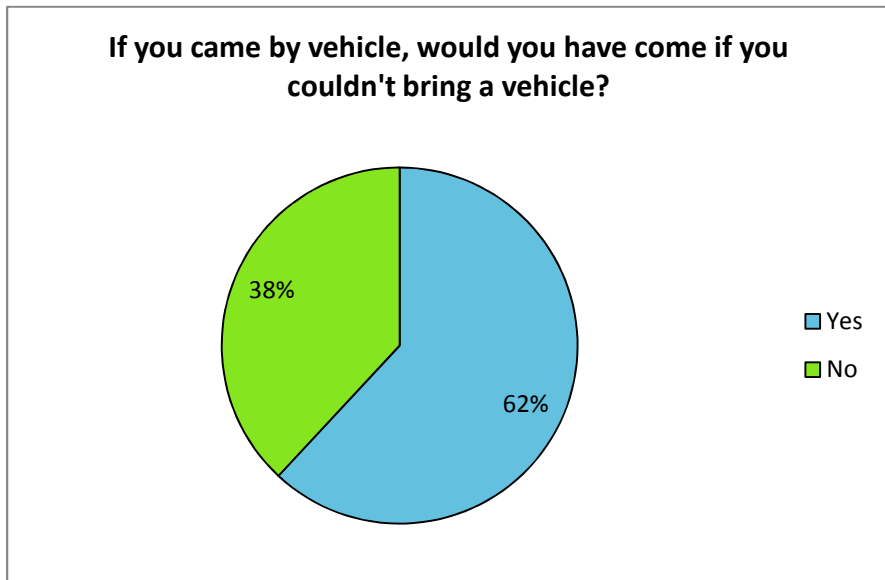
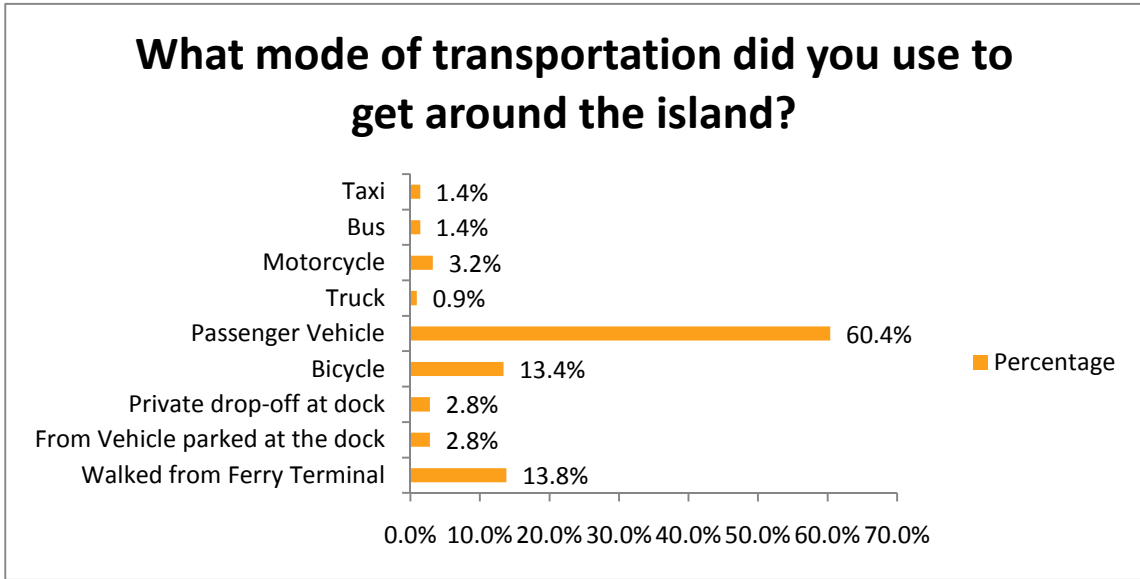


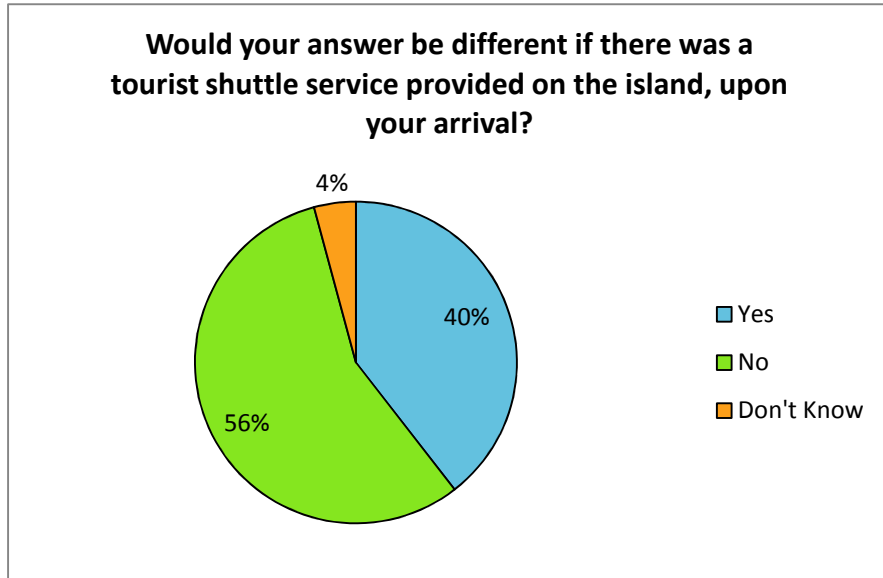
3.1.5 Travel Mode on Pelee Island

Each individual surveyed was asked what mode of transportation they used to get around the Island, and if they would come to the Island if they could not bring a vehicle. **Exhibit 3-5** summarizes the responses. Of the 221 surveyed, 60% of individuals used their passenger vehicle to get around the Island, 14% walked from the ferry terminal and 13% used their bicycle.

Of the individuals who came to the Island by vehicle, 38% of respondents answered that they would not come if they could not bring a vehicle to the Island. Of this percentage, 56% would not change their answer if the Island offered a tourist ferry shuttle service. However, it should be noted that the question did not indicate whether or not there would be a charge to use a shuttle service. In addition, there are a number of cottagers who keep a car at the municipal parking lot opposite the ferry terminal.

Exhibit 3-5 Travel Mode on Pelee Island

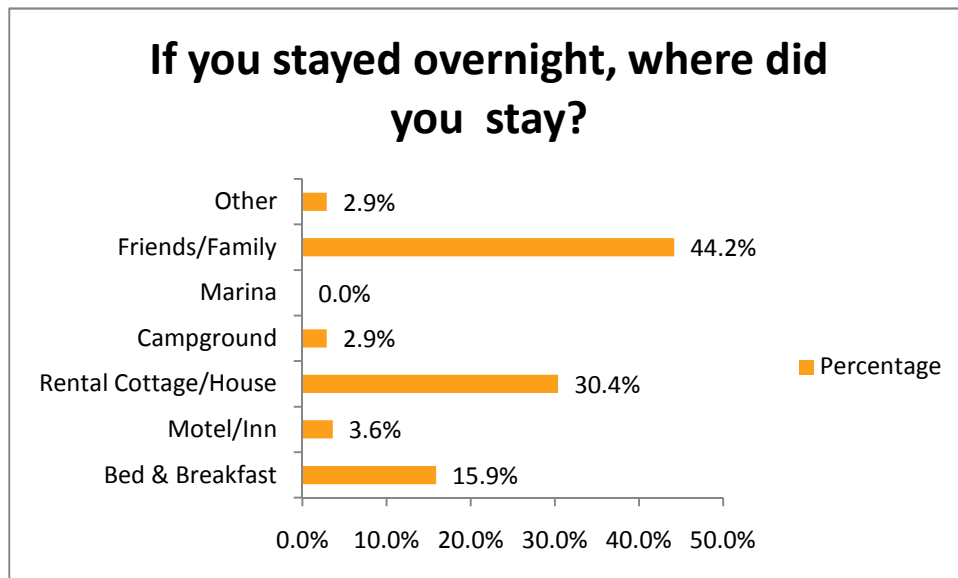


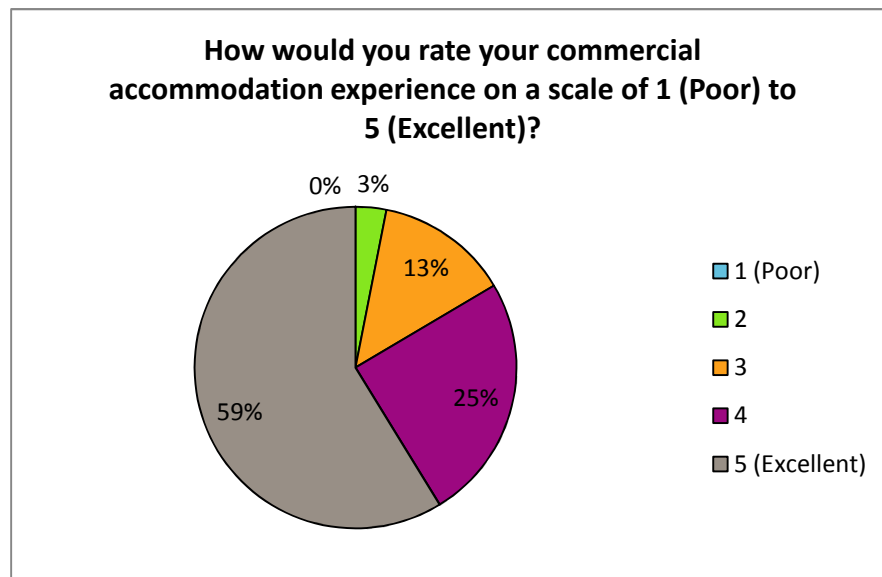


3.1.6 Accommodation Experience

The individuals surveyed who stayed overnight were asked where they stayed, if they had booked the ferry in advance of their accommodations and to provide a rating for their commercial accommodation. **Exhibit 3-6** summarizes the responses. Of the 65% of respondents who stayed overnight, 44% stayed with friends and family, 30% rented a cottage or house, 16% stayed at a bed and breakfast 3.6% stayed at a motel, and 2.9% camped. Surveys had an even response between whether or not they booked their ferry passage in advance of their accommodations. Tourist passengers were asked to rate their commercial accommodations on a scale of 1 (poor) to 5 (excellent). The majority of respondents who stayed at a commercial accommodation gave a 4 or 5 rating.

Exhibit 3-6 Accommodation Experience



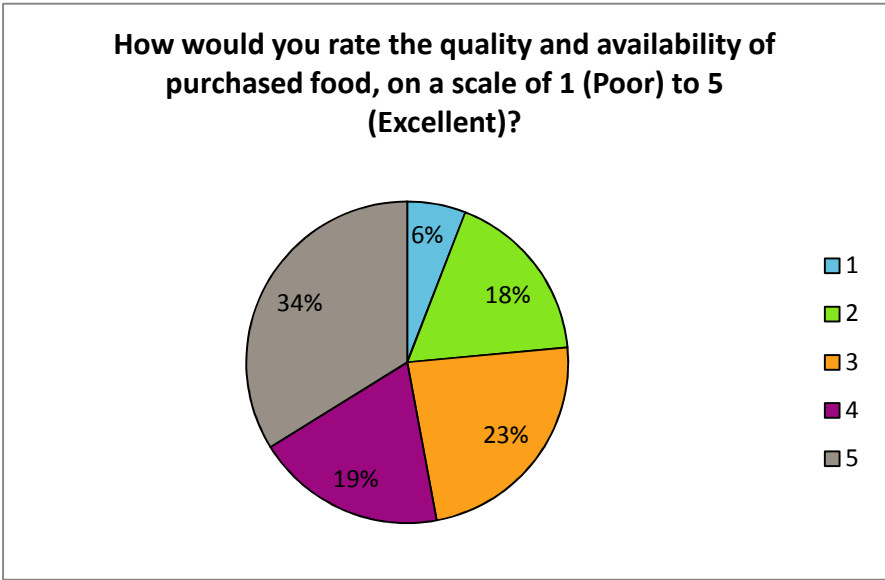
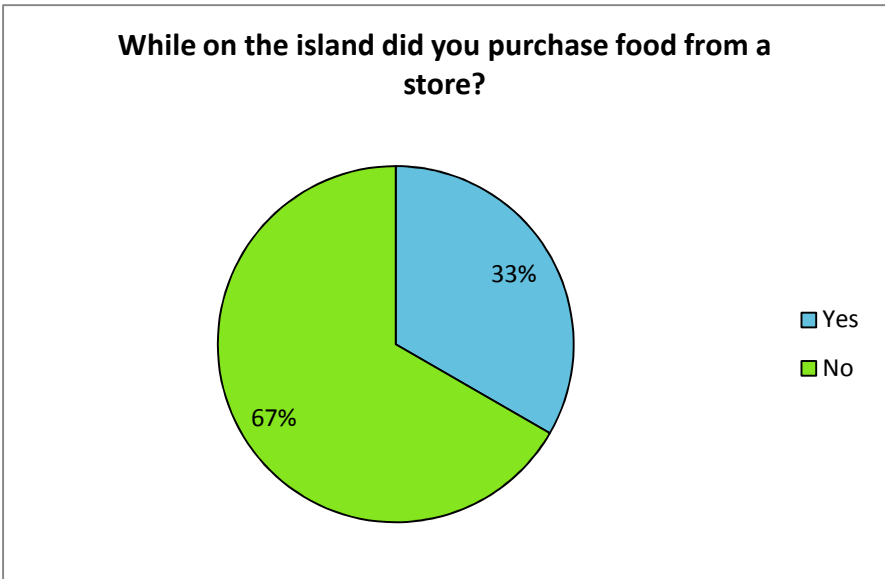


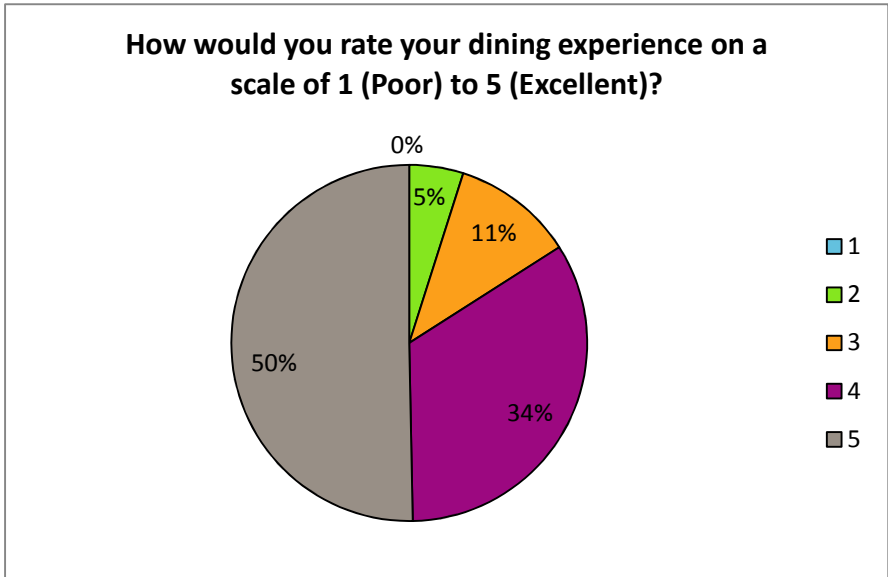
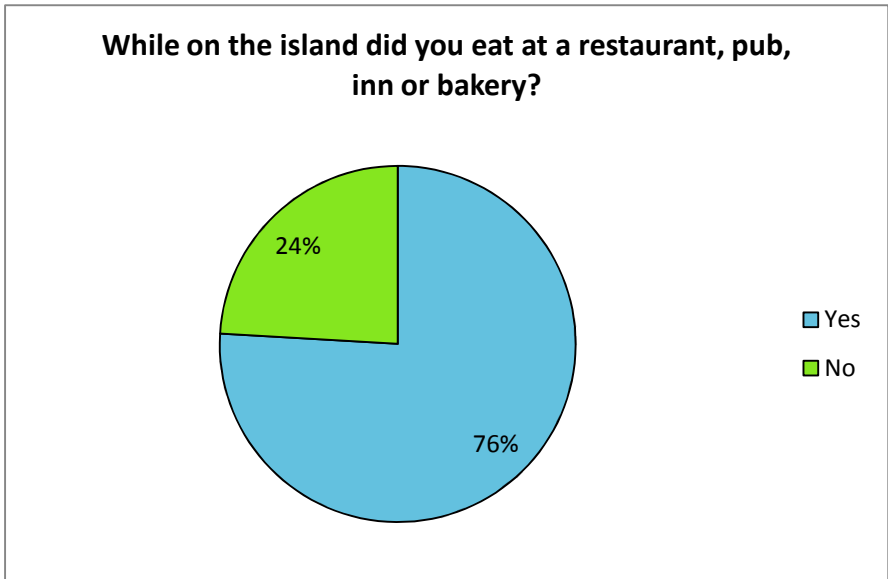
3.1.7 Dining/Eating Experience

All of the individuals surveyed were asked about their dining/eating experience and to rate it on a scale of 1 (poor) to 5 (excellent). **Exhibit 3-7** provides a summary of the responses. 33% of the respondents purchased food from a store while on the Island. Of these individuals, the rating of the food that was purchased ranged from 2 to 5.

While on the Island, 75% of respondents ate at a restaurant, pub, inn or bakery. The majority of individuals gave their dining experience a 4 or 5 rating.

Exhibit 3-7 Dining/Eating Experience on Pelee Island





3.1.8 Attractions and Activities

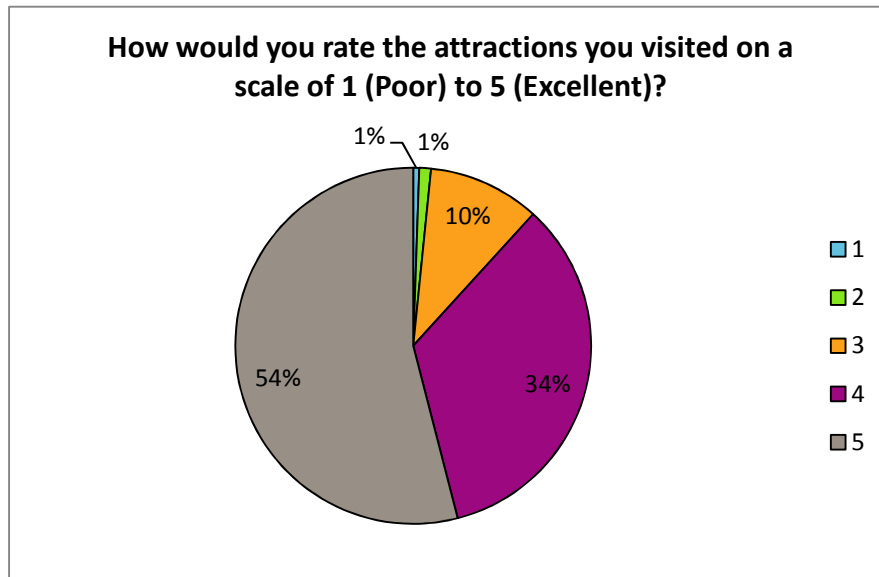
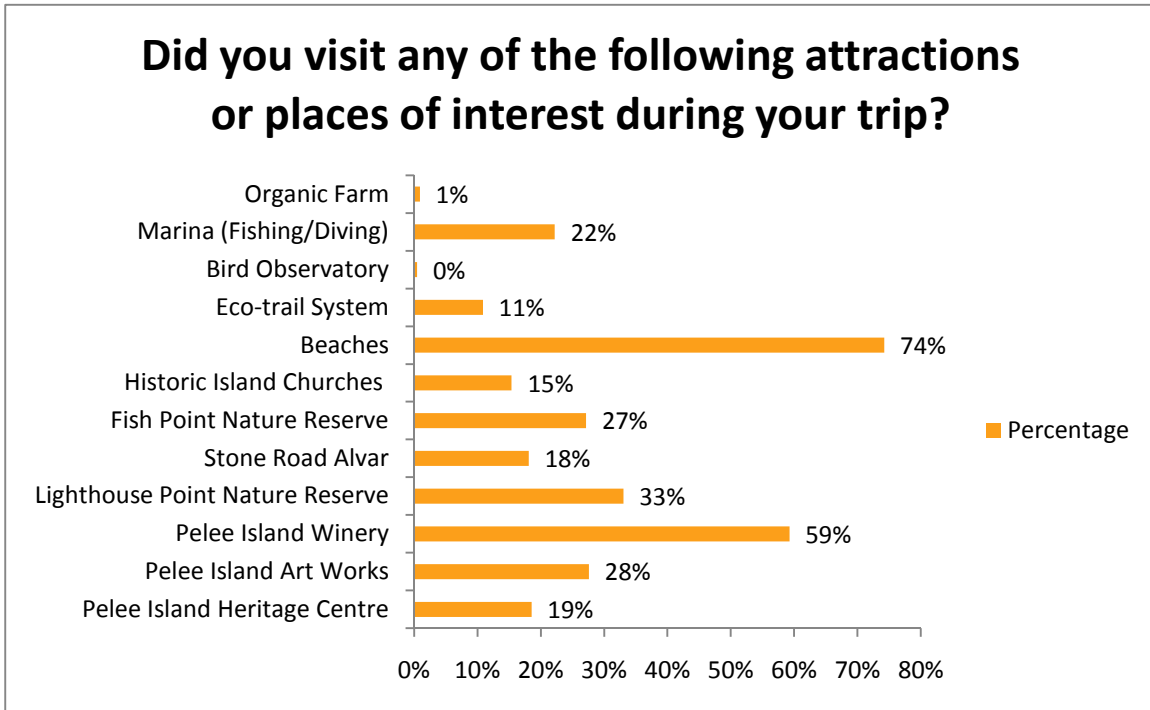
All of the individuals surveyed were asked to identify whether or not they had visited the following attractions or places (this list was developed with the assistance of Township of Pelee Island):

- Pelee Island Heritage Centre
- Pelee Island Art Works
- Pelee Island Winery
- Lighthouse Point Nature Reserve
- Stone Road Alvar
- Fish Point Nature Reserve
- Historic Island Churches
- Beaches
- Eco-trail System
- Bird Observatory
- Marina (fishing/diving)
- Organic Farm

It should be noted that the bird observatory was not open for visitors during the survey period.

After identifying the attractions that they had visited respondents were asked to rate the attractions on a scale of 1 (poor) to 5 (excellent). **Exhibit 3-8** summarizes the responses. Overall, 74% of the individuals surveyed visited the beaches and 59% visited the Pelee Island Winery. Only 0.9% of respondents visited the organic farm and 0.4% went to the bird observatory. The majority of individuals rated the attractions as 4 or 5.

Exhibit 3-8 Attractions or Places of Interest Visited during Trip to Pelee Island



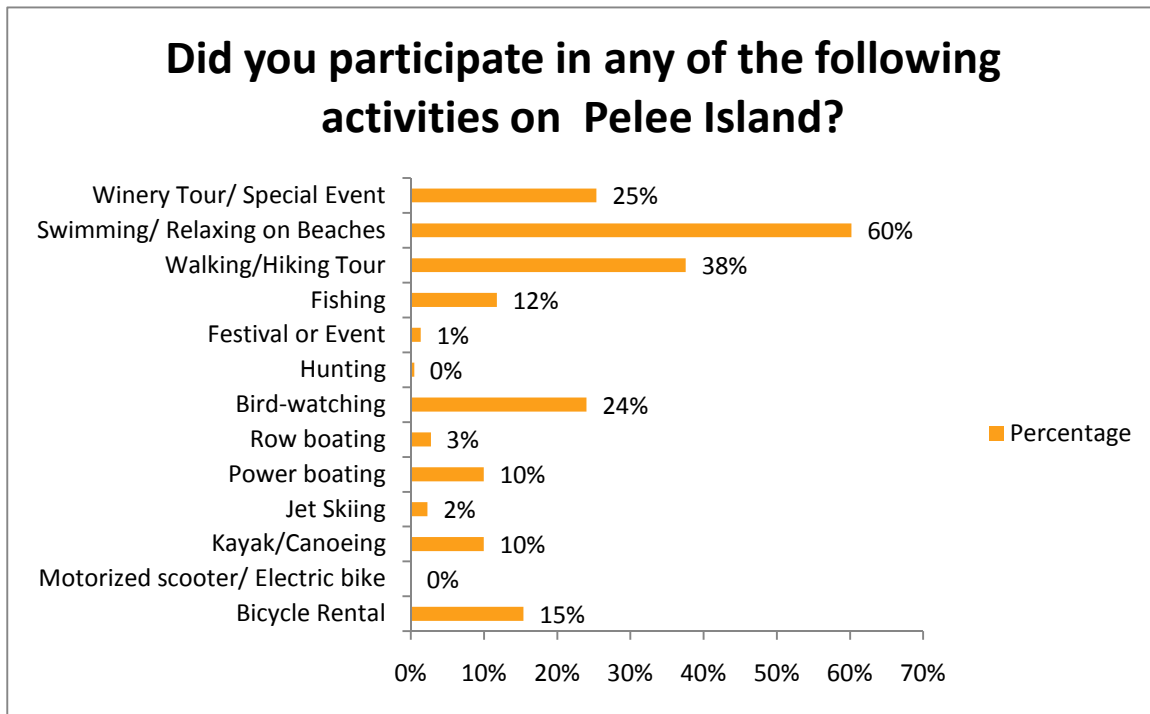
All of the individuals surveyed were then asked to identify from the following list of activities what they participated in while on Pelee Island:

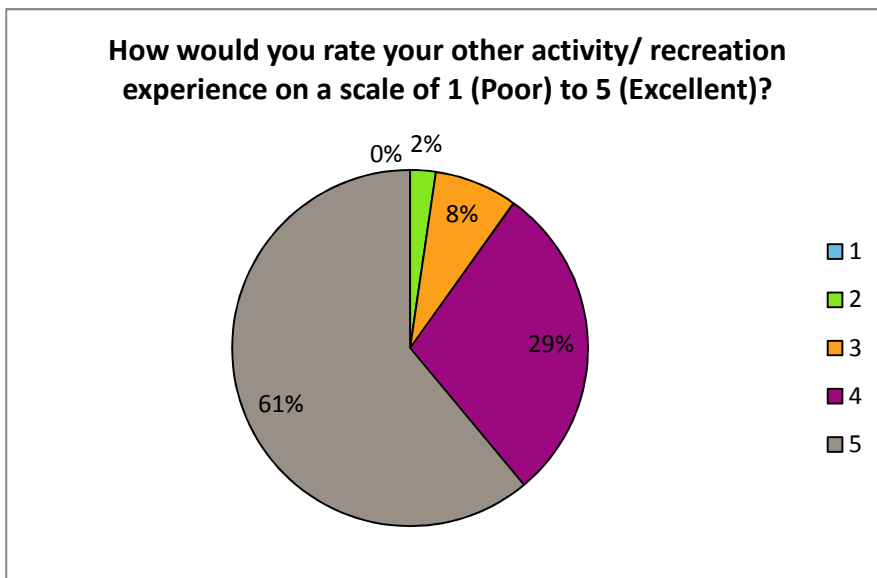
- Bicycle Rental
- Motorized scooter/Electric bike
- Kayak/Canoeing
- Jet skiing
- Power boating
- Bird watching
- Hunting
- Festival or Event
- Fishing
- Walking/Hiking Tour
- Swimming/Relaxing on beaches
- Winery tour/Special event

After identifying the activities that the respondents participated in, they were asked to rate the activities on a scale of 1 (poor) to 5 (excellent). **Exhibit 3-9** provides a summary of these responses. Overall, 60% of the individuals surveyed went swimming or relaxed on the beach, while 37.5% went on a walking/hiking tour of various attractions on the Island. 0% of respondents rented a motorized scooter or electric bike, 0.5% hunted and 1.4% attended a festival or event while on the Island. The majority of individuals rated the activities as 4 or 5.

It should be noted that the hunting season was not open during the survey period.

Exhibit 3-9 Activities Participated in during Trip to Pelee Island





3.1.9 Trip Spending

Exhibit 3-10 provides a summary of the average trip expenditures for the 221 respondents while on Pelee Island.

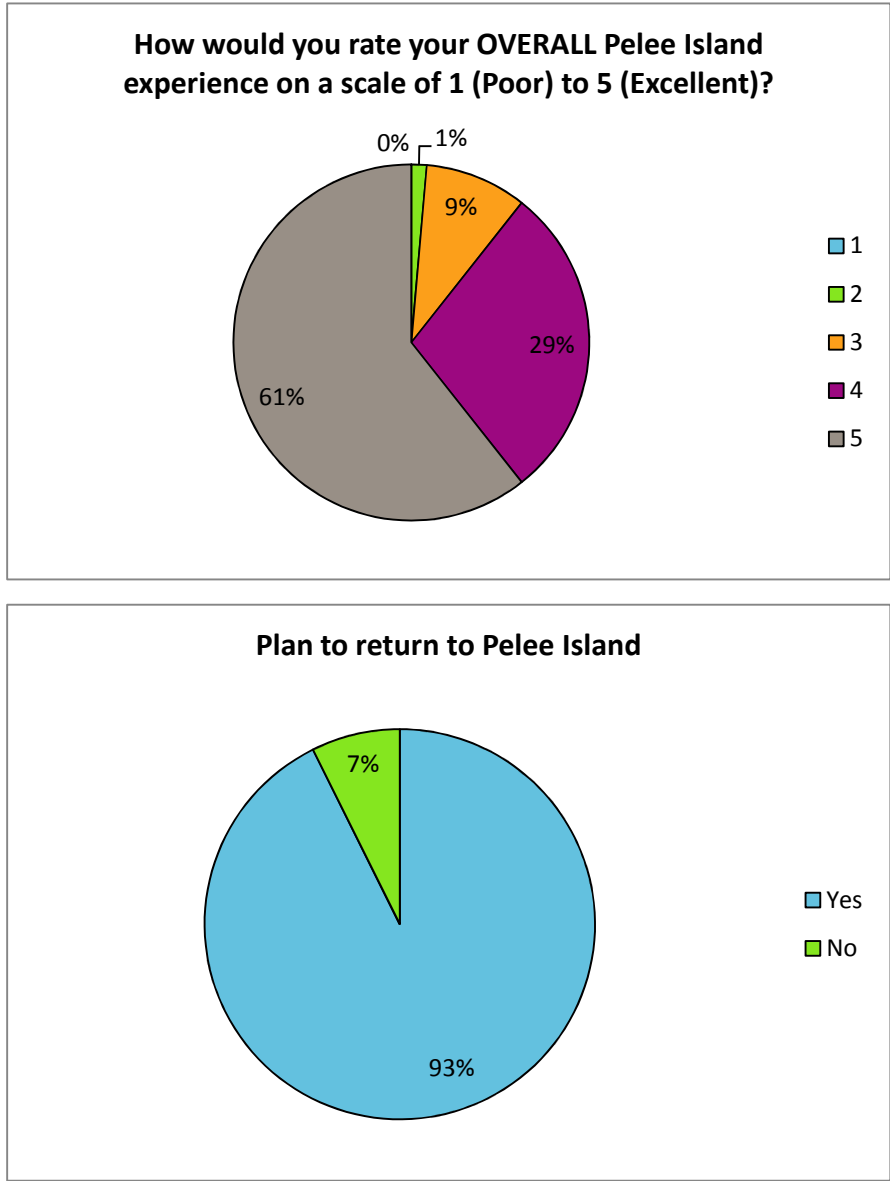
Exhibit 3-10 Tourist Travel Party Trip Spending While on Your Trip to Pelee Island

ITEM	AVERAGE AMOUNT SPENT PER AVERAGE TRAVEL PARTY (3.45 persons) PER AVERAGE VISIT (2.71 days)	AVERAGE SPENT PER TOURIST PER DAY
Accommodation	\$170	\$18.18
Food & Beverage at Restaurants/Bars	\$79	\$8.45
Food & Beverage at Stores	\$22	\$2.35
Vehicle Rental/Insurance	\$2	\$0.21
Vehicle Operation (i.e. fuel)	\$5	\$0.53
Local Transportation on Pelee Island	\$0	\$0
Ferry Fees	\$68	\$7.27
Sports, Recreation, and associated Rentals	\$4	\$0.43
Cultural & Entertainment Activities/Attractions	\$3	\$0.32
Other (souvenirs, shopping, photos, etc)	\$22	\$2.35
TOTAL	\$328	\$35.08

3.1.10 Overall Pelee Island Experience

The purpose of the last section of the survey was to establish the overall quality of the tourist experience for tourist travel parties as they were leaving the Island. **Exhibit 3-11** provides a summary of the responses received. Individuals were first asked how they would rate their overall Pelee Island experience on a scale of 1 (poor) and 5 (excellent). The majority of respondents rated their experiences as 4 or 5. Respondents were then asked if they plan to return to Pelee Island and 93% answered yes.

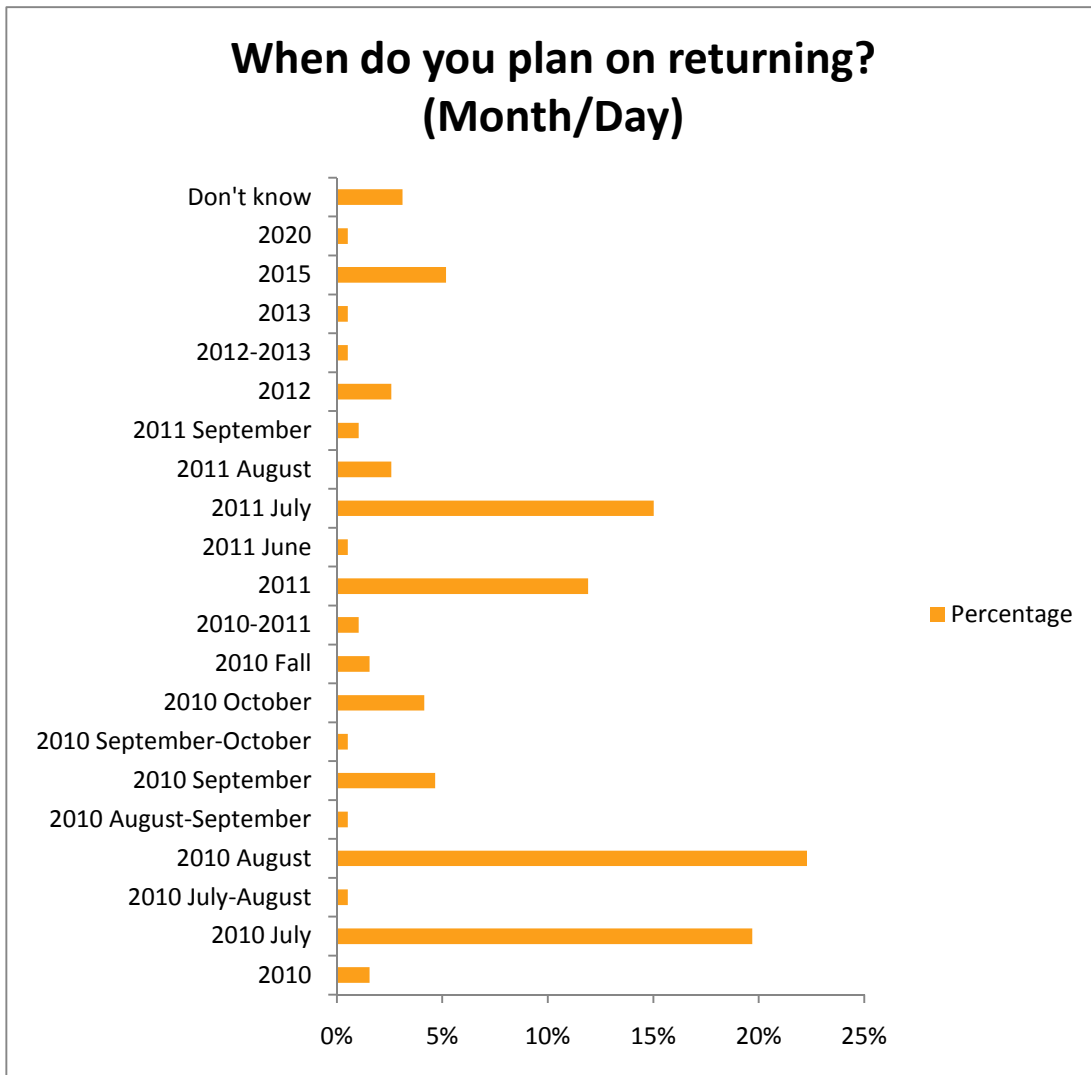
Exhibit 3-11 Overall Pelee Island Experience



3.1.10.1 Tourists Planning to Return to Pelee Island

The following **Exhibit 3-12** summarizes the estimated dates that respondents said that they would return to Pelee Island. A large portion of the respondents said that they would be returning in July 2010 (later that month), August 2010, or within the next year.

Exhibit 3-12 Approximate Return Dates of Respondents



3.1.10.2 Explanations Why Tourists will not be Returning to Pelee Island

The following summarizes the explanations of the 7% of respondents who said that they would not return to Pelee Island. The responses have been grouped together according to themes.

- **Planning Visit to the Island (Website/Brochure)**
 - Island needs to have better marketing such as better communication, internet capabilities/better websites, and a visitor centre that provides computer access and accurate maps.
 - Would come again if there was more information available. Not a lot marked on the map.
- **Tourist Information on the Island**
 - Island could use a tourist information centre at the entrance, and signage.
 - Not enough signage for the attractions.
- **Attractions on the Island**
 - Limited things to do on the Island. May consider coming for bird migration.
 - Not much to do on the Island.
 - Quiet, no reason to go back.
 - Island needs to clean dead fishes off beaches.
 - Flies were bad and there were water snakes on the beach.
 - No golfing on the Island.
- **Amenities**
 - No facilities at public beaches, so once you check out of bed & breakfast or motel you can't change if you go swimming.
 - The Island could use public washrooms at the attractions.
 - Won't return unless there are improvements. The Island needs public washrooms, picnic areas, BBQ (like Provincial Park) and more parking.
- **Ferry Schedule and Capacity**
 - Did not like ferry departure times and could not get car on the ferry due to capacity.
 - Not enough time to experience everything on the Island.
- **Visited Island as a 'one time' tourist**
 - Been and done. No need to return.
 - Going to try somewhere different.
 - We visited the Island and are going to see other touristy things.
 - Saw what we needed to see.
 - We can say that we've done it.
- **Other**
 - The Island is not child friendly
 - Would come back if it was not so expensive.
 - Paving the roads would improve the Island.

3.1.11 Additional Tourist Comments

In addition to the survey questions, a number of individuals provided additional comments on their tourism experience. The following is a summary of the comments that were received at the end of the survey.

- **Planning Visit to the Island (websites/brochures)**
 - Island needs better mapping.
 - Need to improve information on what to do on the Island.

- Advertising needs to be improved.
- Provide more information about Pelee Island on the ferry.

- ***Tourist Information on Island***
 - Need tourist signs on the Island.
 - There needs to be a centre or board to tell you what to do when you get off the boat.
 - The Island needs better signage on trails.
 - Would like more shopping (e.g. bottled water) and a tourist info centre.

- ***Attractions on the Island***
 - Need to improve beach maintenance
 - Lake was very smelly and there were no decent swimming areas.
 - Dead fish and litter on the beaches
 - Beaches by the co-op need to be raked.
 - Bugs are bad at the campground.
 - Flies on the Island were bad.

- ***Activities on the Island***
 - Need to let people know that you need a bike or car, because walking is not an option.
 - Island should consider horseback riding. Would only need car at the beginning and end of trip.
 - Would not come to the Island if no cars and if no cars on the Island.
 - The Island needs more recreation for kids and to be more kid friendly.

- ***Amenities***
 - Everything closes at 6:00 pm and the last ferry leaves the Island at 8:00 pm. Were told that everything was available on the Island.

- ***Dining and Eating on the Island***
 - Restaurants were high priced.
 - McCormicks Grocery Store has closed and there is no availability at Hoopers (likely means the Co-op Store).

- ***Ferry Schedule***
 - Would prefer an 8:00 am departure to Pelee Island.
 - Need an 8:00 am ferry on the schedule.
 - Wish the ferry would leave an hour earlier from the mainland.
 - Can't do day trips from Sandusky.

- ***Ferry Reservation and Cancellation Policies and Practices***
 - Could not get desired ferry time and had to take the later ferry.
 - Could not get car on ferry at 10 am departure to the Island and had to take the 12 noon departure from the Island (less time on the Island).
 - Was on standby Wednesday for emergency return.
 - Look at private ferry services and practices and consider augmenting ferry docking practices.

- ***Trip Fares***
 - Need to be consistent with ferry fees. Charged car price for golf cart when quoted as a motorcycle price and no senior's discount.
 - The ferry fees were expensive. We wouldn't come for a day trip again.

- **Pelee Island Ferry Systems Communication Process**
 - Need to update website with actual ferry sailing times.
 - Ferry schedule on the internet was not user friendly/clear.
 - Website wasn't clear about booking car.
- **Other**
 - \$50,000 US fine if caught bringing your own boat back to the United States, without using proper border crossing services.

3.2 Tourism Experience Survey Results Based Upon Category of Tourist Travel Party

The following section provides a further analysis and summary of the findings for the following key areas:

- Average Single Day Tripper
- Average One or Two Night Visitor to the Island
- Average Cottage Renter
- Average Cottager / Second Home
- Average One-Time Visitor During Last Year
- Average Five to 10 Time Visitor During Last Year
- Average More than 10 Time Visitor During Last Year
- Average Cyclist.

The purpose of this section is to provide an understanding of the various tourists visiting Pelee Island, with specific interest in their:

- Place of Residence
- Travel Party Size
- Source of Tourist Information
- Reason for Visit
- Attraction Visited While on Pelee Island
- Activities Participated in While on Pelee Island
- Trip Spending.

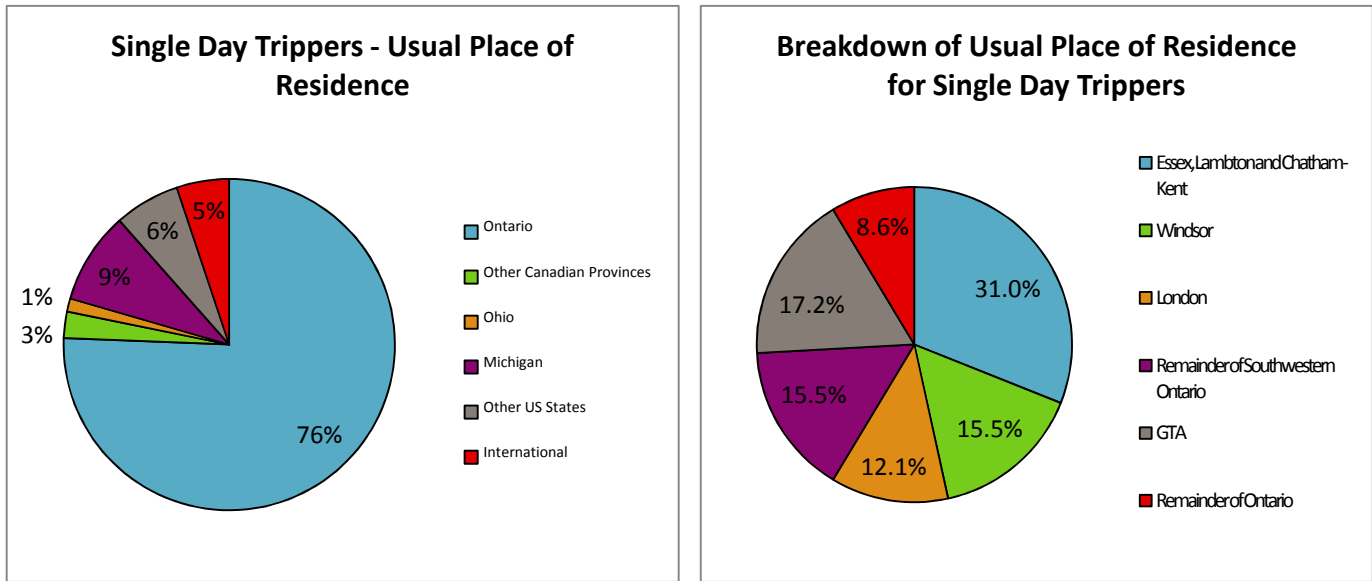
3.2.1 Average Single-Day Tripper

The Average Single-Day Tripper represents 78 of the 221 surveys completed. The average group size of the Single-Day Tripper was 3.58 people.

Place of Residence

Exhibit 3-13 provides breakdown of the Usual Place of Residence for Single Day Trippers. For Single Day Trippers visiting Pelee Island, 76% came from Ontario, 9% from Michigan, 6% came from other US States and 5% came from International destinations. Of the 76% that came from Ontario, 31% were from the counties of Essex, Lambton or Chatham-Kent, 17.2% were from the GTA, and Windsor and the remainder of southwestern Ontario each had 15.5%.

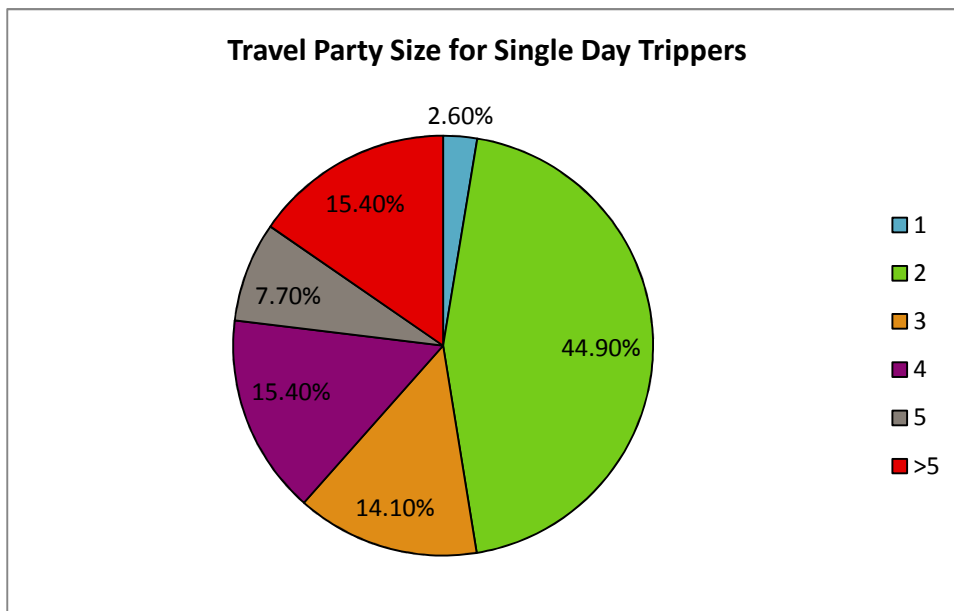
Exhibit 3-13 Single Day Trippers – Usual Place of Residence



Travel Party Size

Exhibit 3-14 shows that 44.9% of Single Day Trippers came to Pelee Island in a travel party size of two (2). Travel party sizes of four (4) and more than five (5) each represented 15.4% and 14.10% came in travel party sizes of three.

Exhibit 3-14 Travel Party Size for Single Day Trippers

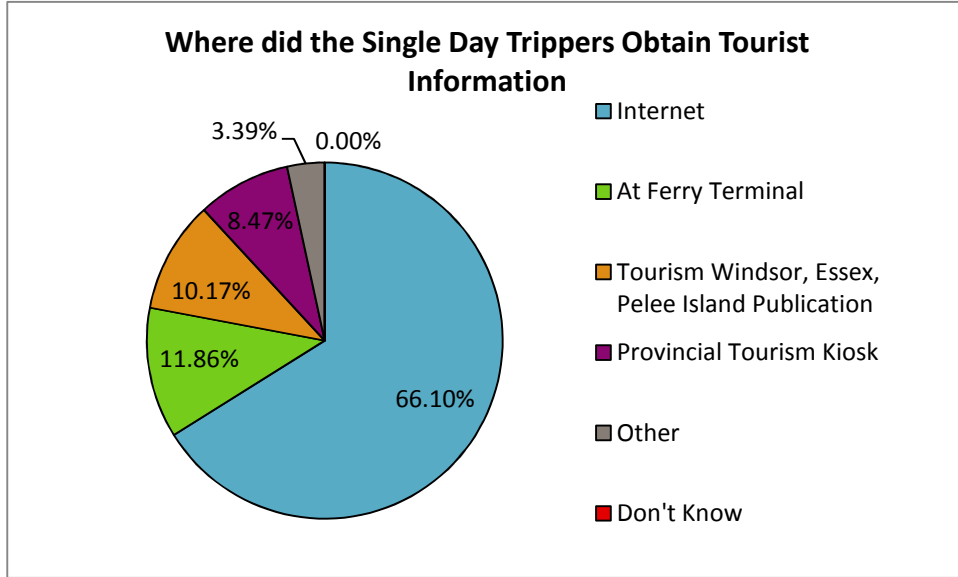


Source of Tourist Information

Out of the Single Day Tripper respondents 66% obtained their tourist information from the Internet, 11.86% obtained their information at the ferry terminal and 10.17% obtained their information from a Tourism Windsor, Essex, Pelee

Island Publication (**Exhibit 3-15**). This response varies from the overall survey findings in Section 3.1 where 77% of respondents found their information on the internet.

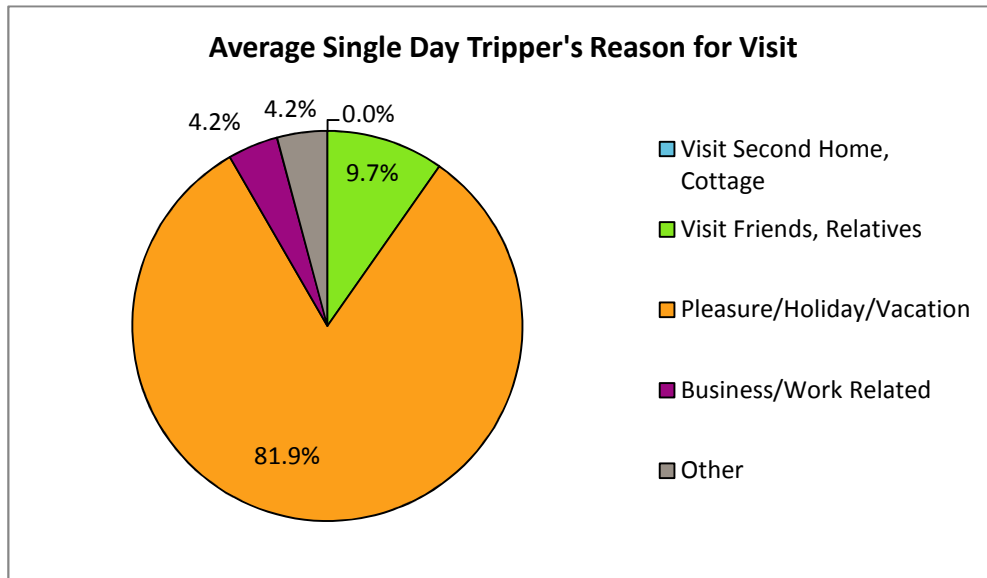
Exhibit 3-15 Tourist Information for Single Day Trippers



Reason for Visit

As shown in **Exhibit 3-16**, 81.9% of Single Day Trippers chose pleasure/holiday/vacation as their reason for visiting Pelee Island, 0% chose visiting their second home or cottage as their reason for visiting Pelee Island.

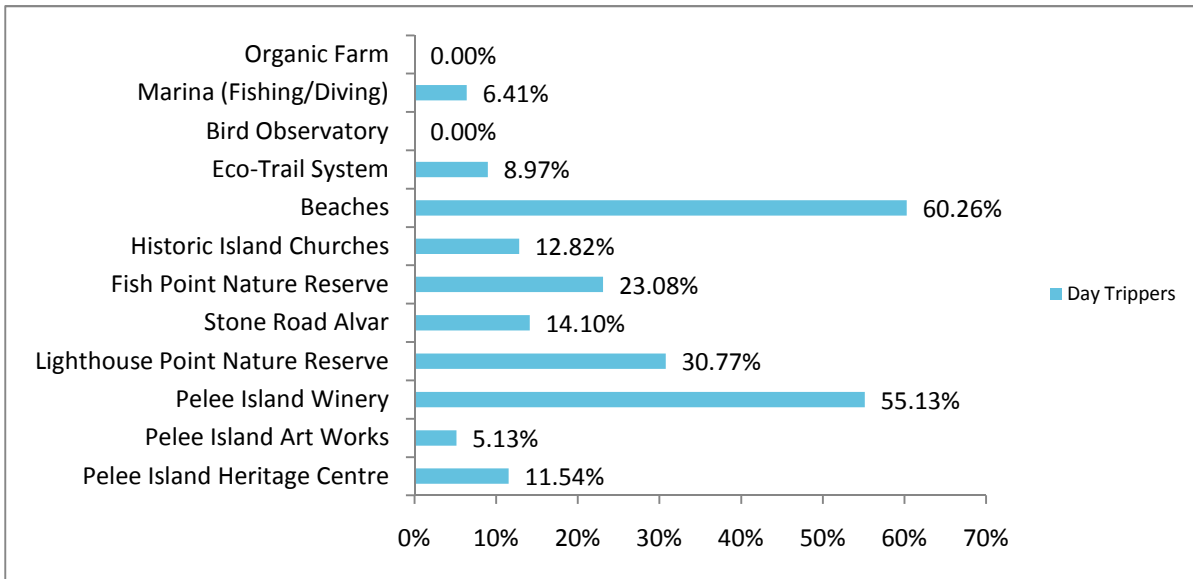
Exhibit 3-16 Average Single Day Tripper's Reason for Visit



Attractions Visited While on Pelee Island

While on Pelee Island, 60.26% of Single Day Trippers visited the beaches, 55.13% visited the Pelee Island Winery and 30.77% visited the Lighthouse Point Nature Reserve (shown in **Exhibit 3-17**). Visitations to the beaches and Pelee Island Winery correspond with the overall survey findings.

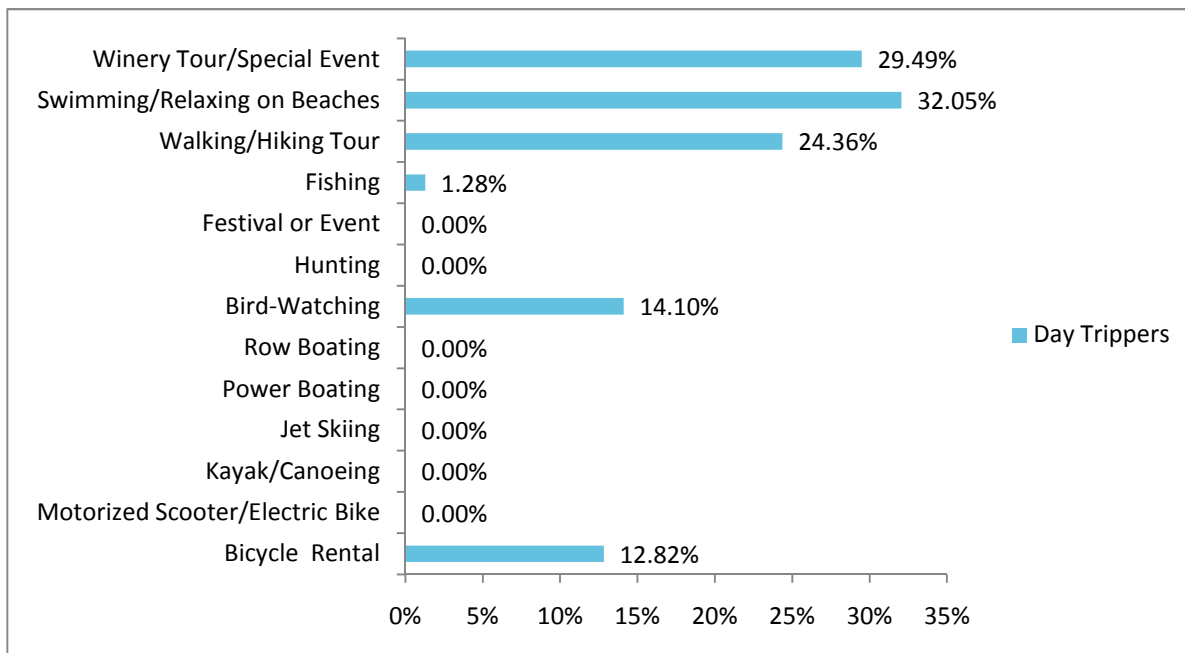
Exhibit 3-17 Attractions on Pelee Island Visited by Single Day Trippers



Activities Participated In While on Pelee Island

While on Pelee Island, **Exhibit 3-18** shows that day trippers participated in swimming/relaxing on beaches (32.05%), winery tour/special event (29.49%), and a walking/hiking tour (24.36%).

Exhibit 3-18 Activities Participated in by Single Day Trippers while Visiting Pelee Island



Trip Spending by Single Day Trippers

Overall, Single Day Tripper travel parties spent an average of \$122.52 while on Pelee Island (with an average party size of 3.58 people). The average spending per person was \$34.22.

Expense Type	Average Spending per Group (3.58 people)	Average Spending Per Person
Accommodation	\$ 1.79	\$ 0.50
Food & Beverage at Restaurants/Bars	\$ 38.96	\$ 10.88
Food & Beverage at Stores	\$ 4.78	\$ 1.34
Vehicle Rental/Insurance	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 0	\$ 0
Local Transportation on Pelee Island	\$ 0.15	\$ 0.04
Ferry Fees	\$ 54.96	\$ 15.35
Sports, Recreation and associated Rentals	\$ 3.15	\$ 0.88
Cultural & Entertainment Activities/Attractions	\$ 5.24	\$ 1.46
Other (souvenirs, shopping, photos, etc)	\$ 10.42	\$ 2.91
TOTAL	\$ 122.52	\$ 34.22

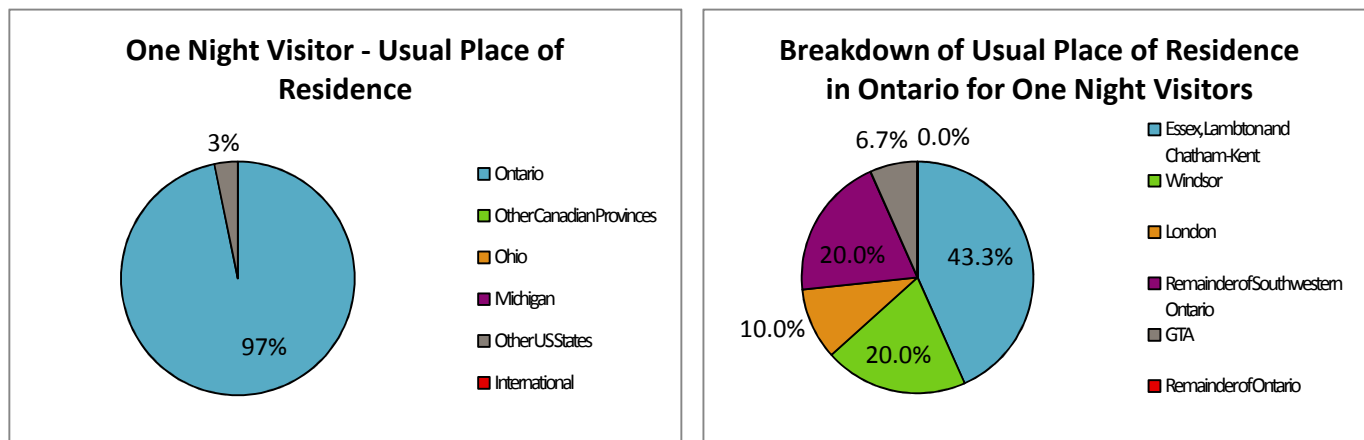
3.2.2 Average One and Two Night Visitor to the Island

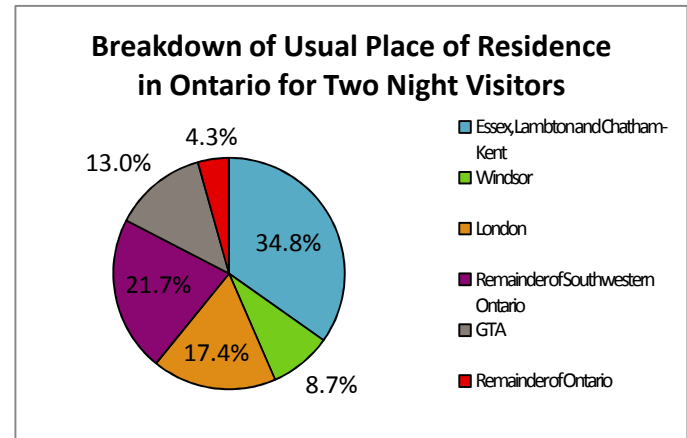
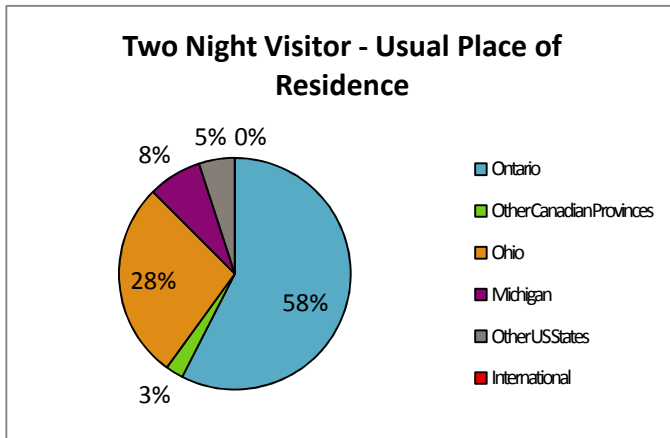
The Average One Night Visitor represented 31 of the 221 surveyed, with an average group size of 3.03 people. The Average Two Night Visitor represented 40 of the 221 surveyed, with an average group size of 3.2 people.

Place of Residence

Exhibit 3-19 provides the Usual Place of Residence for the One and Two Night Stay Visitors. For One Night Visitors, 97% were from Ontario, where 43.3% of this percentage was from the counties of Essex, Lambton and Chatham-Kent. For Two Night Visitors 58% were from Ontario and 28% were from Ohio, of the visitors from Ontario 34.8% were from the counties of Essex, Lambton and Chatham-Kent and 21.7% were from the remainder of southwestern Ontario.

Exhibit 3-19 Average One and Two Night Stay Visitors – Usual Place of Residence

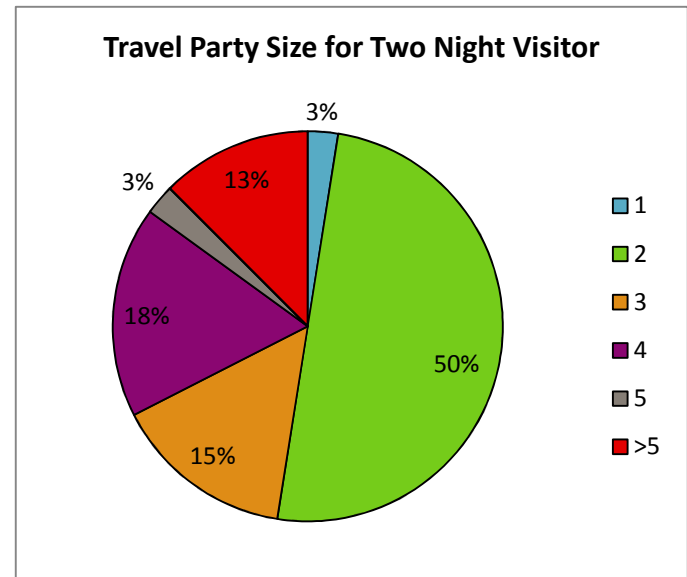
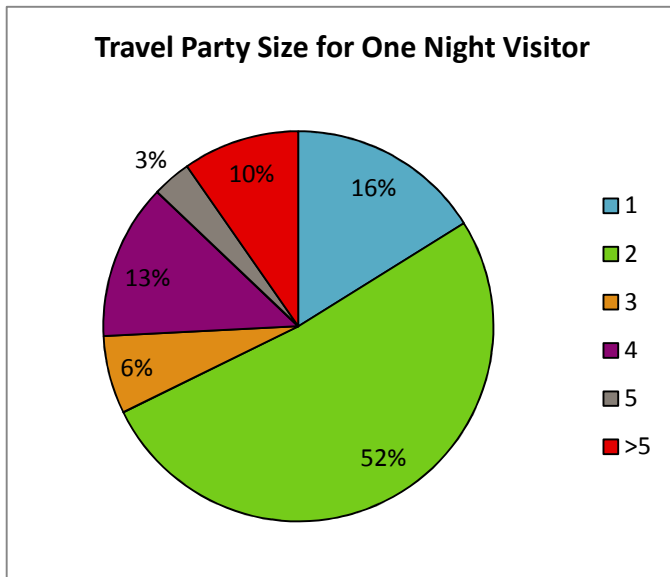




Travel Party Size

Exhibit 3-20 provides the travel party sizes for One and Two Night Visitors to Pelee Island. For One Night Visitors, 52% were travel party sizes of two (2), 16% were travel party sizes of one (1) and 13% were travel party sizes four (4). For Two Night Visitors, 50% were travel party sizes of two (2), 18% were travel party sizes of four (4) and 15% were travel party sizes of three (3).

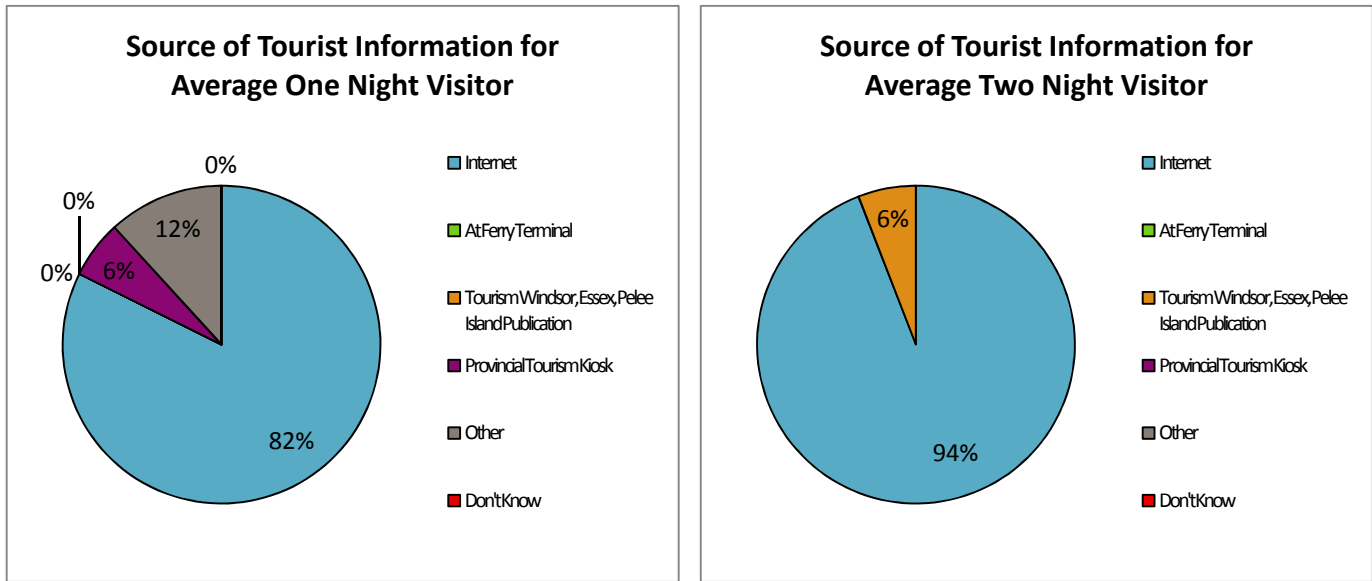
Exhibit 3-20 Travel Party Size for One and Two Night Visitors on Pelee Island



Source of Tourist Information

Exhibit 3-21 provides a breakdown of tourist information sources for One and Two Night Visitors. For parties staying one night, 82% of information was found on the internet and 12% was found from other sources. For parties staying two nights, 94% of tourist information was found on the internet and 6% was found from Tourism Windsor, Essex, Pelee Island Publication.

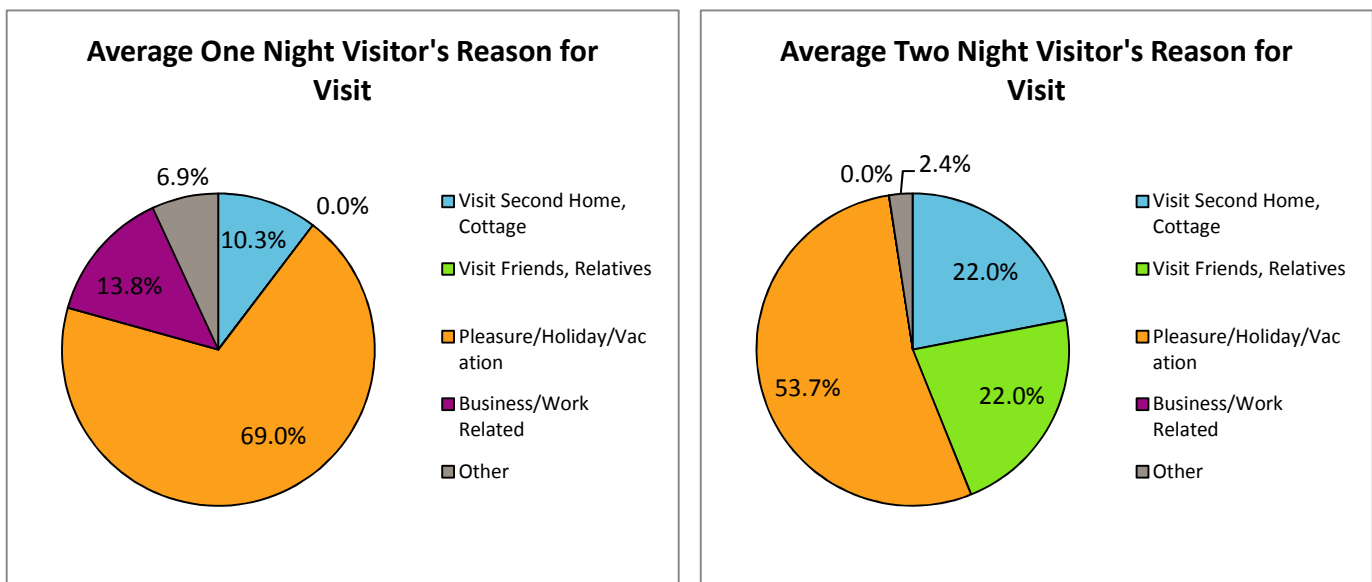
Exhibit 3-21 Tourist Information for Average One and Two Night Visitors



Reason for Visit

As shown in **Exhibit 3-22**, the Average One Night Visitor, 69% came to Pelee Island for Pleasure/Holiday/Vacation, while only 13.8% came for Business/Work Related and 10.3% came to visit a Second Home, Cottage. For the Average Two Night Visitor, 53.7% came to Pelee Island for Pleasure/Holiday/Vacation and 22% came to the Pelee Island to visit a Second Home, Cottage and also to visit Friends, Relatives.

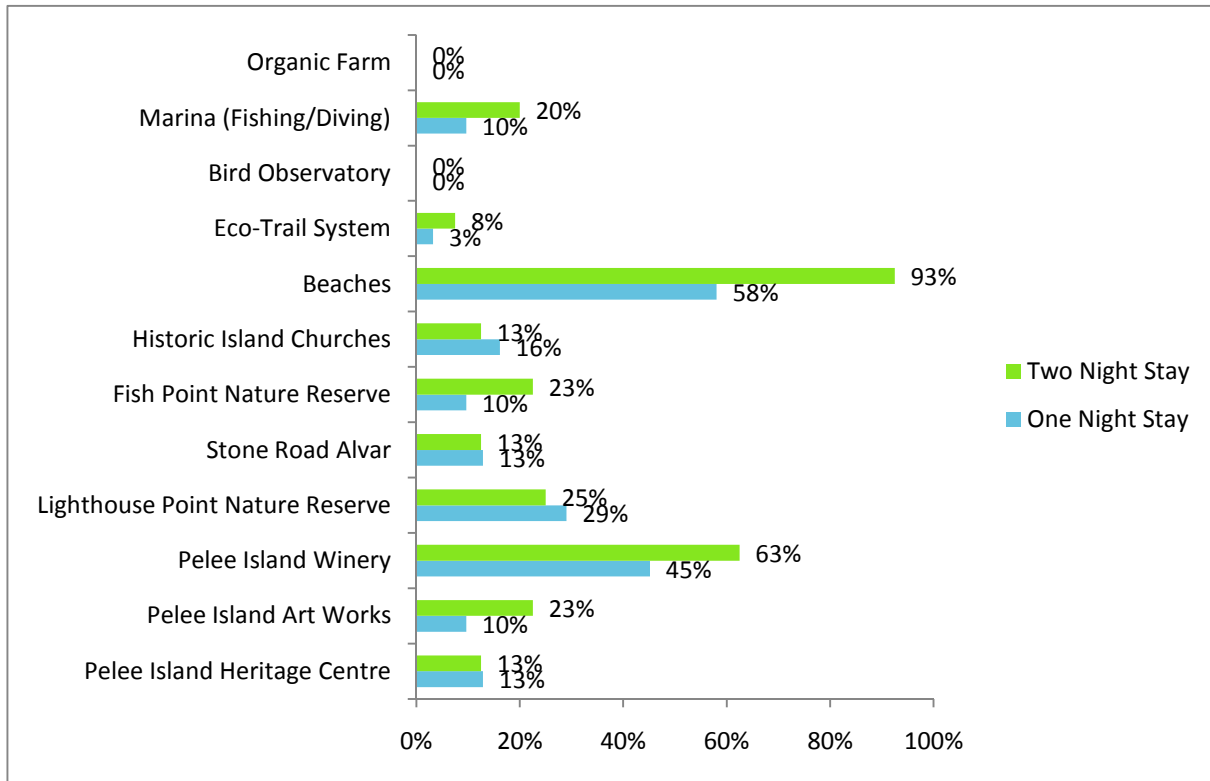
Exhibit 3-22 Average One and Two Night Visitor's Reason for Visit



Attractions Visited While on Pelee Island

Exhibit 3-23 provides a summary of the attractions that Average One and Two Night Visitors visited while on Pelee Island. For One Night Visitors, 58% went to the beaches, 45% went to the Pelee Island Winery and 29% went to the Lighthouse Point Nature Reserve. For Two Night Visitors, 93% went to the beaches, 63% went to the Pelee Island Winery and 25% went to the Lighthouse Point Nature Reserve.

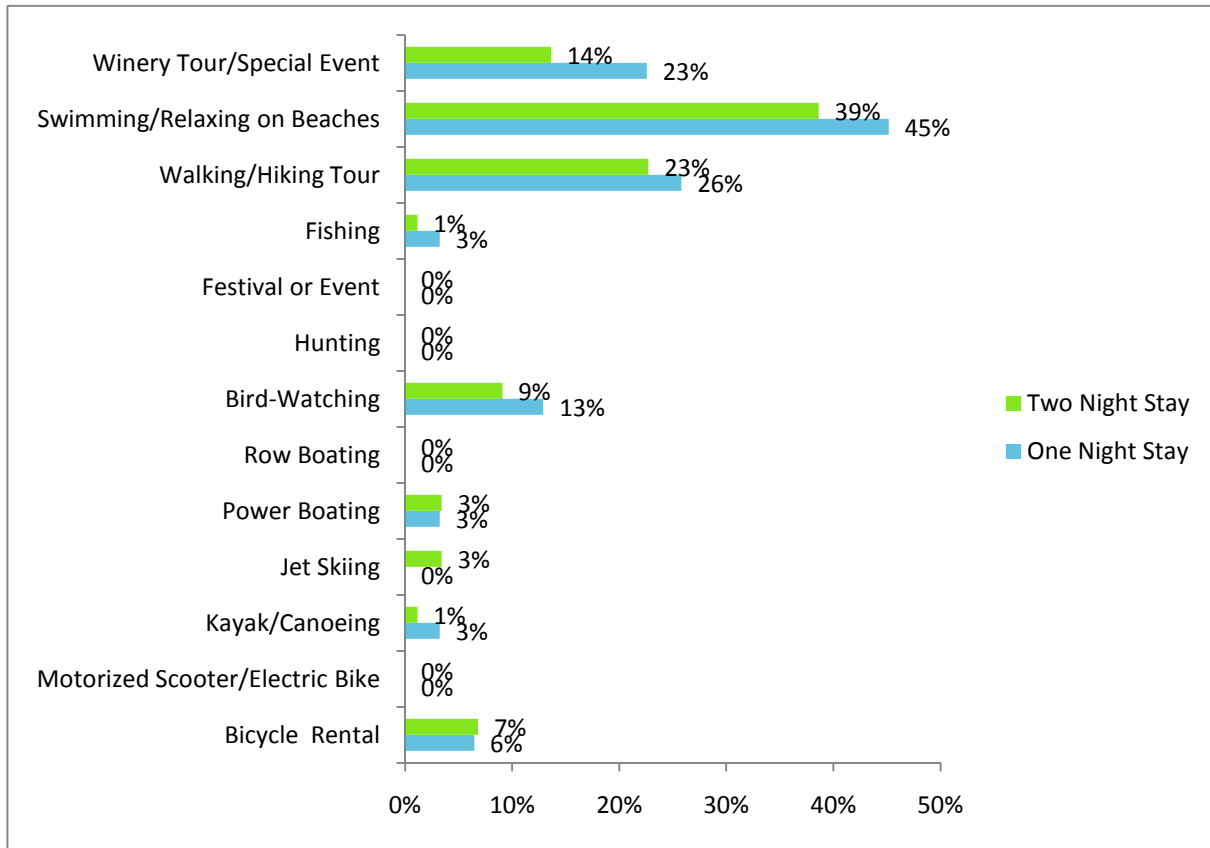
Exhibit 3-23 Attractions Visited by Average One and Two Night Visitors



Activities Participated In While on Pelee Island

For One Night Visitors, 45% swam and relaxed on the beaches, 26% went on a walking/hiking tour, and 23% went on a winery tour/special event (**Exhibit 3-24**). For Two Night Visitors, 39% swam and relaxed on the beaches, 23% went on a walking/hiking tour, and 14% went on a winery tour/special event (**Exhibit 3-24**).

Exhibit 3-24 Activities Participate in by Average One and Two Night Visitors While on Pelee Island



Trip Spending for Average One and Two Night Visitors

Overall, One Night Visitors spending per group was \$235.56 while on Pelee Island. For Two Night Visitors, overall spending while on Pelee Island was \$349.06.

Expense Type	Average Spending per Group (3.03 people) for One Night Stay	Average Spending Per Person for One Night Stay	Average Spending per Group (3.2 people) for Two Night Stay	Average Spending Per Person for Two Night Stay
Accommodation	\$ 91.87	\$ 30.32	\$151.25	\$47.27
Food & Beverage at Restaurants/Bars	\$ 48.94	\$ 16.15	\$96.75	\$30.23
Food & Beverage at Stores	\$ 8.29	\$ 2.74	\$10.16	\$3.18
Vehicle Rental/Insurance	\$ 6.13	\$ 2.02	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 0	\$ 0	\$ 3.65	\$1.14
Local Transportation on Pelee Island	\$ 0	\$ 0	0	\$ 0
Ferry Fees	\$ 58.42	\$ 19.28	\$ 70.16	\$21.93
Sports, Recreation and associated Rentals	\$ 0	\$ 0	0	\$ 0

Expense Type	Average Spending per Group (3.03 people) for One Night Stay	Average Spending Per Person for One Night Stay	Average Spending per Group (3.2 people) for Two Night Stay	Average Spending Per Person for Two Night Stay
Cultural & Entertainment Activities/Attractions	\$ 0	\$ 0	\$ 2	\$0.62
Other (souvenirs, shopping, photos, etc)	\$ 23.05	\$ 7.61	\$15.08	\$4.71
TOTAL	\$ 235.56	\$ 77.74	\$ 349.06	\$109.08

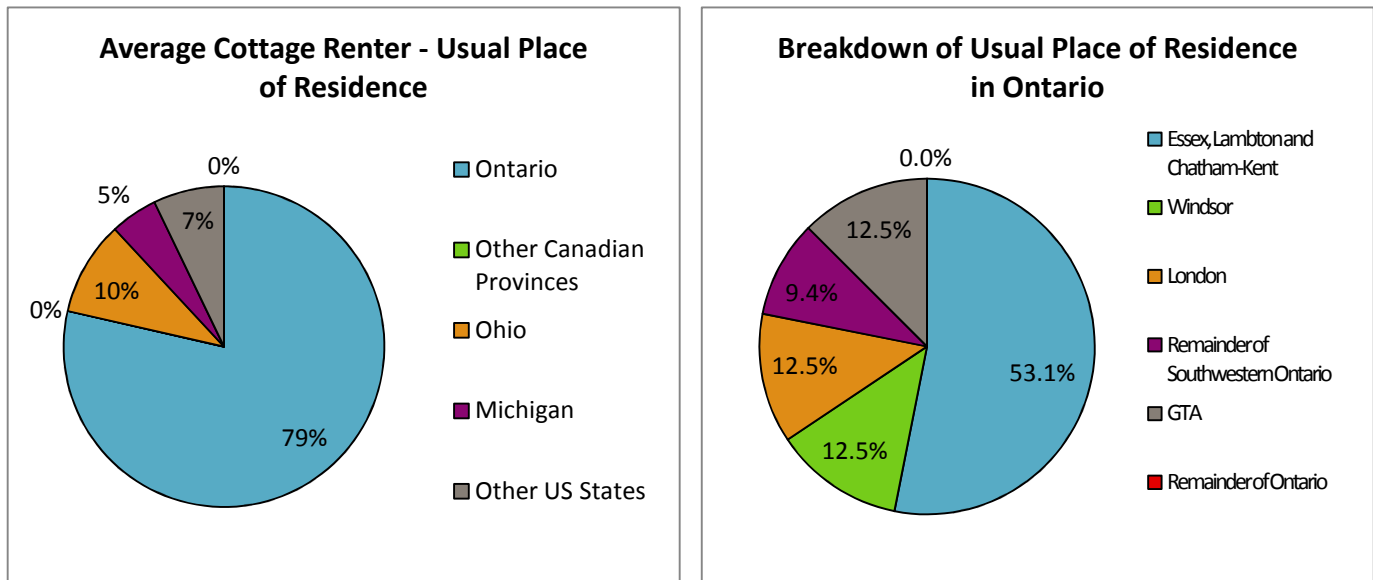
3.2.3 Average Cottage Renter

The Average Cottage Renter represented 42 of the 221 surveyed. The average group size was 5.26 people and the average length of stay was 5.5 days.

Place of Residence

Exhibit 3-25 shows that 79% of the Average Cottage Renters were from Ontario and 10% were from Ohio. Of the percentage from Ontario, 53.1% were from the counties of Essex, Lambton and Chatham-Kent, and Windsor, London and the GTA each represented 12.5%.

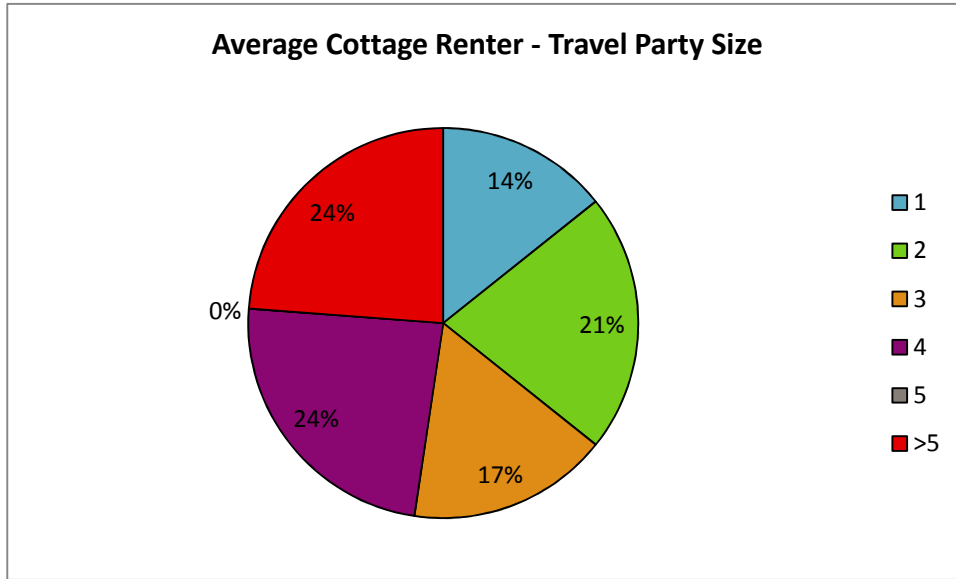
Exhibit 3-25 Average Cottage Renter Usual Place of Residence



Travel Party Size

The travel party size for the Average Cottage Renter was spread out evenly with party sizes greater than five (5) and travel party sizes of four (4) each representing 24% (**Exhibit 2-36**). Travel party sizes of two (2) made up 21% of Cottage Renters and travel party sizes of three (3) made up 17%.

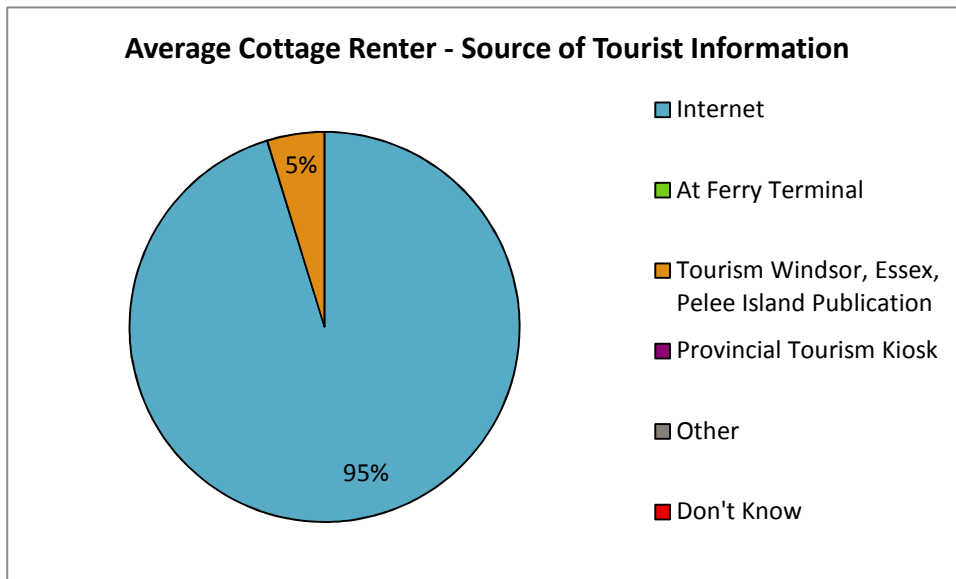
Exhibit 3-26 Average Cottage Renter Travel Party Size



Source of Tourist Information

As shown in **Exhibit 3-27**, 95% of the Average Cottage Renter obtained their tourist information from the internet.

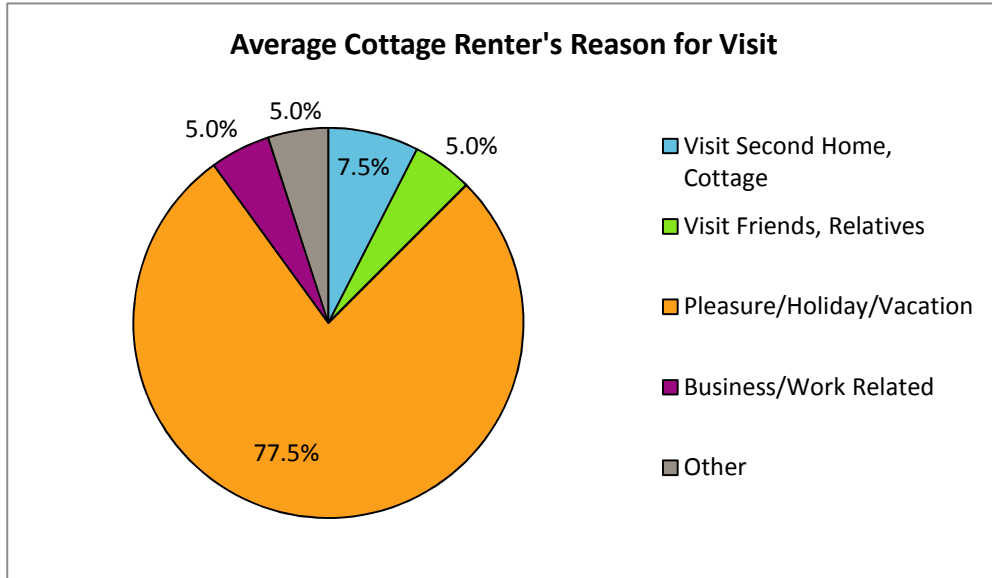
Exhibit 3-27 Source of Tourist Information for the Average Cottage Renter



Reason for Visit

In **Exhibit 3-28**, 77.5% of Average Cottage Renter’s came to Pelee Island for pleasure/holiday/vacation.

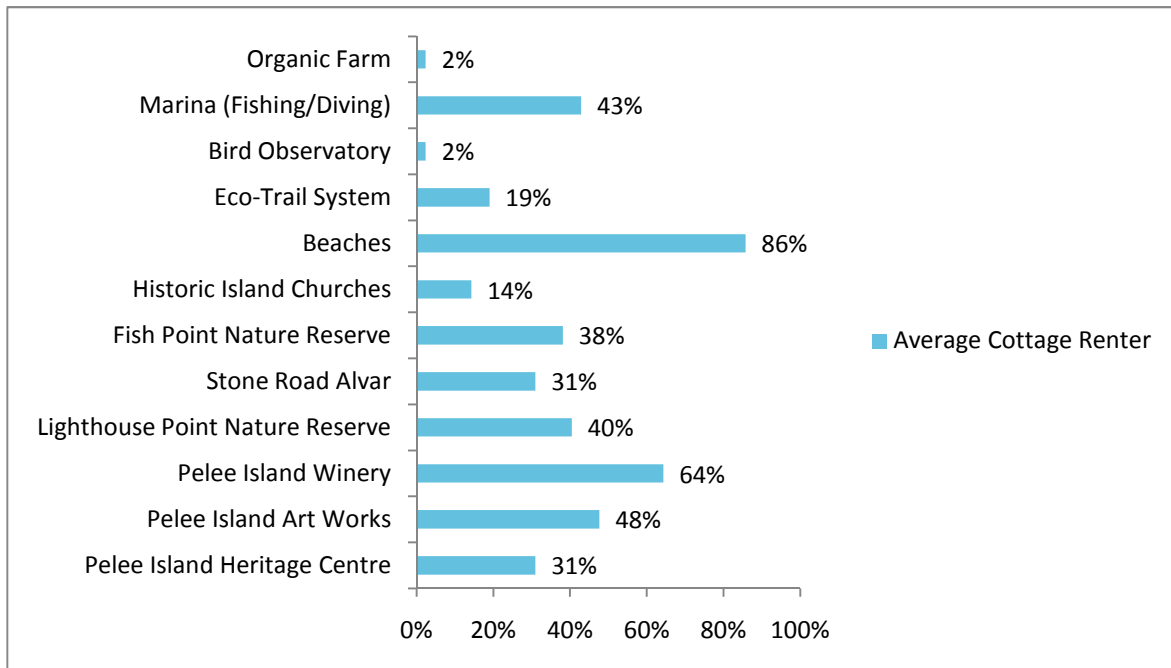
Exhibit 3-28 Average Cottage Renter’s Reason for Visit



Attractions Visited

Exhibit 3-29 shows that 86% of Average Cottage Renter visited the beaches, 64% went to the Pelee Island Winery, 48% went to Pelee Island Art Works and 43% went to the Marina.

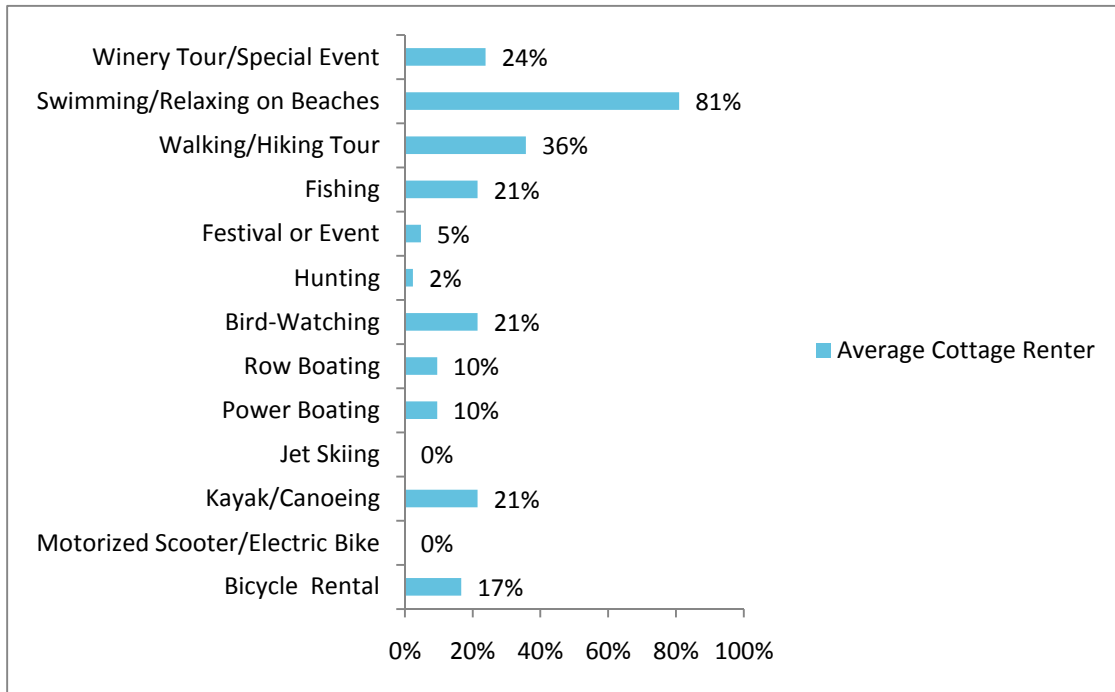
Exhibit 3-29 Attractions Visited While on Pelee Island by Cottage Renters



Activities Participated In

As shown in **Exhibit 3-30**, the most common activity participated in by the Average Cottage Renter was swimming/relaxing on the beaches.

Exhibit 3-30 Activities Participated in by the Average Cottage Renter While on Pelee Island



Trip Spending

Overall, the Average Cottage Renter spent \$507.50 per group on accommodation and \$802.05 per visit. The average spending per person per day was \$27.72.

Expense Type	Average Spending per Group (5.26 people / 5.5 days)	Average Spending Per Person Per Day
Accommodation	\$ 507.50	\$ 17.50
Food & Beverage at Restaurants/Bars	\$ 99.93	\$ 3.45
Food & Beverage at Stores	\$ 43.19	\$ 1.49
Vehicle Rental/Insurance	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 7.26	\$ 0.25
Local Transportation on Pelee Island	\$ 0	\$ 0
Ferry Fees	\$ 88.31	\$ 0.09
Sports, Recreation and associated Rentals	\$ 1.07	\$ 0.04
Cultural & Entertainment Activities/Attractions	\$ 1.79	\$ 0.06
Other (souvenirs, shopping, photos, etc)	\$ 23.12	\$ 0.80
TOTAL	\$ 802.05	\$ 27.72

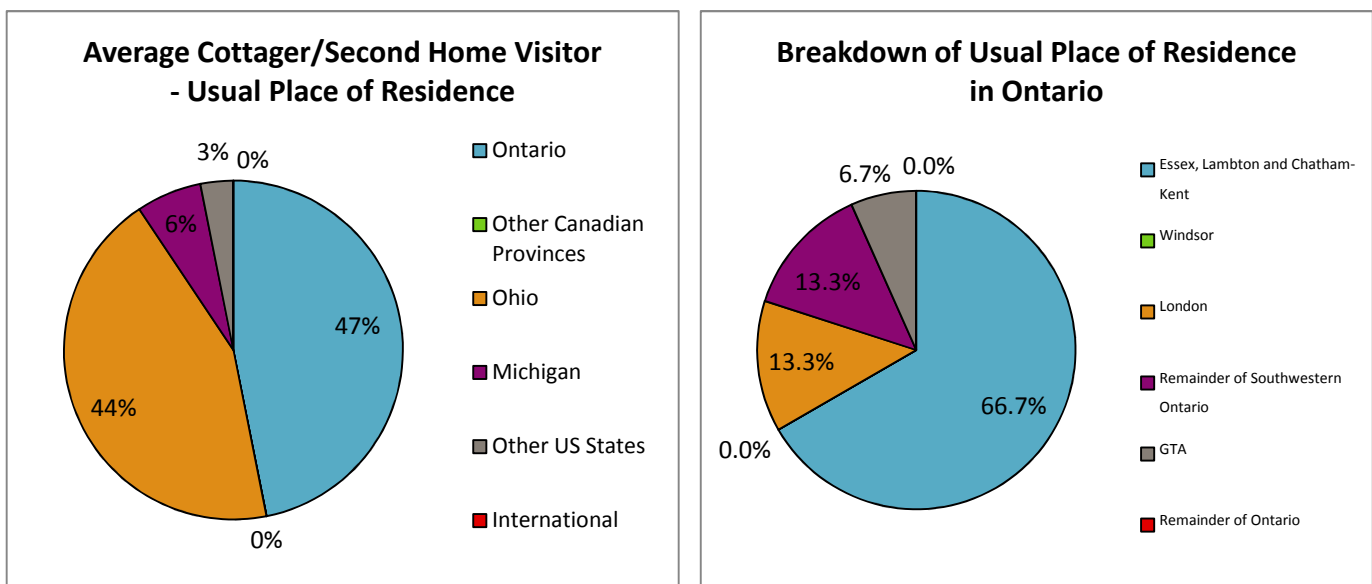
3.2.4 Average Cottager/Second Home

The Average Cottager/Second Home visitor represented 32 of the 221 surveyed. The average group was 3.13 people and the average length of stay was 3.91 days.

Place of Residence

Exhibit 3-31 shows that 47% of the Average Cottage/Second Home visitors were from Ontario, while 44% were from Ohio. Of the 47% of Cottage/Second Home owners, 66.7% were from the counties of Essex, Lambton and Chatham-Kent.

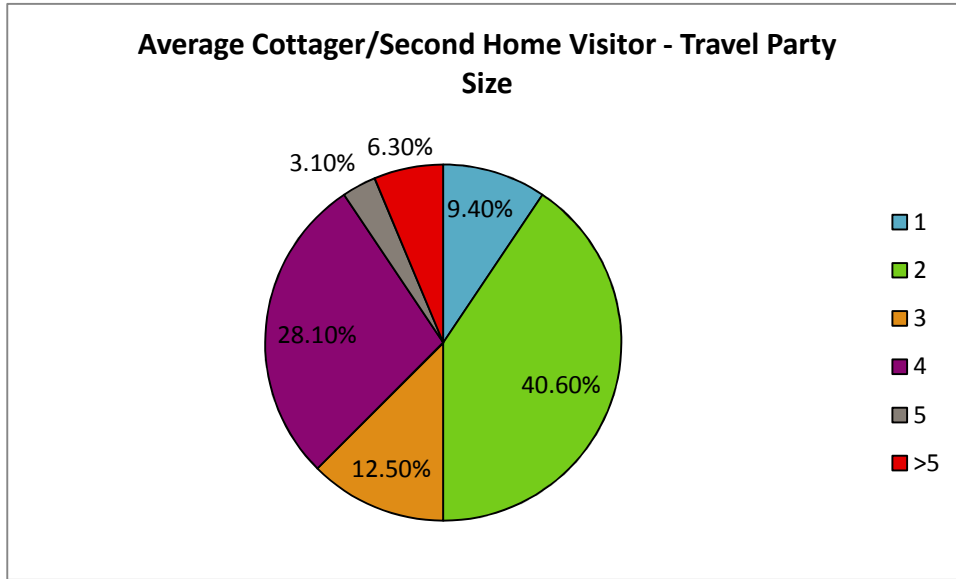
Exhibit 3-31 Average Cottager/Second Home Visitor – Usual Place of Residence



Travel Party Size

Exhibit 3-32 displays the travel party size for the Average Cottager/Second Home Visitor who came to Pelee Island. 40.6% of Second Home, Cottage owners came in a travel party size of two (2), while 28.1% came in a travel party size of four (4).

Exhibit 3-32 Average Cottager/Second Home Visitor Travel Party Size



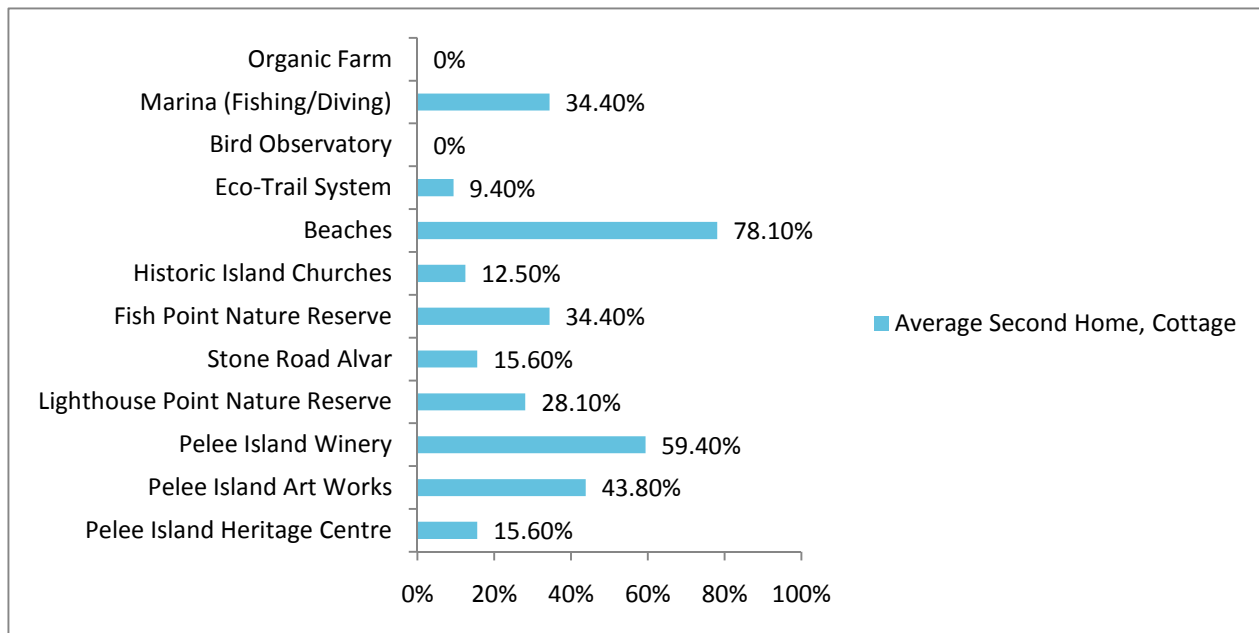
Source of Tourist Information

100% of Cottager/Second Home Visitors found their tourist information on the internet (based on two (2) responses).

Attractions Visited

As shown in **Exhibit 3-33**, 78.1% of Cottager/Second Home Visitors went to the beaches, 59.4% visited the Pelee Island Winery and 43.8% went to the Pelee Island Art Works.

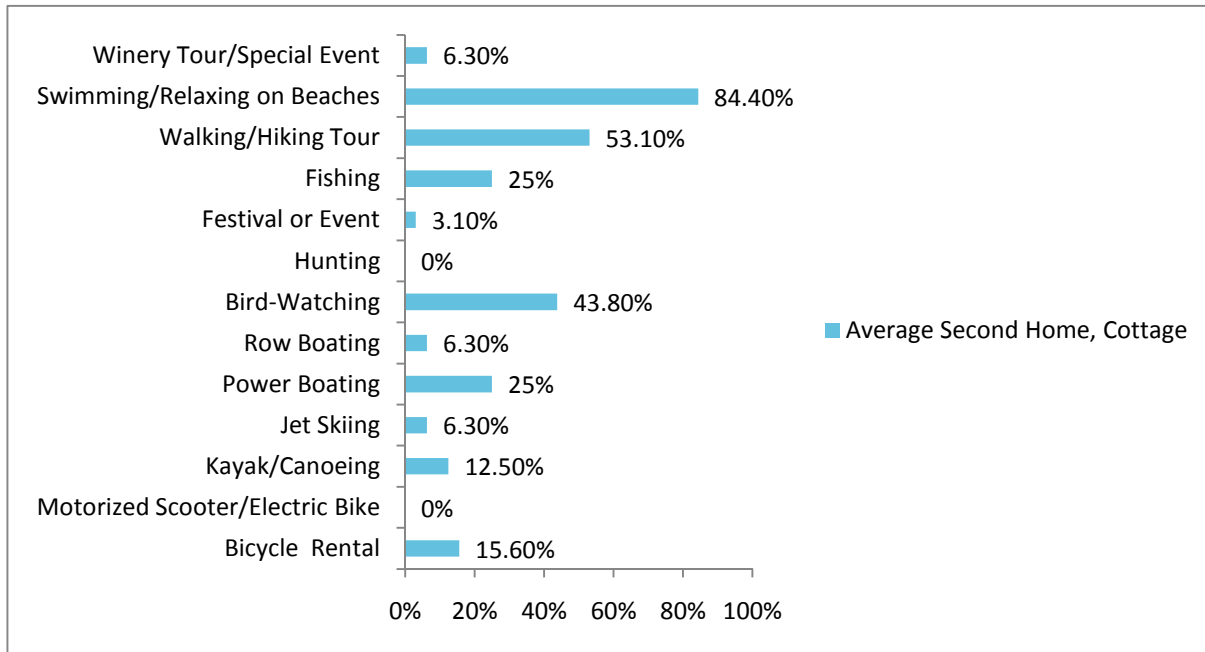
Exhibit 3-33 Attractions Visited by Cottager/Second Home While on Pelee Island



Activities Participated In

As shown in **Exhibit 3-34**, 84.8% of Cottager/Second Home Visitors went swimming and relaxed on beaches, 53.1% went on a walking/hiking tour and 43.8% bird watched.

Exhibit 3-34 Activities Participated in by Cottager/Second Home Visitors While on Pelee Island



Trip Spending

Overall, the average Cottager/Second Home Visitor spent \$205.60 per group per visit. The average spending per person per day was \$16.80.

Expense Type	Average Spending per Group (3.13 people / 3.91 days)	Average Spending Per Person Per Day
Accommodation	\$82.80	\$6.76
Food & Beverage at Restaurants/Bars	\$75.20	\$6.14
Food & Beverage at Stores	\$49.70	\$4.06
Vehicle Rental/Insurance	\$0	\$0
Vehicle Operation (i.e. fuel)	\$15.90	\$1.30
Local Transportation on Pelee Island	\$0	\$0
Ferry Fees	\$77.00	\$6.29
Sports, Recreation and associated Rentals	\$0	\$0
Cultural & Entertainment Activities/Attractions	\$2.80	\$0.23
Other (souvenirs, shopping, photos, etc)	\$25.60	\$2.09
TOTAL	\$205.60	\$16.80

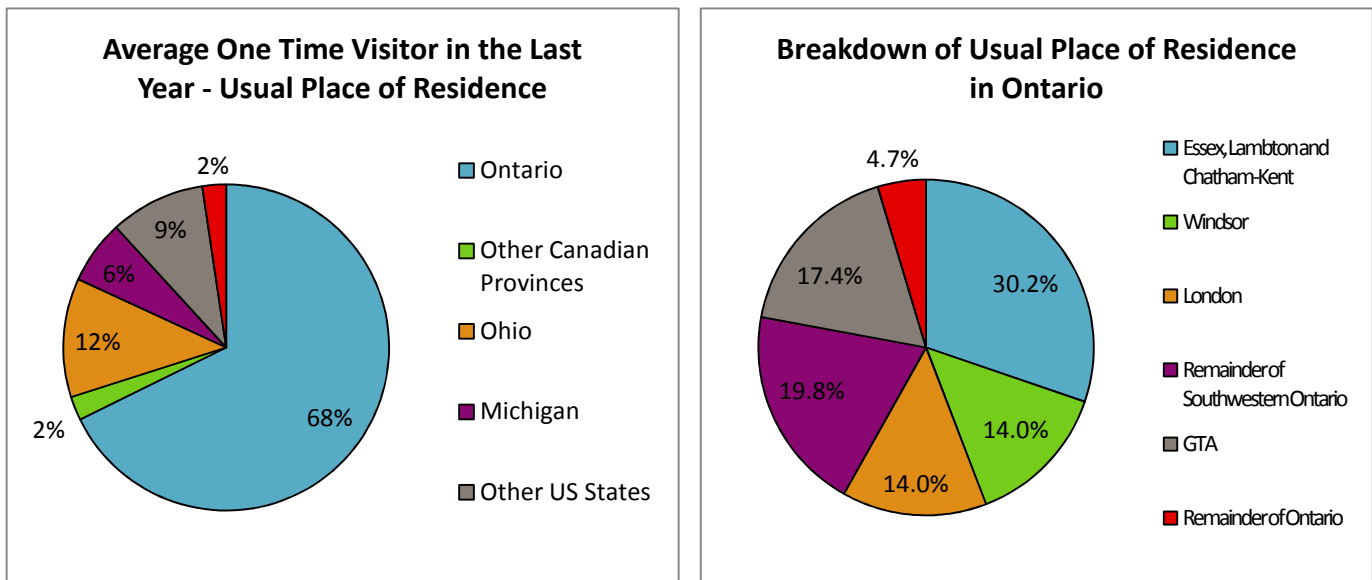
3.2.5 Average One-Time Visitor in the Last Year

The Average One-Time Visitor in the Last Year represented 127 of the 221 surveyed. The average group was 3.57 people and the average length of stay was 2.48 days.

Place of Residence

Out of the individuals who were One Time Visitors in the Last Year, 68% were from Ontario and 12% were from Ohio (**Exhibit 3-35**). Of the 68% of One Time visitors from Ontario, 30.2% were from the counties of Essex, Lambton and Chatham-Kent, 19.8% were from the remainder of southwestern Ontario and 17.4% were from the GTA.

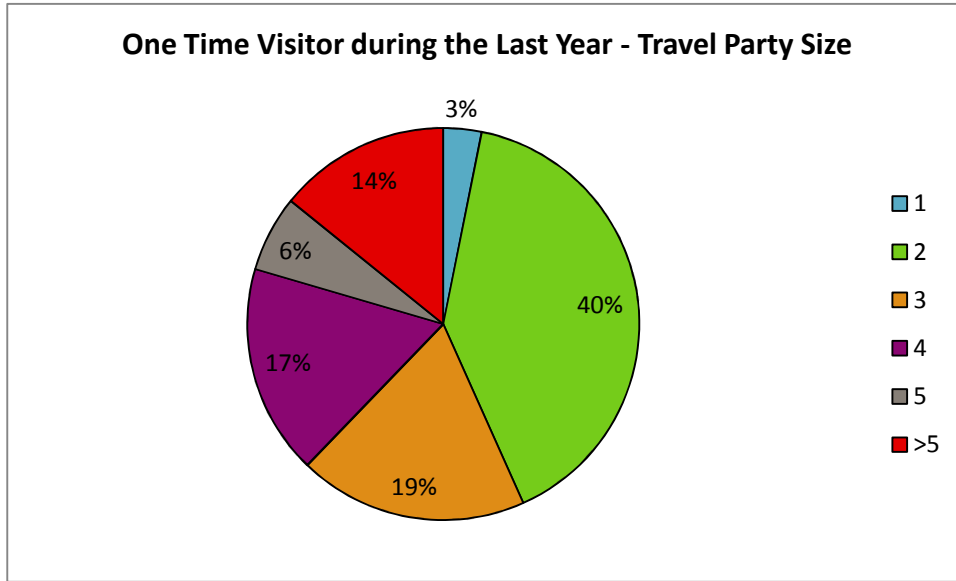
Exhibit 3-35 Average One Time Visitors in the Last Year Usual Place of Residence



Travel Party Size

As shown in **Exhibit 3-36**, 40% of One Time Visitors to Pelee Island came in travel party sizes of two (2), 19% came in travel party sizes of three (3), and 17% came in travel party sizes of four (4).

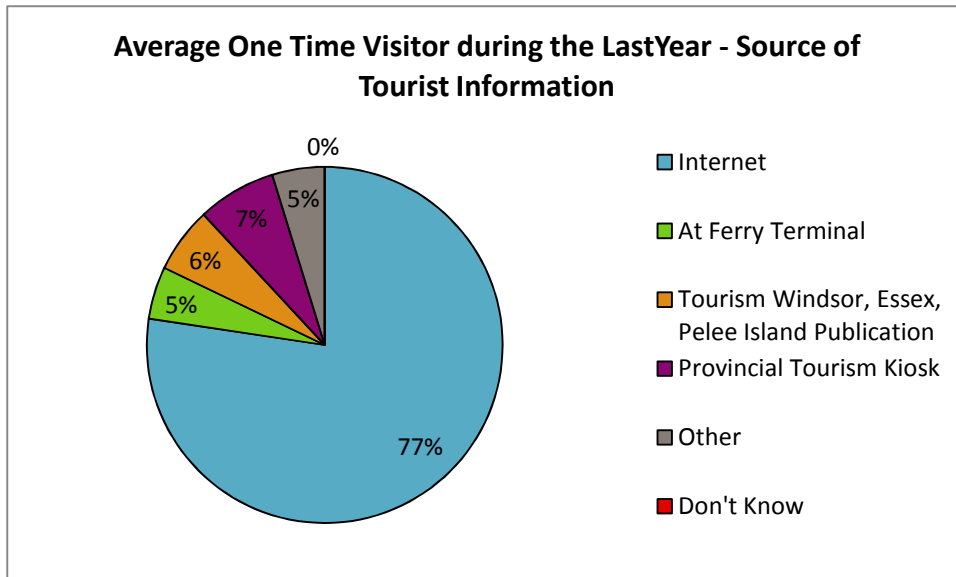
Exhibit 3-36 One Time Visitor during the Last Year Travel Party Size



Source of Tourist Information

77% of One Time Visitors found their tourist information on the internet, while the remaining 23% found information from the ferry terminal, Tourism Windsor, Essex, Pelee Island Publication, Provincial Tourism Kiosk and other sources (Exhibit 3-37).

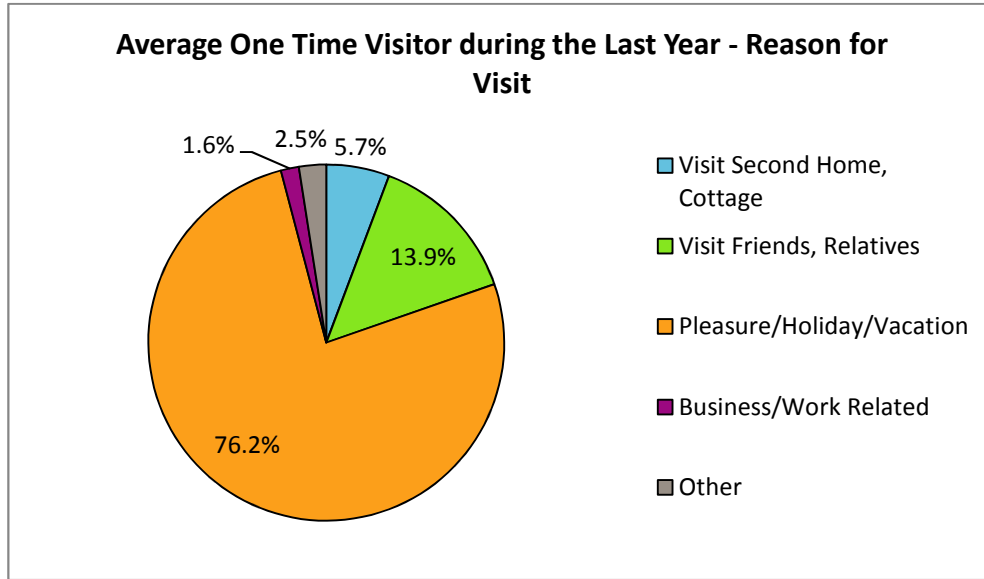
Exhibit 3-37 Source of Tourist Information for the One Time Visitor in the Last Year



Reason for Visit

Exhibit 3-38 shows that the Average One Time Visitor during the Last Year came to Pelee Island for pleasure/holiday/vacation (76.2%).

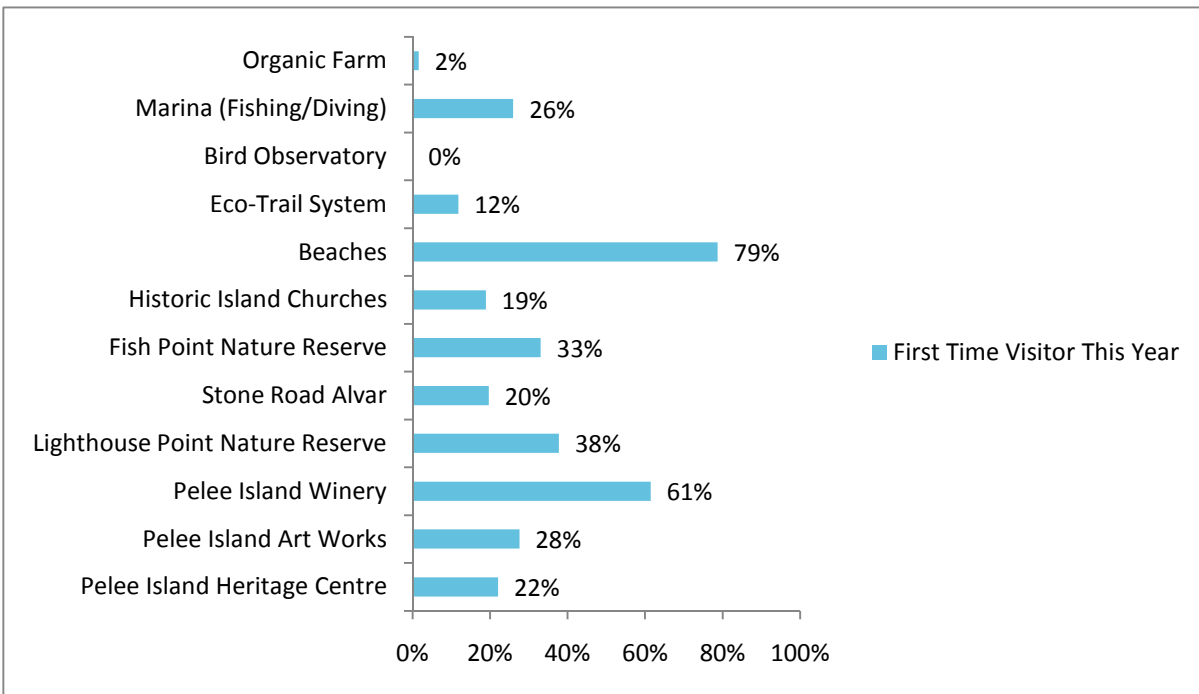
Exhibit 3-38 Average One Time Visitor during the Last Year – Reason for Visit



Attractions Visited

As shown in **Exhibit 3-39**, 79% of One Time Visitor went to the beaches, 61% went to the Pelee Island Winery and 38% visited the Lighthouse Point Nature Reserve.

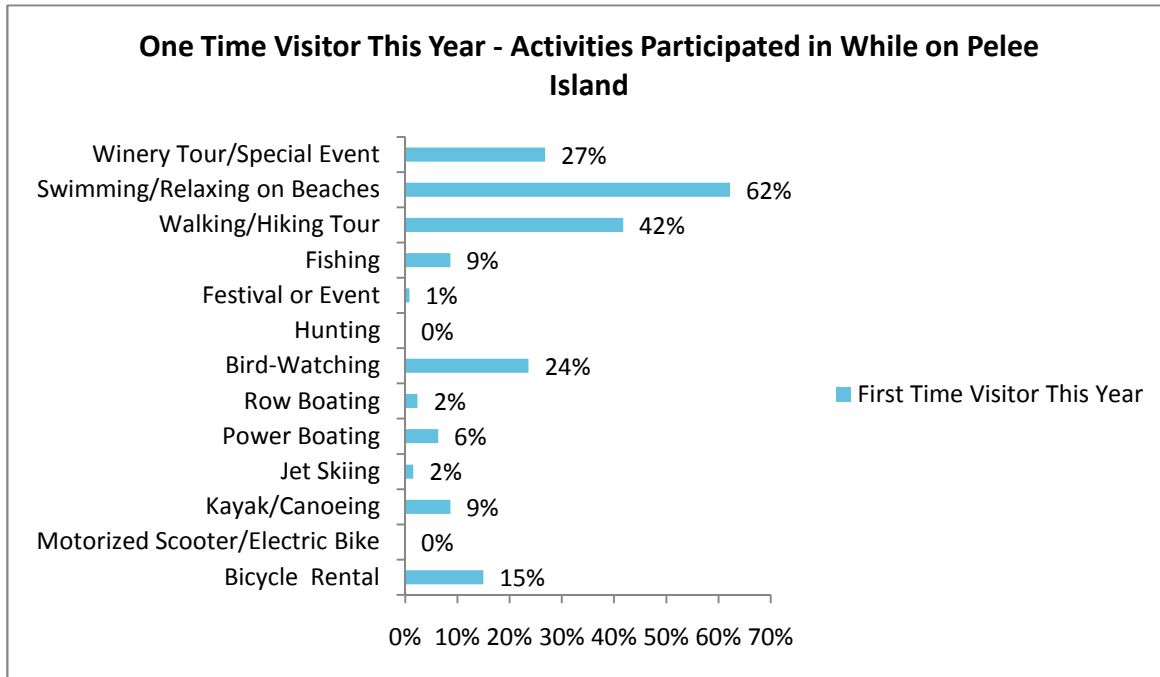
Exhibit 3-39 Attractions Visited by First Time Visitor This Year While on Pelee Island



Activities Participated In

As shown in **Exhibit 3-40**, 62% of One Time Visitor swam and relaxed on the beaches, 42% went on a walking/hiking tour and 27% participated in a Winery tour/special event.

Exhibit 3-40 Activities Participated in by One Time Visitors this Past Year While on Pelee Island



Trip Spending

Overall, the Average One Time Visitor during the Last Year spent an average of \$383.34 per group or \$43.30 per person per day.

Expense Type	Average Spending per Group (3.57 people / 2.48 days)	Average Spending Per Person Per Day
Accommodation	\$ 181.37	\$ 20.48
Food & Beverage at Restaurants/Bars	\$ 96.33	\$ 10.88
Food & Beverage at Stores	\$ 23.82	\$ 2.69
Vehicle Rental/Insurance	\$ 4.25	\$ 0.48
Vehicle Operation (i.e. fuel)	\$ 4.29	\$ 0.48
Local Transportation on Pelee Island	\$ 0.09	\$ 0.01
Ferry Fees	\$ 66.07	\$ 7.46
Sports, Recreation and associated Rentals	\$ 6.03	\$ 0.68
Cultural & Entertainment Activities/Attractions	\$ 3.69	\$ 0.42
Other (souvenirs, shopping, photos, etc)	\$ 20.67	\$ 2.33
TOTAL	\$ 383.34	\$ 43.30

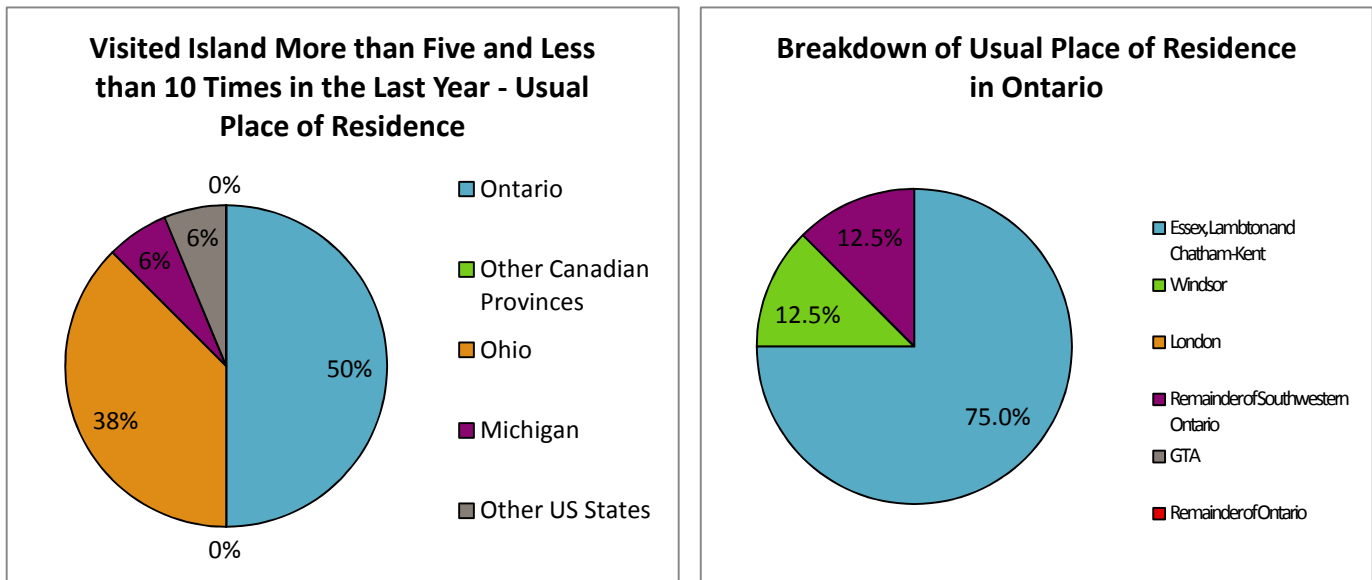
3.2.6 Average Five to Ten Time Visitor during the Last Year

The Average Five to Ten Time Visitor during the Last Year represented 16 of the 221 surveyed. The average group size was 2.88 people and the average length of stay was 4.35 days.

Place of Residence

The usual place of residence for visitors who have been to Pelee Island Five to Ten Times during the last year were made up of 50% from Ontario and 38% from Ohio (**Exhibit 3-41**). Of the visitors from Ontario, 75% are from the counties of Essex, Lambton and Chatham-Kent, Windsor and the remainder of southwestern Ontario each represented 12.5%.

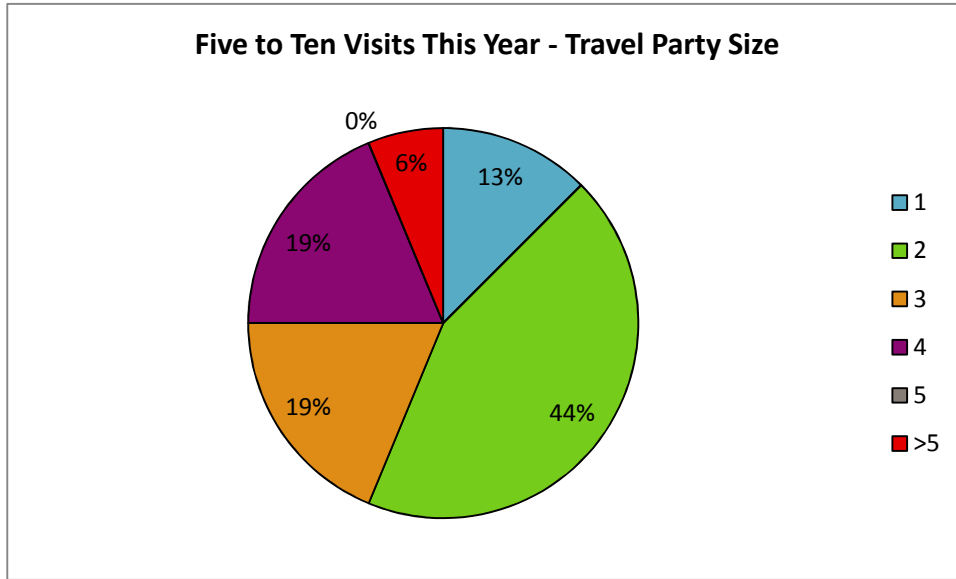
Exhibit 3-41 Five to Ten Visitor during the Last Year – Usual Place of Residence



Travel Party Size

As shown in **Exhibit 3-42**, 44% of Five to Ten Time Visitors came to the island in travel party sizes of two (2). 19% respectively came in travel party sizes of three (3) and four (4).

Exhibit 3-42 Five to Ten Visitor during the Last Year Travel Party Size



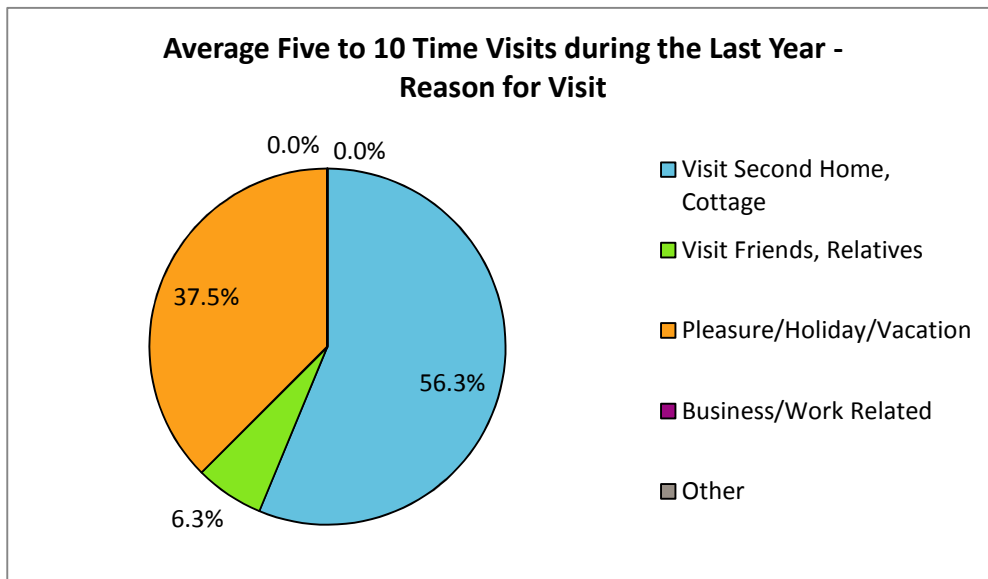
Source of Tourist Information

The visitors who came to the island an average of Five to Ten Times during the last year did not obtain tourist information.

Reason for Visit

For visitors who came to Pelee Island an average of Five to Ten Times during the last year, 56.3% came to visit a second home, cottage and 37.5% came for pleasure/holiday/vacation (**Exhibit 3-43**).

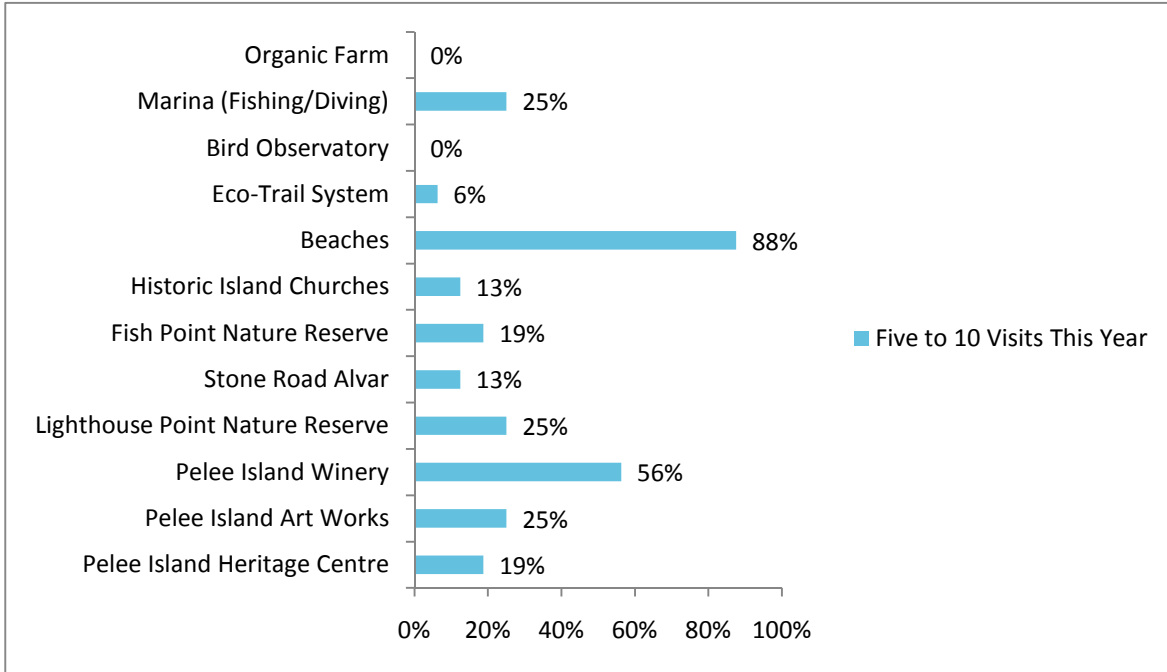
Exhibit 3-43 Average Five to Ten Time Visitor during the Last Year Reason for Visit



Attractions Visited

Exhibit 4-44 shows that, for visitors who came to Pelee Island Five to Ten Times during the last year, 88 % went to the beaches and 56% visited the Pelee Island Winery.

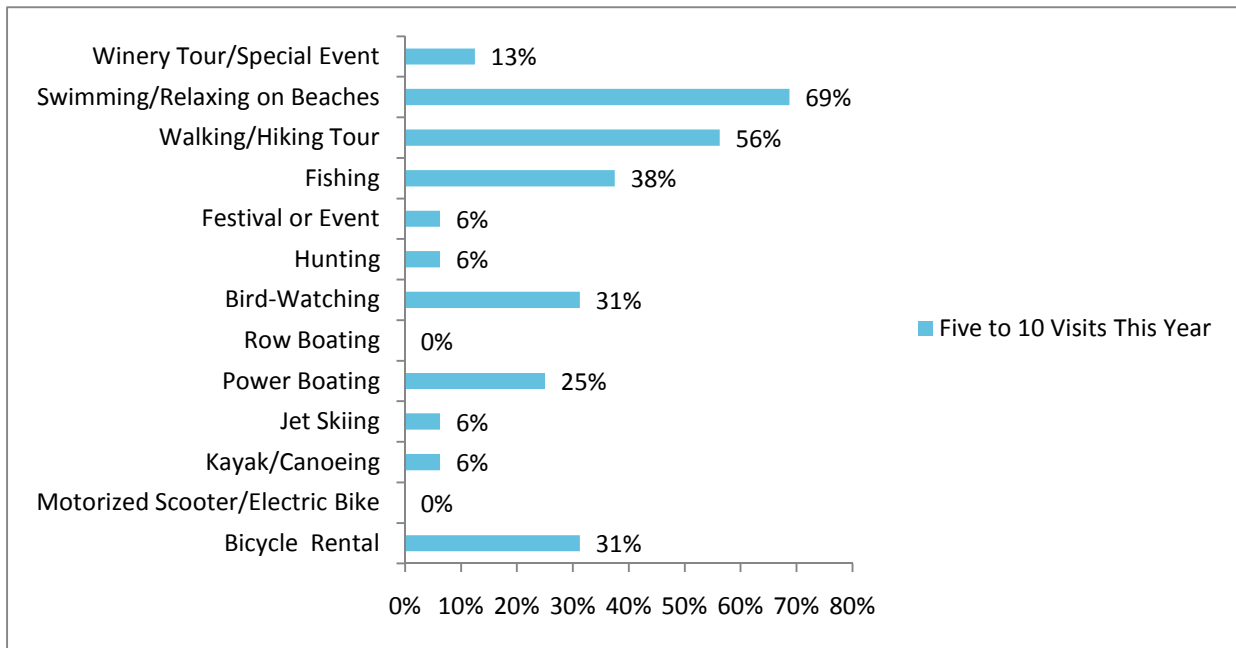
Exhibit 3-44 Attractions Visited for Groups who Came to Pelee Island Five to Ten Visits during the Last Year



Activities Participated In

Exhibit 3-45 shows that for visitors who came to Pelee Island Five to Ten Times during the last year, 69% swam/relaxed on the beaches, 56% went on a walking/hiking tour and 38% went fishing.

Exhibit 3-45 Activities Participated in for Groups who Came for Five to Ten Visits during the Last Year



Trip Spending

Overall, Visitors who came to Pelee Island Five to Ten Times during the last year, spent \$0 on accommodation and in total \$229.56 per group or \$21.60 per person/day.

Expense Type	Average Spending per Group (2.88 people / 3.69 days)	Average Spending Per Person
Accommodation	\$ 0	\$ 0
Food & Beverage at Restaurants/Bars	\$ 53.44	\$ 1.47
Food & Beverage at Stores	\$ 43.69	\$ 4.11
Vehicle Rental/Insurance	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 13.75	\$ 1.29
Local Transportation on Pelee Island	\$ 0	\$ 0
Ferry Fees	\$ 73.38	\$ 6.90
Sports, Recreation and associated Rentals	\$ 0	\$ 0
Cultural & Entertainment Activities/Attractions	\$ 5.63	\$ 0.53
Other (souvenirs, shopping, photos, etc)	\$ 39.06	\$ 3.67
TOTAL	\$ 229.56	\$ 21.60

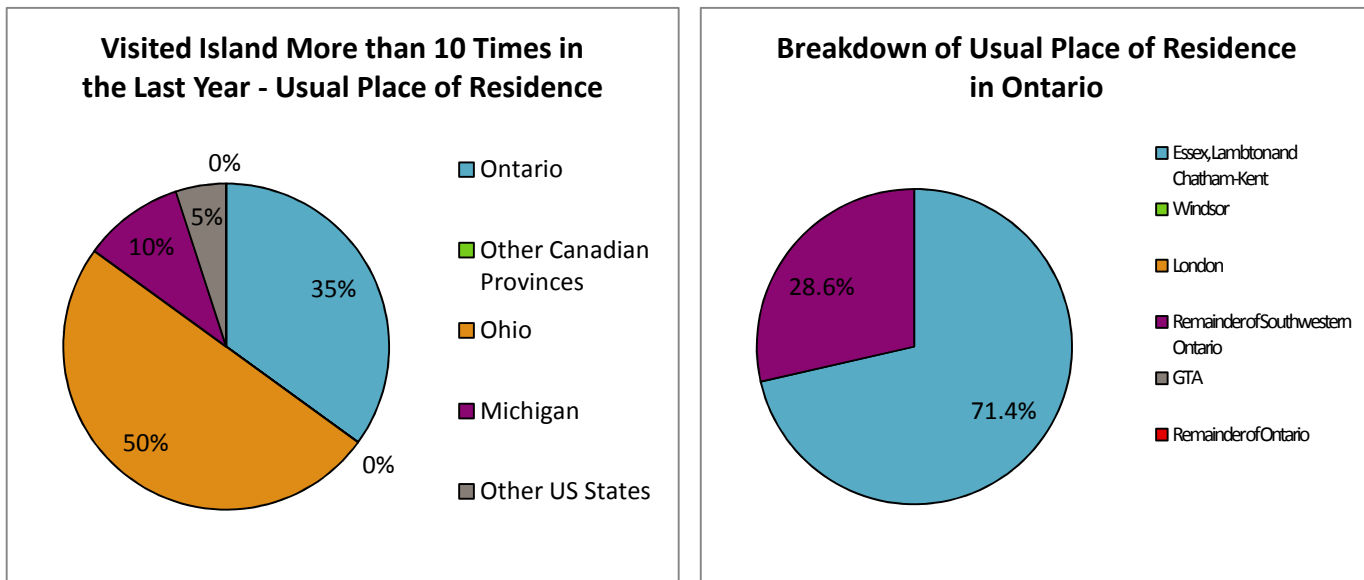
3.2.7 More than Ten Time Visitor during the Last Year

The Average More than Ten Time Visitor during the Last Year represents 16 of the 221 surveys. The average group size was 2.8 people and the average length of stay was 4.35 days.

Place of Residence

Exhibit 3-46 shows that for visitors who came to Pelee Island More than Ten Times, 50% were from Ohio and 35% were from Ontario. Of the visitors from Ontario, 71.4% were from the counties of Essex, Lambton and Chatham-Kent and the remaining 28.6% were from the remainder of southwestern Ontario.

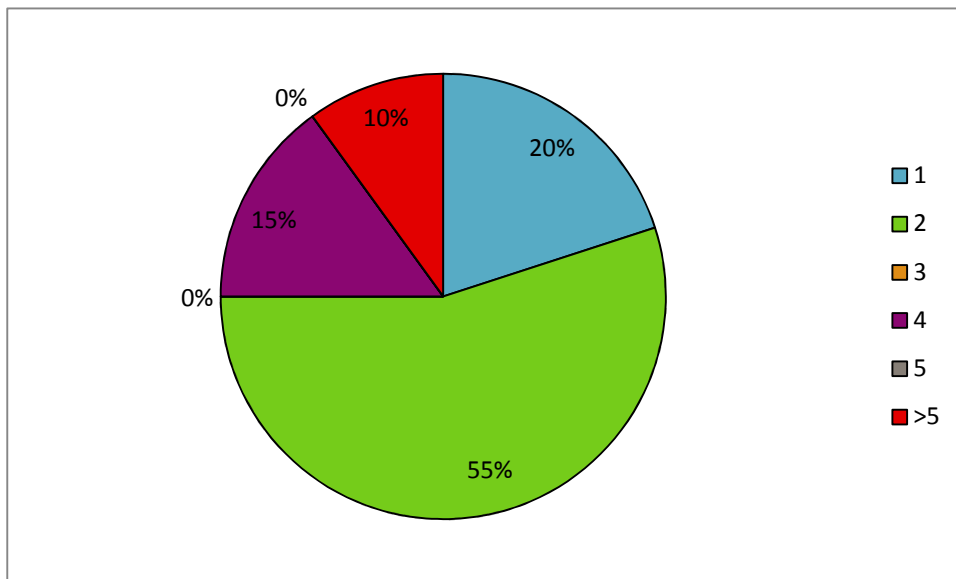
Exhibit 3-46 More than Ten Visits during the Last Year Usual Place of Residence



Travel Party Size

As shown in **Exhibit 3-47**, 55% of visitors who came to Pelee Island Ten or More times came in a travel party size of two (2). 20% came in a travel party size of one (1) and 15% came in a party size of four (4).

Exhibit 3-47 More than Ten Visits during the Last Year Travel Party Size



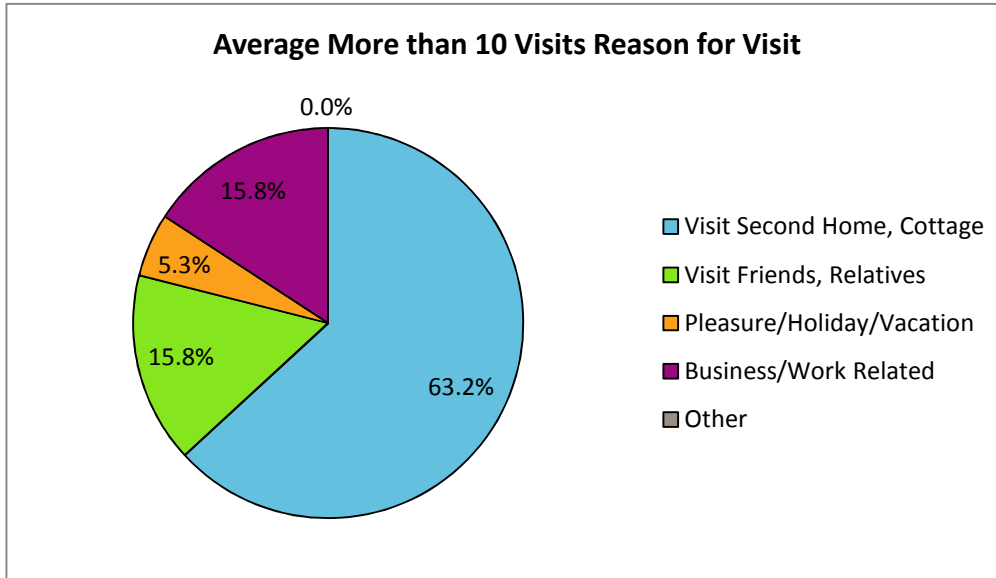
Source of Tourist Information

The visitors who came to the island an Average Ten or More Times during the Last Year did not obtain tourist information.

Reason for Visit

Of the visitors who came to Pelee Island More than Ten Times, 63.2% came to visit a second home, cottage and 15.8% came for business/work related reasons and 15.8% came to visit friends, relatives (**Exhibit 3-48**).

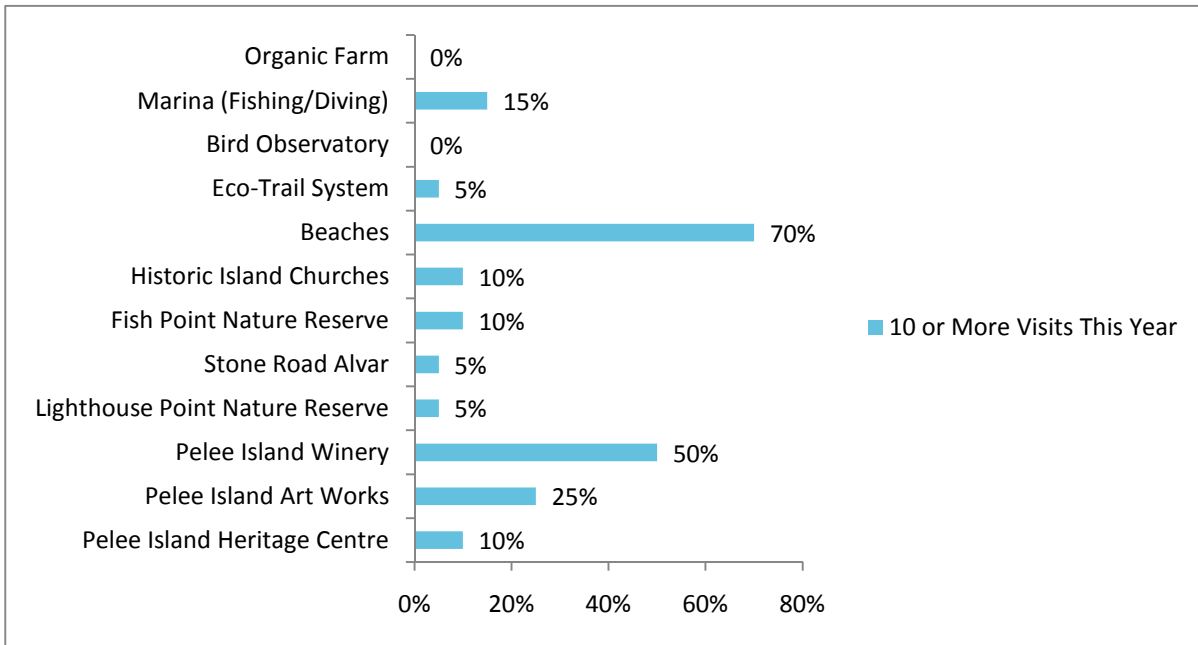
Exhibit 3-48 Average More than 10 Visits – Reason for Visiting Pelee Island



Attractions Visited

As shown in **Exhibit 3-49**, of the visitors who came to Pelee Island More than Ten Times, 70% went to the beaches, 50% went to the Pelee Island Winery and 25% visited the Pelee Island Art Works.

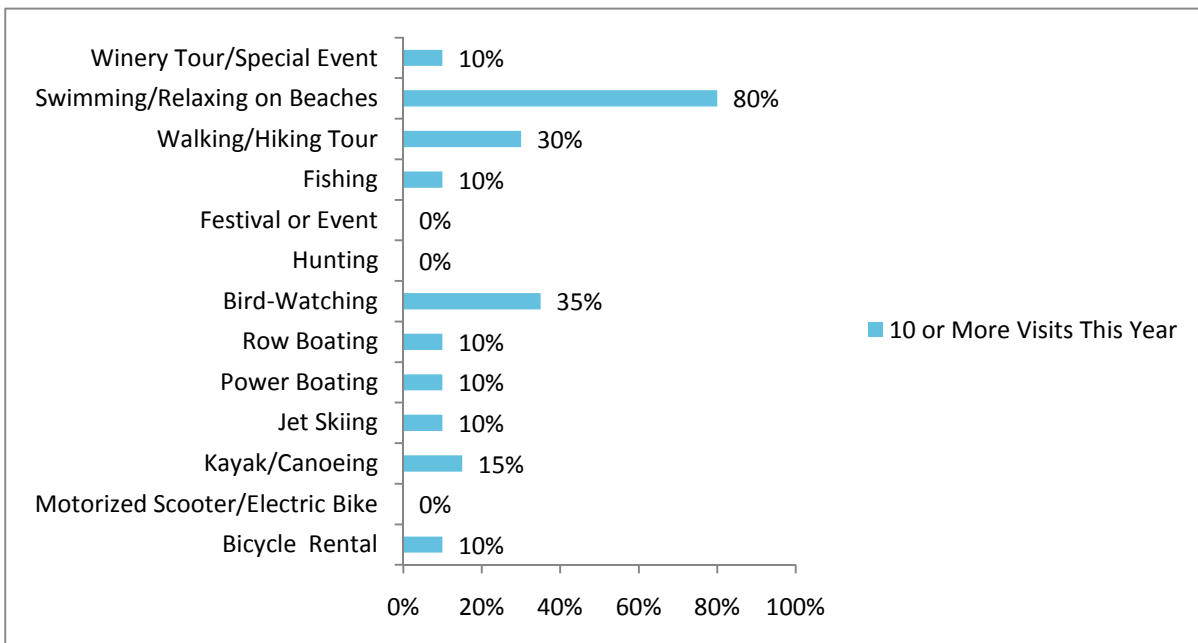
Exhibit 3-49 Attractions Visited by Groups who Came More than Ten Times during the Last Year



Activities Participated In

As shown in **Exhibit 3-49**, 80% of visitors who have come to Pelee Island More than Ten Times swam or relaxed on the beaches. 35% went bird-watching and 30% went on a walking/hiking tour.

Exhibit 3-50 Activities Participated in by Groups who Came More than Ten Times during the Last Year



Trip Spending

Overall, visitors who came to Pelee Island More than Ten Times during the Last Year spent \$0 on accommodation and on average \$157.02 per group or \$12.89 per person per day.

Expense Type	Average Spending per Group (2.8 people / 4.35 days)	Average Spending Per Person Per Day
Accommodation	\$ 0	\$ 0
Food & Beverage at Restaurants/Bars	\$ 43.60	\$ 3.58
Food & Beverage at Stores	\$ 29.25	\$ 2.40
Vehicle Rental/Insurance	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 12.00	\$ 0.99
Local Transportation on Pelee Island	\$ 0	\$ 0
Ferry Fees	\$ 52.92	\$ 4.34
Sports, Recreation and associated Rentals	\$ 0	\$ 0
Cultural & Entertainment Activities/Attractions	\$ 0	\$ 0
Other (souvenirs, shopping, photos, etc)	\$ 20.25	\$ 1.66
TOTAL	\$ 157.02	\$ 12.89

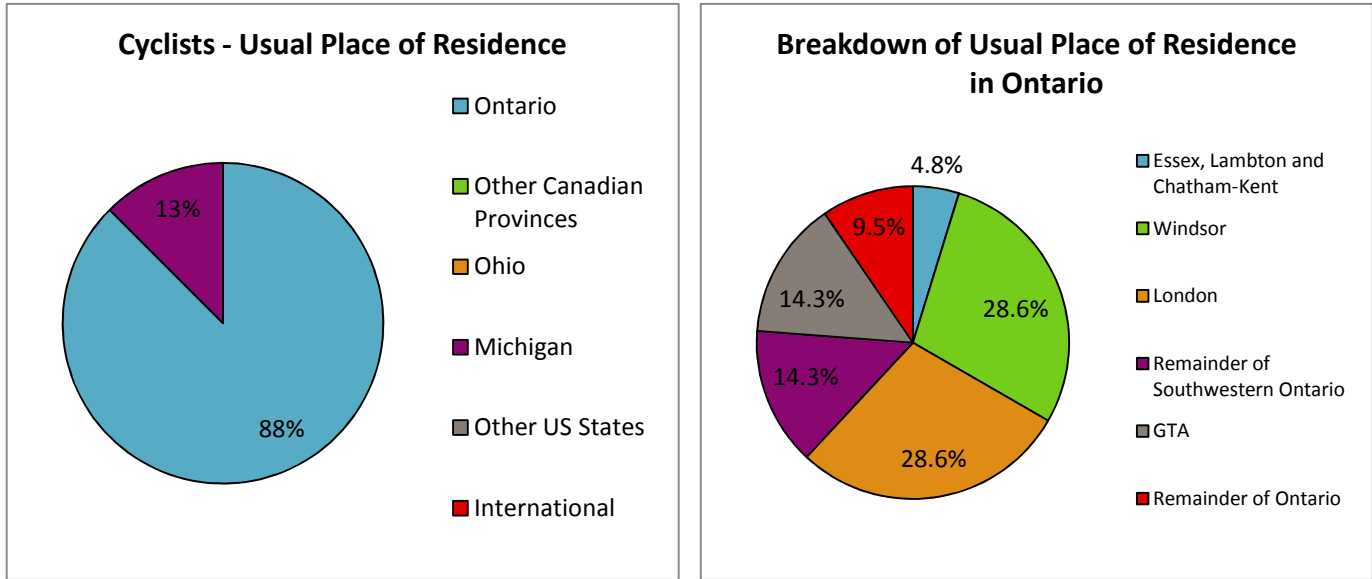
3.2.8 Average Cyclist

The Average Cyclist represented 24 of the 221 surveys. The average group size was 2.25 people and the average length of stay was 1.5 days.

Place of Residence

As shown in **Exhibit 3-51**, 88% of Cyclists were from Ontario and the remaining 13% were from Michigan. Of the Cyclists from Ontario, 28.6% were respectively from Windsor and London, and the remainder of southwestern Ontario and the GTA each represented 14.3%.

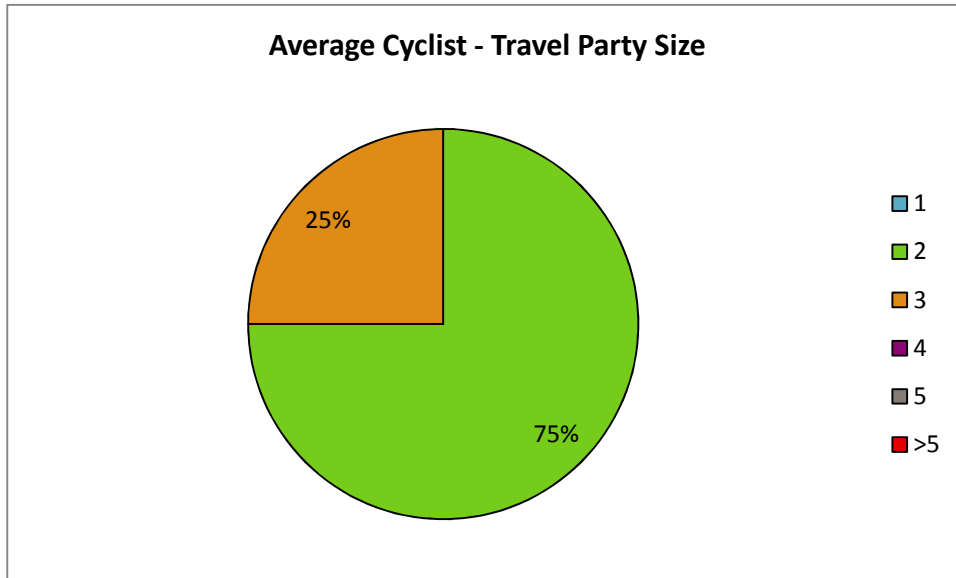
Exhibit 3-51 Average Cyclist – Usual Place of Residence



Travel Party Size

75% of Cyclists travelled in parties of two (2) and 25% of Cyclists came in parties of three (3) (**Exhibit 3-52**).

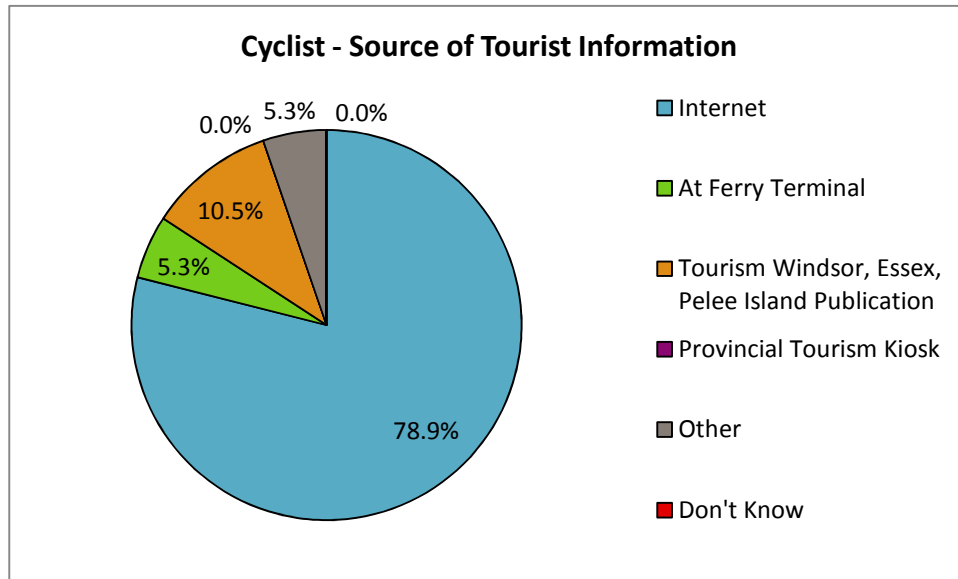
Exhibit 3-52 Average Cyclist Travel Party Size



Source of Tourist Information

As shown in **Exhibit 3-53**, 78.9% of Average Cyclists found their tourist information on the internet and 10.5% found their information from a Tourism Windsor, Essex, Pelee Island Publication.

Exhibit 3-53 Source of Tourist Information for Cyclists



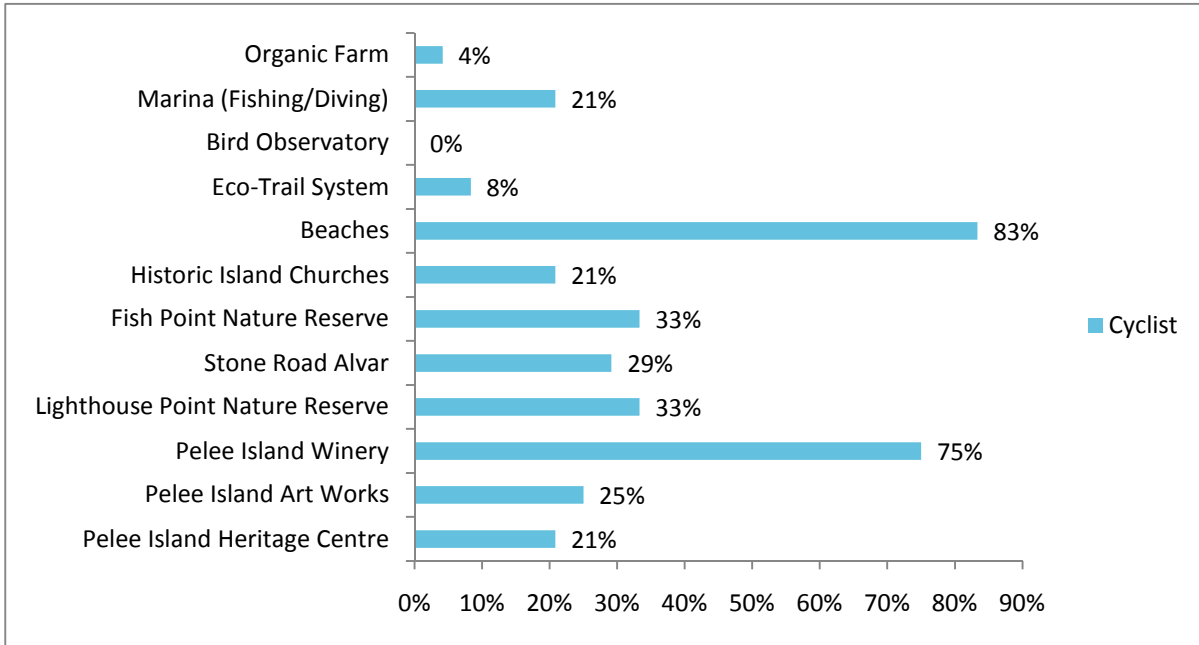
Reason for Visit

100% of the Average Cyclists visiting Pelee Island came for pleasure/holiday/vacation.

Attractions Visited

As shown in **Exhibit 3-54**, 83% of Cyclists visited the beaches and 75% went to the Pelee Island Winery, 33% respectively went to Fish Point Nature Reserve and Lighthouse Point Nature Reserve.

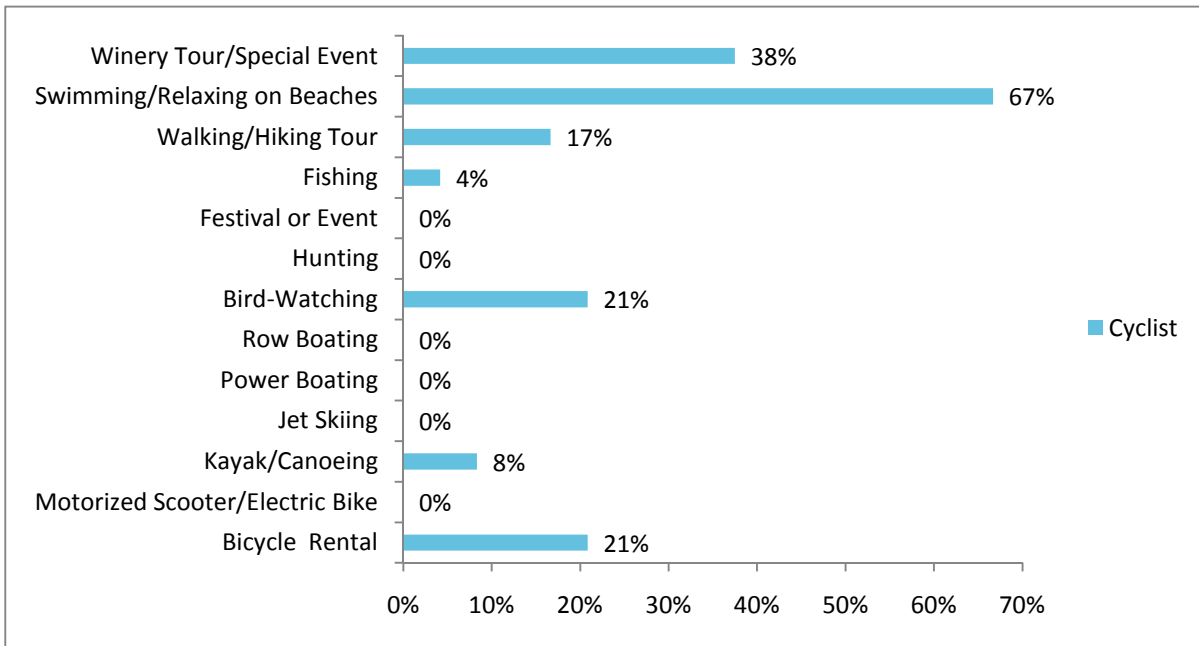
Exhibit 3-54 Attractions Visited by the Average Cyclist While on Pelee Island



Activities Participated In

In **Exhibit 3-55**, 67% of Cyclists swam and relaxed on the beaches and 38% participated in a Winery Tour/Special Event.

Exhibit 3-55 Activities Participated in by the Average Cyclist While on Pelee Island



Trip Spending

Overall, the total trip spending per average Cyclist group was \$281.79 or \$83.49 per person per day.

Expense Type	Average Spending per Group (2.25 people / 1.5 days)	Average Spending Per Person Per Day
Accommodation	\$ 112.46	\$ 33.32
Food & Beverage at Restaurants/Bars	\$ 60.92	\$ 18.05
Food & Beverage at Stores	\$ 14.04	\$ 4.16
Vehicle Rental/Insurance	\$ 0	\$ 0
Vehicle Operation (i.e. fuel)	\$ 0	\$ 0
Local Transportation on Pelee Island	\$ 0	\$ 0
Ferry Fees	\$ 45.71	\$ 13.54
Sports, Recreation and associated Rentals	\$ 4.38	\$ 1.30
Cultural & Entertainment Activities/Attractions	\$ 7.92	\$ 2.35
Other (souvenirs, shopping, photos, etc)	\$ 28.96	\$ 8.58
TOTAL	\$ 281.79	\$ 83.49

4. Summary of Survey Findings

The following provides a summary of the responses that tourists provided during the survey period.

4.1 Summary of Findings Based Upon Category of Response

Place of Residence and Party Size

While 68% of the respondents were Canadian, 29% were American and 3% were International. Within Ontario, 36% of respondents were from Essex, Lambton and Chatham Kent, 14% were from Windsor, 16% were from the remainder of Southwestern Ontario, 15% were from the GTA, and 12% were from London. Therefore, the majority of Ontario visitors to Pelee Island are from Southwestern Ontario and the GTA.

Of those who travelled to Pelee Island, 40.7% of tourist travel party sizes were couples, 16% were in groups of 3-4 and 13.6% of tourist travel parties were greater than five (5) in size. Therefore, tourists are coming mainly as couples or families.

Tourist Trip Frequency

Of the individuals surveyed, the majority of tourists were travelling to Pelee for the first time. As noted in the stakeholder observations and operator visitation in the Tourism Existing Conditions Report for the Pelee Island Transportation Study, there are a lot of first-time visitors drawn to Pelee Island, but repeat visitation is lacking. This is an interesting finding, as 93% of visitors during the Tourism Experience survey period said that they would return.

Of the individuals surveyed who were single-day trip users, 46% were not able to see everything on the Island that they came to see.

Planning Visit to Pelee Island/Tourist Information

Of the 54% of respondents who sought out tourist information, 77% of them found their information on the internet. Comments received from those surveyed included that Pelee Island needs to improve their marketing in the areas of communication, better internet capabilities/websites and level of detail/clarity of the maps. Tourists also indicated that additional tourist information about Pelee Island is also needed on the ferry.

A number of comments were received with respect to the lack of a central repository of tourist information upon arrival to the Island. Many respondents felt that the Island could use a tourist information centre or board at the entrance/exit to the ferry.

Change of Trip Plans Based Upon Availability of Ferry Passage

Of all the individuals surveyed 19% had problems or had to change their trip plans because of the ferry passage availability. When looking at the Canadian and American trip plan results separately, 15.3% of Canadians had to change their trip plans because of the ferry availability whereas changes in trip plans almost doubled for Americans to 27.7% (Appendix A). It was noted in the comments received that inadequate ferry vehicle capacity was the main reason for the change of trip plans.

Travel while on the Island

While on the Island, 60% of individuals used their passenger vehicle to get around the Island, 14% walked from the ferry terminal and 13% used their bicycle. Comments received relating to the travel on the Island included that first time visitors should be made aware that walking between Island attractions is not an option for most tourists because of the distance between them. Note that 38% of individuals who came by vehicle would not come to Island if they could not bring their car.

Accommodation and Food while on Pelee Island

Accommodation Experience on Pelee Island

Of those who stayed overnight, 44.2% of individuals stayed with a Friend/Family (cottage/house), 30.4% stayed at Rental Cottage/House and 15.9% stayed at a Bed and Breakfast. There is not a great difference between the percentages those who paid for accommodations and those who stayed with family, friends or their cottage.

Following the survey it was noted that the survey question regarding accommodation did not provide a clear answer for individuals who were visiting their seasonal residence/cottage.

Dining/Eating Experience on Pelee Island

33% of the respondents purchased food from a store while on the Island. There are only two (2) retail locations where food and beverage can be purchased and it was noted in the survey that the Island needs more convenience shopping (e.g. bottled water). Neither the brochure nor the website provides adequate information about amenities available on the Island for tourists.

It is noteworthy that 75% of respondents ate at a restaurant, pub, inn or bakery and the majority of these respondents gave the establishments high ratings.

Attractions Visited while on Pelee Island

Of the individuals surveyed, 74% visited the beaches and 59% visited the Pelee Island Winery. There were also a number of comments received about how the beaches are not maintained to a standard acceptable to tourists.

Additional comments on the attractions were that the passive natural attractions do not have adequate directional signage and explanatory signage within the attraction area. In addition, respondents indicated that there is not enough signage along roads for the islands attractions.

Attractions that had fewer than 20% visitation included the Eco-trail system, Historic Island Churches, Stone Road Alvar, and Pelee Island Heritage Centre.

Public Facilities

A comment that was received by a number of individuals surveyed was that there are no public facilities at the public beaches. The 'Experience Pelee' brochure map of the Island shows five (5) public washrooms available on the Island, but many tourists are not aware of these locations and only one (1) public washroom is located near a public beach. Additional comments that relate to the beaches included the need for more parking and picnic facilities like those found at provincial parks.

Activities Participated in while on Pelee Island

There were a number of activities that were available during the month of July but their utilization by tourists was under 20%. These included motorized scooter/electric bike 0%, jet skiing 2%, row boating 3%, power boating 10%, canoeing/kayaking 10%, fishing 12%, and bicycle rental 15%. Although there is promotion on the Municipal website, specific details on the tourist activities is not available in the Pelee Island Experience Brochure.

Trip Spending

Total average spending per tourist travel party (3.45 people) was \$328, while the average trip spending for single-day trip per capita was \$35.08. When subtracting the average ferry fee of \$7.27 for a return trip, tourists are spending an average of \$27.81 (per capita) on Pelee Island on a single day visit (Appendix A). When looking at the *Premier Ranked Tourist Destination Evaluation* numbers for Windsor, Essex County and Pelee Island in 2001 the average expenditure per capita for day trips was \$92.61 and the provincial average was \$72.20 (2003). Therefore, Pelee Island is below the regional and provincial tourist trip per capita expenditure averages.

Overall Pelee Island Experience

Overall, 93% of respondents said that they would return to Pelee Island. This shows that the majority of visitors coming to Pelee Island had a positive experience.

For the 7% of respondents who said that they would not return, reasons included:

- Island could use a tourist information centre at the entrance, and signage;
- Limited attractions and activities; and
- Limited ferry departure times.

A few of the individuals responded that they came specifically as a one time visitor and will now be visiting other tourist areas.

4.2 Summary of Findings Based Upon Category of Tourist Travel Party

The following **Exhibit 4-1** provides a summary of the key findings from Section 3.2 based upon the Category of Tourist Travel Party.

Exhibit 4-1 Summary of Category of Tourist Travel Party Findings

Category	Average Single Day Tripper	Average One Night Visitor on the Island	Average Two Night Visitor to the Island	Average Cottage Renter	Average Cottager / Second Home	Average One-Time Visitor during the Last Year	Average Five to 10 Time Visitor during the Last Year	Average More than 10 Time Visitor during the Last Year	Average Cyclist
Place of Residence	76% Ontario 9% Michigan	97% Ontario 3% Other US States	58% Ontario 28% Ohio	79% Ontario 10% Ohio 7% Other US States	47% Ontario 44% Ohio	68% Ontario 12% Ohio 9% Other US States	50% Ontario 38% Ohio	50% Ohio 35% Ontario 10% Michigan	88% Ontario 13% Michigan
Place of Residence - Ontario	31% Essex, Lambton and Chatham-Kent 17.2% GTA 15.5% Windsor 15.5% remainder of Southwestern Ontario	43.3% Essex, Lambton and Chatham-Kent 20% remainder of Southwestern Ontario 20% Windsor	34.8% Essex, Lambton and Chatham-Kent 21.7% remainder of Southwestern Ontario 17.4% London	53.1% Essex, Lambton and Chatham-Kent 12.5% GTA 12.5% London 12.5% Windsor	66.7% Essex, Lambton and Chatham-Kent 13.3% London 13.3% remainder of Southwestern Ontario	30.2% Essex, Lambton and Chatham-Kent 19.8% remainder of Southwestern Ontario 17.4% GTA	75% Essex, Lambton and Chatham-Kent 12.5% Windsor 12.5% remainder of Southwestern Ontario	71.4% Essex, Lambton and Chatham-Kent 28.6% remainder of Southwestern Ontario	28.6% Windsor 28.6% London 14.3% GTA 14.3% remainder of Southwestern Ontario 9.5% remainder of Ontario
Travel Party Size	44.9% Two 15.4% Four 15.4% More than Five 14.1% Three	52% Two 16% One 13% Four	50% Two 18% Four 15% Three	24% More than five 24% Four 21% Two 17% Three	40.6% Two 28.1% Four 12.5% Three	40% Two 19% Three 17% Four	44% Two 19% Four 19% Three	55% Two 20% One 15% Four	75% Two 25% Three
Source of Tourist Information	66.1% Internet 11.9% Ferry Terminal 10.2% Tourism Windsor, Essex, Pelee Island Publication	82% Internet 12% Other	94% Internet 6% Tourism Windsor, Essex, Pelee Island Publication	95% Internet 5% Tourism Windsor, Essex, Pelee Island Publication	6.25% Internet 93.75% Did not obtain tourist information	77% Internet 7% Provincial Tourism Kiosk 6% Tourism Windsor, Essex, Pelee Island Publication	Did not obtain tourist information	Did not obtain tourist information	78.9% Internet 10.5% Tourism Windsor, Essex, Pelee Island Publication
Reason for Visit	81.9% Pleasure/ Holiday/ Vacation 9.7% Visit Friends, Relatives	69% Pleasure/ Holiday/ Vacation 13.8% Business/ Work Related 10.3% Second Home, Cottage	53.7% Pleasure/ Holiday/ Vacation 22% Second Home, Cottage 22% Friends, Relatives	77.5% Pleasure/ Holiday/ Vacation 7.5% Second Home, Cottage	100% Second Home, Cottage	76.2% Pleasure/ Holiday/ Vacation 13.9% Friends, Relatives	56.3% Second Home, Cottage 37.5% Pleasure/ Holiday/ Vacation	63.2% Second Home, Cottage 15.8% Business/ Work Related 15.8% Friends, Relatives	100% Pleasure/ Holiday/ Vacation
Attraction Visited While on Pelee Island	60.3% Beaches 55.1% Winery 30.8% Lighthouse Pt NR 23.1% Fish Point NR	58% Beaches 45% Winery 29% Lighthouse Pt NR 16% Historic Island Churches	93% Beaches 63% Winery 25% Lighthouse Pt NR 23% Fish Point NR 23% P.I. Art Works	86% Beaches 64% Winery 48% P.I. Art Works 43% Marina	78.1% Beaches 59.4% Winery 43.8% P.I. Art Works 34.4% Marina 34.4% Fish Point NR	79% Beaches 61% Winery 38% Lighthouse Pt NR 33% Fish Point NR	88% Beaches 56% Winery 25% Marina 25% Lighthouse Pt NR 25% P.I. Art Works	70% Beaches 50% Winery 25% P.I. Art Works 15% Marina	83% Beaches 75% Winery 33% Lighthouse Pt NR 33% Fish Point NR 29% Stone Rd Alvar
Activities Participated in While on Pelee Island	32.1% Swimming/ Relaxing on Beaches 29.5% Winery Tour/ Special Event 24.4% Walking/Hiking 14.1% Bird Watching	45% Swimming/ Relaxing on Beaches 26% Walking/ Hiking 23% Winery Tour/ Special Event 13% Bird Watching	39% Swimming/ Relaxing on Beaches 23% Walking/ Hiking T 14% Winery Tour/ Special Event 9% Bird Watching	81% Swimming/ Relaxing on Beaches 36% Walking/ Hiking 24% Winery Tour/ Special Event 21% Fishing 21% Bird Watching 21% Kayak/ Canoeing	84.4% Swimming/ Relaxing on Beaches 53.1% Walking/Hiking 43.8% Bird-watching 25% Fishing 25% Power Boating	62% Swimming/ Relaxing on Beaches 42% Walking/Hiking 27% Winery Tour/ Special Event 24% Bird-Watching	69% Swimming/ Relaxing on Beaches 56% Walking/Hiking 38% Fishing 31% Bird-Watching 31% Bicycle Rental	80% Swimming/ Relaxing on Beaches 35% Bird Watching 30% Walking/ Hiking 15% Kayak/Canoeing	67% Swimming/ Relaxing on Beaches 38% Winery Tour/ Special Event 21% Bird-Watching 21% Bicycle Rental 17% Walking/Hiking
Trip Spending (person/day)	\$34.22	\$38.87	\$36.36	\$27.72	\$16.80	\$43.30	\$21.60	\$12.89	\$83.49

The following sections summarize key findings from **Exhibit 4-1**.

Average Single-Day Tripper

The usual place of residence for the Average Single Day Tripper was 76% from Ontario and 9% from Michigan. For Ontario, the counties of Essex, Lambton and Chatham-Kent represented 31%; this is the second lowest percentage for Essex, Lambton and Chatham-Kent when compared to other categories of tourist travel parties. A notable difference for the Average Single-Day Tripper was that 17.2% were from the GTA and 15.5% were from Windsor. In addition, all of the International visitors who came to Pelee Island were Single Day Trippers. Parties of two (2) represented almost half (44.9%) of the Single-Day Trippers that came to Pelee Island.

For sources of tourist information, 11.86% obtained their tourist information from the ferry terminal and 10.17% obtained their tourist information from the Tourism Windsor, Essex, Pelee Island publication. These percentages are higher than the overall average found in Section 3.1 of this report.

81.9% of Single-Day Trippers came to Pelee Island for pleasure/holiday/vacation, which is also above the 64.5% overall average found in Section 3.1 of this report.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. Single-Day Trippers had low participation in activities on the Pelee Island with only 32.1% participating in swimming/relaxing on the beaches.

The Average Single-Day Tripper spent \$34.22 per capita while on Pelee Island, this average is similar to the overall average expenditure in Section 3.1.

Average One or Two Night Visitor to the Island

For the Average One Night Visitor 97.7% were from Ontario. Within Ontario, 43.3% from the counties of Essex, Lambton, Chatham-Kent and a notable 20% were from Windsor. 50% of the travel party sizes were groups of two (2) and 16% came alone. Although 69% of One Night Visitors came for pleasure/holiday/vacation, 13.8% came for business/work related reasons. The percentage of travel parties of one correlates with those who answered business/work related as their reason for coming to Pelee Island.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. The Average One Night Visitor went to the Lighthouse Point Nature Reserve (29%) and the Historic Island Churches (16%). Similar to the Single-Day Trippers, the One Night Visitors had low participation in activities on Pelee Island.

The average expenditure per person per day for One Night Visitors was \$38.87, which was third highest for expenditures when comparing the categories of tourist travel parties.

The Two Night Visitors findings were different from the One Night Visitors with respect to the usual place of residence and the reason for visiting Pelee Island. For the usual place of residence of Two Night Visitors, Ohio represented 28% and Ontario represented 58% with 17.4% of these groups from London. The travel party size was represented mainly by groups of two (2) (50%). For Two Night Visitors, approximately 22% came to visit their second home or cottage and 22% visited friends or relatives.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. Of Average Two Night Visitors, 25% went to the Lighthouse Point Nature Reserve, 23% went to the Fish Point Nature Reserve and 23% went to Pelee Island Art

Works. Similar to the One Night Visitors, the Two Night Visitors had low participate rates in activities on Pelee Island.

The average expenditure per capita per day was \$36.36; this expenditure is slightly more than the overall average in Section 3.1.

Average Cottage Renter

For the Average Cottage Renter, 79% were from Ontario and in addition to groups from Essex, Lambton and Chatham-Kent, GTA, London and Windsor each represented 12.5%. Travel party sizes were noticeable larger than the overall average, with party sizes of four (4) and five (5) each representing 24%. 95% of the Average Cottage Renter used the internet as a source of tourist information with 77.5% coming to Pelee Island for pleasure/holiday/vacation.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. 48% of Cottage Renters went to the Pelee Island Art Works and 43% went to the Marina. This is noticeably different from the Single Day Tripper and One and Two night Visitors. 81% of Cottage Renters also went swimming or relaxed on the beaches while on Pelee Island.

The average expenditure per capita for the Average Cottage Renter was \$27.72, which was below the overall average in Section 3.1.

Average Cottager, Second Home

The Average Cottage, Second Home visitor was made up of 44% from Ohio and 47% from Ontario. Of the Cottage, Second Home visitors, 66.7% were from the counties of Essex, Lambton and Chatham-Kent and London and the remainder of southwestern Ontario each represented 13.3%.

Two (2) of the 32 Cottage and Second Home visitors responded that they used the internet as a source of tourist information before coming to Pelee Island. The remaining 30 respondents did not seek out tourist information.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. For the Cottage Renter category, 43.8% went to the Pelee Island Art Works, 34.4% went to the Marina and 34.4% went to Fish Point Nature Reserve. For the activities participate in, 25% went fishing and 25% went power boating.

An interesting finding was that the Average Cottager, Second Home visitor spent the second lowest amount per person/day with an average of \$16.80 per person per day.

Average One-Time Visitor during the Last Year

The Average One-Time Visitor during the Last Year was made up of 68% from Ontario, with a low percentage from the counties of Essex, Lambton and Chatham-Kent (30.2%) and a high percentage of 17.4% from the GTA. In addition, there was a range of visitors from the United States making up 27%. 77% of One-Time Visitors used the internet as a source of tourist information and 76.2% came to Pelee Island for pleasure/holiday/vacation.

The attractions visited and activities participated in are representative of the overall findings in Section 3.1. The average expenditure was second highest with \$43.30 per person per day.

Average Five to Ten Visits during the Last Year

The average visitor from the Five to Ten Time Visitor during the Last Year category was made up of 38% from Ohio and 50% from Ontario. Of those surveyed from Ontario, 75% were from the counties of Essex, Lambton and

Chatham-Kent and 12.5% were from Windsor. As would be expected, visitors who came to Pelee Island between Five to Ten Visits in the Last Year did not seek tourist information.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. Attractions visited by the Average Five to Ten Visits during the Last Year include the Marina, the Lighthouse Point Nature Reserve and the Pelee Island Art Works with 25%. Activities participated in included, 38% fishing and 31% rented bicycles.

The average expenditures for the Average Five to Ten Visits during the Last Year travel party was \$21.60, this is significantly lower than the overall average in Section 3.1.

Average More than Ten Visits during the Last Year

The average visitor from the More than Ten Visits during the Last Year category was made up of 50% from Ohio and 35% from Ontario. This is the only category where there were more visitors from the US. Of the Cottage, Second Home visitors, 71.5% of these from Ontario were from the counties of Essex, Lambton and Chatham-Kent and 28.6% were from the remainder of southwestern Ontario. 55% of this category surveyed came to Pelee Island in groups of two (2) and 20% came alone.

65.2% of visitors came to visit a second home, cottage and business/work and visiting friends and relatives each represented 15.8%. Visiting for pleasure/holiday/vacation had a low percentage (5.3%).

Similar to the Average Five to Ten Visits during the Last Year, visitors who came to Pelee Island More than Ten Visits in the Last Year did not seek tourist information.

In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. 25% of visitors who came More than Ten Visits during the Last Year went to Pelee Island Art Works and 15% went to the Marina. 15% of these visitors also went kayaking/canoeing while on the Pelee Island.

Visitors who came more than ten times during the last year spent the least amount of money per person per day on Pelee Island with an average of \$12.89.

Average Cyclist

The Average Cyclist's usual place of residence was made up of 88% from Ontario and 13% from Michigan. Of those surveyed from Ontario, Windsor and London each made up 28.6%. Travel parties were made up of groups of two (2) (75%) or three (3) (25%) and 100% of Cyclists came to Pelee Island for pleasure/holiday/vacation.

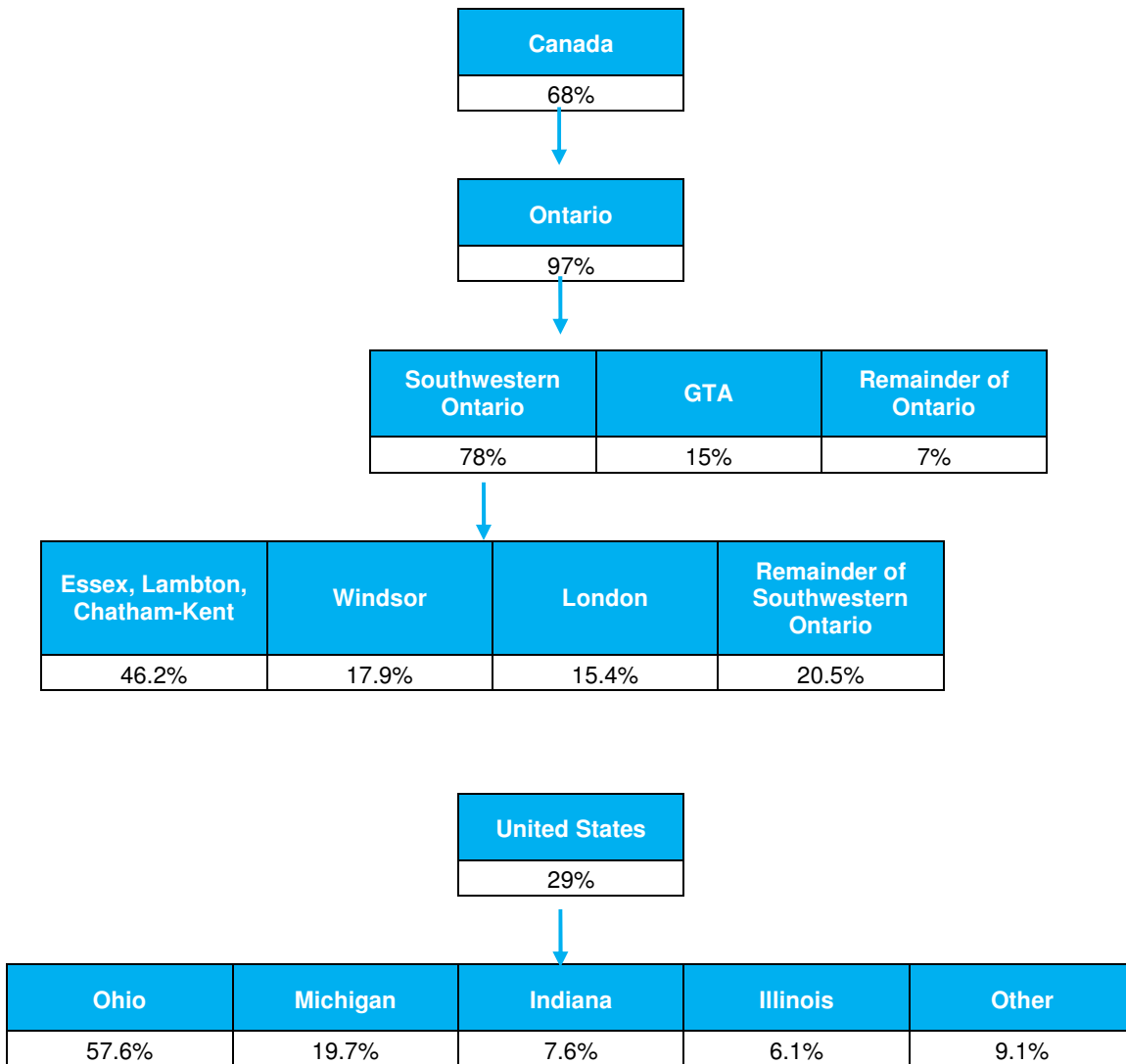
In addition to the common attractions visited and activities participated in, the following summarizes noticeable differences between the categories of tourist travel party. 33% of cyclist each visited the Lighthouse Point Nature Reserve and Fish Point Nature Reserve and 29% went to the Stone Road Alvar. In this category 21% of cyclists rented bicycles to get around Pelee Island.

The Average Cyclist spent the most amount of money per person per day during their stay with an average of \$83.49.

4.3 Conclusions

Place of Residence and Party Size

Overall Place of Residence



These percentages support Industry Canada’s statement that “overall tourism growth in the past few years has been driven by domestic tourism”.

To provide a further breakdown of Ontario and US visitor trends, Ontario had visitor percentages above 50% for Single Day Tripper, One Night Visitor, Two Night Visitor, Cottage Renter, One-Time Visitor during the Last Year, Five to Ten Time Visitor during the Last Year and Cyclist. While Ohio had visitor percentages above 35% for the Average Cottage Owner, Average Five to Ten Time Visitor in the Last Year and Average More than Ten Time Visitor during the Last Year. Therefore the focus of Pelee Island tourism marketing should be based on Ontario, where the majority of non-cottager visitors are coming from.

Breakdown for Ontario

Those surveyed from Essex, Lambton and Chatham-Kent, visit Pelee Island most frequently when compared to the remainder of Ontario and many rent or own a cottage on the island.

Visitors from Windsor come to Pelee Island frequently as single day trippers, one night visitors, cottage renters and cyclists. Visitors from London tend to be two night visitors, cottage renters, cottage owners or cyclists.

Visitors from the remainder of southwestern Ontario came to Pelee Island frequently, and many tended to stay for one or two nights. Many of the visitors from GTA came as single day trippers, cyclists and cottage renters.

Majority of those surveyed came to Pelee Island in groups of two, three and four. One Night Visitors (16%) and those who came to Pelee Island more than 10 Times in the Last Year (20%) did not follow this trend and had a larger percentage of party sizes of one. In addition, Single Day Trippers (15.4%) and Cottage Renters (24%) had a larger percentage of groups greater than 5.

Party Size

As shown below, the average party size is 3.45 people, where the average cyclist had the smallest party size with 2.25 people and the Average Cottage Renter had the largest party size with 5.26 people.

Category of Tourist Travel Party	Average Party Size
Overall	3.45
Average Cyclist	2.25
Average More than 10 Time Visitor during the Last Year	2.8
Average 5-10 Time Visitor during the Last Year	2.88
Average One Night Stay	3.03
Average Cottage, Second Home Owner	3.13
Average Two Night Stay	3.2
Average One Time Visitor during the Last Year	3.57
Average Day Tripper	3.58
Average Cottage Renter	5.26

Duration of Tourist Visit on Pelee Island

The overall average length of stay was 2.71 days. The Average Day Tripper stayed on Pelee Island for the shortest period and the Average Cottage Renter stayed on Pelee Island for the longest period.

Category of Tourist Travel Party	Average Length of Stay
Overall	2.71
Average Day Tripper	1
Average Cyclist	1.5
Average One Night Stay	2
Average On Time Visitor during the Last Year	2.48
Average Two Night Stay	3
Average Cottage, Second Home Owner	3.91

Category of Tourist Travel Party	Average Length of Stay
Average 5-10 Time Visitor during the Last Year	4.35
Average More than 10 Time Visitor during the Last Year	4.35
Average Cottage Renter	5.5

Tourist Trip Frequency to Pelee Island

The majority of visitors coming to Pelee Island are visiting for the first time. The results from the survey show that those who came to Pelee Island 5 or more time during the last year were Cottage, Second Home Owners or came to visit family, friends or came for business.

In the *Windsor, Essex County and Pelee Island Premier Ranked Tourist Destination Evaluation* it was noted that the majority of visitors to the region are same-day (2003). Single day trippers represented 35% of the individuals surveyed; this is somewhat representative of the overall trend for the region.

Planning a Visit to Pelee Island / Tourist Information (Main Reason for Visit)

Overall, 54% of those surveyed sought out tourist information. As would be expected, cottage owners and visitors who have been to Pelee Island five or more times during the last year do not obtain tourist information. The remaining categories of tourist travel party used the internet as their main source of tourist information, while Single Day Trippers also used obtained information at the Ferry Terminal and from a Windsor, Essex, Pelee Island Publication, and Average One Time Visitors during the Last Year obtained tourist information from a Provincial Kiosk.

Visitors provided comments regarding the need for Pelee Island to improve marketing in the areas of communication, better internet capabilities/website and map accuracy. In addition respondents suggested that a central repository of tourist information is needed upon arrive to the island at or near the ferry terminal.

These comments correspond with the *Premier Ranked Tourist Destination Evaluation* findings that the region is not advertised significantly in on-line or printed materials and that tourism operator's on Pelee Island "need to refresh their [marketing] product and more closely cooperate with each other in order to improve the quality of the tourist experience" (2003).

Reason for Visit

Overall, Pleasure/Holiday/Vacation is the main reason why visitors come to Pelee Island. When broken down into categories of tourist travel party, the Cottage Owner/ Second Home, Five to Ten Time Visitor and More than Ten Time Visitor chose Second Home, Cottage Owner as the main reason for visiting Pelee Island.

In addition to the main trends, One Night Visitors (13.8%) and those who came to Pelee Island more than Ten Times in the Last Year (15.8%) had a higher percentage of Business / Work Related responses as their reason for visiting Pelee Island. And under a number of categories, visiting Friends and Family was also listed as a reason for coming to Pelee Island.

Change of Trip Plans based upon Availability of Ferry Passage

27.7% of U.S. citizens had to change their trip plans due to availability of ferry passage and 15.3% of individuals from Canada had to change their trips plans. Capacity on the ferry was noted as the main reason for the change of trip plans.

Travel while on Pelee Island

Overall, 60% of tourists drove, 14% walked and 13% use their bicycle to get around Pelee Island. It was not known how many of the individuals surveyed participated in the Essex County Tours while on Pelee Island.

Accommodation Experience

Overall, there was not a great difference in the percentages between those who paid for accommodation and those who stayed with family/Friends.

Dining/Eating on Pelee Island

Overall, of the 75% of those who ate at a restaurant, pub, inn or bakery, the majority provided high ratings for their dining and eating experience.

Attractions

Overall, 74% of those surveyed visited the beaches and 59% went to the Pelee Island Winery, but had low visitation for a number of attractions. Based on the breakdown of surveys by categories of tourist travel party, the Nature Reserves were more commonly visited by those who had shorter stays on the island or had only been to Pelee Island once during the last year. Pelee Island Art Works was visited by those who stayed two nights, cottage renters, cottage owners, and visitors who came to Pelee Island 5 or more times during the last year. The Marina was visited by cottage renters, cottage owners and those who came to Pelee Island 5 or more times during the last year. The Historic Island Churches had a large number of visitors from the one night stay category and the Stone Road Alvar was visited by a number of cyclists.

Although all the attractions are listed on the Municipal website, the Pelee Island Experience brochure simply identifies tourist attraction and amenities available on the island without providing any description to market them.

Based on the comments received in Section 4.1, Pelee Island has the opportunity to improve visitors beach experience addressing comments related to:

- Lack of beach maintenance
- No public facilities at beaches – need more parking and picnic facilities.

A second area where there is opportunity for improvement is signage. Visitors feel that there is a lack of directional signage and explanatory signage at attractions, while there is also opportunity for road signage to be improved.

Activities

Swimming/relaxing on the beaches was the most popular activity, followed by the:

- Winery tour;
- walking/hiking; and
- bird watching.

Activities with low utilization included:

- Canoeing/Kayaking;
- Fishing;
- Power Boating; and
- Bicycle Rental.

Activities with minimal utilization included:

- Motorized Scooter/Electric Bike Rental;
- Jet Skiing; and
- Row boating.

Single Day Tripper and One and Two Night Visitors had low participation in all of the activities on the island, particularly swimming and relaxing on the beaches, walking/hiking and bird watching. There is the opportunity to improve these percentages because they are the categories of tourist travel parties that are seeking out tourist information before going to Pelee Island.

Cottage renters, cottage and second home owners and those who visited Pelee Island more than 10 times during the last year, participated in the low utilization activities. Therefore, many of the individuals who visit Pelee Island regularly or for longer periods of time are aware of the activities that Pelee Island offers.

Trip Spending

Category of Tourist Travel Party	Spending Per Person Per Day
Overall	\$35.08
Average Cyclist	\$83.49
Average One Time Visitor during the Last Year	\$43.30
Average One Night Stay	\$38.87
Average Two Night Stay	\$36.36
Average Single Day Tripper	\$34.22
Average Cottage Renter	\$27.22
Average 5 to 10 Time Visitor during the Last Year	\$21.60
Average Cottage, Second Home Owner	\$16.80
Average More than 10 Time Visitor during the Last Year	\$12.89

Overall, the average daily expenditure per person was \$35.08. Cyclists (\$83.49) and One Time Visitors during the Last Year (\$43.30) spent the most amount of money per person per day while on Pelee Island. Categories of Tourist Travel Parties who spent the least amount of money per person per day were the Five to 10 Visits during the Last Year (\$21.60), Cottage Owners (\$16.80) and More than 10 Visits during the Last Year (\$12.89).

Overall Pelee Island Experience

The majority of visitors coming to Pelee Island have a positive experience, therefore the municipality of Pelee Island has the opportunity to make improvements to tourism marketing and infrastructure in order to increase the number of visitors who will return to Pelee Island.

5. Preliminary Recommendations

5.1 Tourist Information for Pelee Island

5.1.1 'Experience Pelee Island' Tourist Brochure

Problem: 'Experience Pelee Island' Brochure does not provide detailed information about attractions and activities for tourists'.

The current 'Experience Pelee Island' tourist brochure has four main components:

1. a directory (with address and contact information for Island commercial operations, including:
 - Accommodations
 - Bicycle Rentals
 - Campgrounds
 - Churches – church services
 - Crafts & Gifts
 - Emergency Numbers
 - Fishing Charters
 - Island Organizations
 - Island Realtors
 - Island Services
 - Island Tours
 - Marinas
 - Museums
 - Restaurants
 - Transportation
 - Winery
2. a map of commercial operations and Island attractions;
3. a calendar of special events; and
4. pheasant and rabbit hunt information.

There is no description of Island attractions and activities.

Using what we know about the types of tourists:

- the majority are first time visitors and 35% are single-day visitors;
- Second home, cottage visitors and groups who visited Pelee Island more than 5 times in the last year do not seek out tourist information;
- Short stay visitors are not participating in the activities available on Pelee Island; and
- Cottagers, second home visitors and groups who came more than 5 times are mostly from Ohio and participated in the most activities.

Pelee Island may wish to consider developing two separate brochures, with the first being a new brochure that focuses on the Island's attractions and activities and the second being a modification of the existing brochure that provides information on accommodations, restaurants and services. A larger 11 by 17 format would allow more information to be provided thereby better profiling the Island.

5.1.1.1 *Pelee Island Tourism Brochure #1: Experience Pelee Island's Attractions and Activities*

The purpose of Brochure #1 would be to provide information that entices more tourists to come to Pelee Island. It would provide a brief description of each attraction and activity, provide strategically selected photos to profile some of the attractions, contain a map that identifies their location through numbered cross-referencing, provide a calendar of special events, and provide travelling instructions to the Island. Casual tourists need to be attracted to Pelee Island for more reason than just to see the most southerly point of Canada. This brochure could be organized as follows:

- *Attractions on Pelee Island:*
 - The beaches of Pelee Island (East Park Campground beach, Middle Point beach, Lighthouse Point beach, and West Shore Road beach);
 - The picnic areas of Pelee Island;
 - The nature reserves of Pelee Island (Fish Point Provincial Nature Reserve, Stone Road Alvar, Cooper Road Glacial Grooves, Lighthouse Point Provincial Nature Reserve, Lake Henry);
 - Pelee Island Bird Observatory;
 - The heritage sites of Pelee Island (Pelee Lighthouse, Vin Villa, Historic Churches, Pelee Island Heritage Centre);
 - Pelee Island Winery;
 - Organic Demonstration Farm;
 - West Road Inuksuk; and
 - Crafts and gifts on Pelee Island (Pelee Island Art Works, Treasure Emporium).

- *Activities on Pelee Island:*
 - Biking on Pelee Island (Pelee Island Ecological Tour, Comfortech Bicycle Rental; bicycle tire compressed air locations);
 - Camping on Pelee Island (East Park Municipal Campground, Anchor and Wheel Campground);
 - Island Tours (Nature Tours-Explore Pelee, Pelee Island Tours);
 - Pleasure Boating at Pelee Island (Scudder Marina, boat rentals on Pelee Island);
 - Fishing at Pelee Island (Chante Charters,, Char-Tom Charters, Captain Rick Millette, fishing at Scudder Dock);
 - Hunting on Pelee Island (two fall pheasant hunts, winter pheasant and rabbit hunts).

- *Calendar of Special Events on Pelee Island*
 - Use the same organization as current brochure.

- *Travelling to Pelee Island*
 - Road connections to mainland ferry docks, including a small map;
 - Pelee Island Airport;
 - Scudder Marina; and
 - Canada Customs.

- *For more information:*
 - See www.pelee.org

Some of the necessary information can be drawn from the Pelee Island web site.

5.1.1.2 Pelee Island Tourism Brochure 2: A Guide to Pelee Island's Accommodations, Dining and Services

The purpose of Brochure #2 would be to provide information on the accommodations and dining opportunities and services on Pelee Island. It would provide a brief description of each accommodation and dining opportunity, provide strategically selected photos to profile some of them, contain a map that identifies their location through numbered cross-referencing, and provide travelling instructions to the Island. Potential clients need more information than a telephone book equivalent to make them want to stay and dine on Pelee Island. This brochure could be reorganized as follows:

- *Accommodations on Pelee Island* (from list in current brochure):
 - Bed & Breakfasts;
 - Motels/Inns;
 - Rental Cottages.

- *Dining Opportunities on Pelee Island:*
 - Restaurants and pubs (from list in current brochure);
 - Bakery (Connorlee's);
 - Groceries (Pelee Island Co-op, East Park Municipal Campground)

- *Travelling to Pelee Island* (repeat of information in Brochure #1)
 - Road connections to mainland ferry docks, including a small map;
 - Pelee Island Airport;
 - Scudder Marina;
 - Canada Customs.

- *Emergency Numbers:*
 - Use the same list as current brochure.

- *Services on Pelee Island:*
 - The information regarding the Island Organizations, Island Realtors and most of the Island services is not relevant for tourists. However, if it is seen as necessary, it could be included here.

- *For more information:*
 - See www.pelee.org

5.1.2 Pelee Island Tourism Website

There are a number of websites available for tourists when looking for information on Pelee Island. Many provide pieces of information, but the 'Official' Pelee Island website is maintained by the Municipality of Pelee Island.

5.1.2.1 Municipality of Pelee Island Website

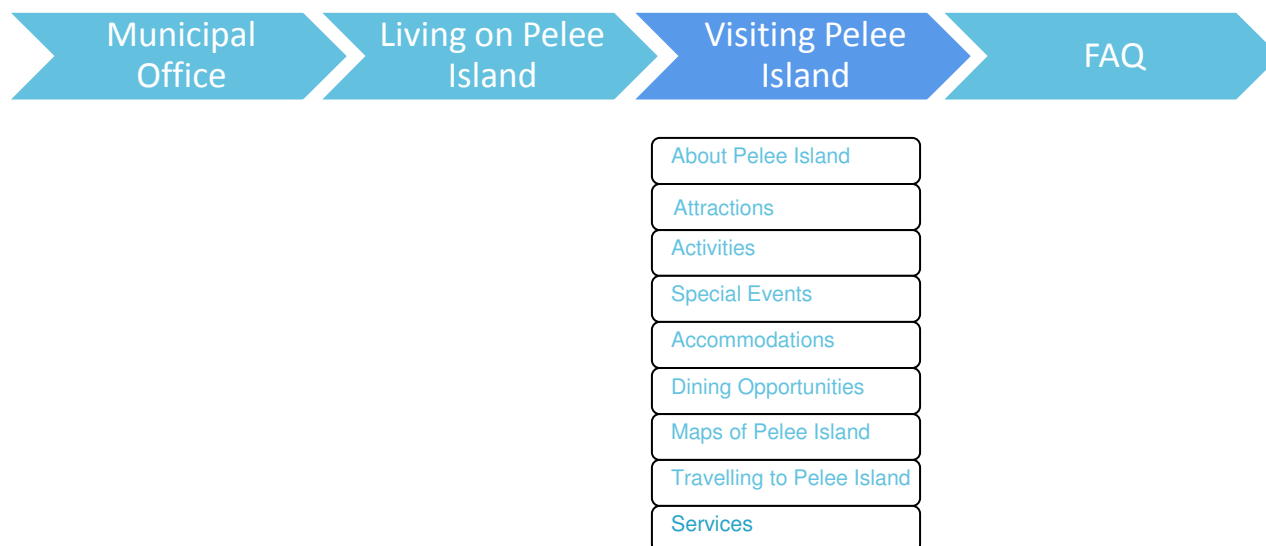
The 'Municipality of Pelee Island' website is the 'official' site for accurate tourist information. It provides some excellent information on municipal services, things to do on the island, accommodations, natural heritage, getting to the island, the municipalities vision, a photo gallery of the island and frequently asked questions.

Problem: Island needs to update the website to make it more 'user friendly'.

The Island may wish to streamline its website headings and provide the following information:

- Municipal Office – municipal departments, municipal staff, committees, council meetings, reports, etc
- Living on Pelee Island – essential services (emergency, health, garbage, recycling), business directory, local events, map
- Visiting Pelee Island
- Frequently Asked Questions

The ‘Visiting Pelee Island’ heading on the website would include side tabs providing information organized as described for the brochures in Sections 5.1.1.1 and 5.1.1.2 above.



Organizing the information on the Pelee Island website in this manner would allow visitors to find the information that they are looking for, very quickly. In addition, the map that is available in the ‘Experience Pelee Island’ brochures should also be on the websites.

5.1.3 On-Island Availability of Tourist Information

A number of visitors commented that there was no central repository of tourist information on the Island.

5.1.3.1 Island Tourist Information Kiosk

Although many tourists review information online in advance of visiting the island, many commented in the survey that the Island needs a kiosk or stand at the ferry terminal on the island that provides last minute tourism information.

A small brochure kiosk or booth near the exit/entrance of the Island ferry terminal possibly with a seasonal attendant would be an asset to island because it would provide the island with the opportunity to assist with last minute trip planning.

5.1.4 Off-Island Availability of Tourist Information

In addition the tourist material available, a number of comments were received with respect to the availability of tourist information. A number of visitors commented that there was little tourist information beyond the ‘Experience Pelee Island’ brochure on the Island and at the ferry terminal.

5.1.4.1 Tourist Information on Ferry

All tourist brochures (municipality and private) for attractions, activities, accommodation and restaurants needs to be made available on the ferry. A small stand containing brochures for island attractions, activities, accommodations, etc, should be placed in the sitting area. This is a common practice on ferries in other jurisdictions.

5.1.4.2 Tourism Windsor, Essex, Pelee Island

The Island needs to make sure that 'Tourism Windsor, Essex, Pelee Island' has the most up to date information on accommodations, attractions and services. Although their website contains the majority of accommodations available on the island and it does not provide detailed information on Island attractions and activities. Pelee Island should ensure that Tourism, Windsor, Essex, Pelee Island has the most up to date tourist information.

5.2 Tourist Experience on Pelee Island

In the *Pelee Island: A Community of Hope* Report (University of Guelph, 2009) it was noted that the Island had a lack of orientation signage and very little signage at the ferry terminal to welcome visitors. Their recommendations included the installation "of consistent, high quality and attractive directional signage to landmarks throughout the island". Comments received during the survey were consistent with these recommendations.

Pelee Island may wish to consider creating a theme for tourists similar to the 'provincial park experience', where there is uniform directional signage that reflects the natural heritage of the island and the two Provincial Nature Reserves.

5.2.1 Attraction Signage

5.2.1.1 Directional Signage

Pelee Island may wish to consider providing directional signs at the ferry dock exit and at key intersections.

As tourists exit the ferry dock terminal at the West Dock they should encounter a sign welcoming tourists/visitors to the island. This sign should also have information directing tourists/visitors to the tourism information centre/ kiosk/ board, so that tourists can easily locate any last minute additional tourist information.



Sample of Directional Signage

Key road intersections on the Island could have a sign with arrows directing tourists towards attractions, accommodations, dining opportunities, and public washrooms that provide approximate distances. Providing directional signage for washrooms will partially address the comments received about the lack of public facilities.

5.2.1.2 Attraction Signage

To provide continuity with the directional wayfinding signage around the island, Pelee Island may wish to consider "banner" signage at the road entrance to each attraction.

Pelee Island may also want to consider developing explanatory signs for the Stone Road Alvar Conservation Area and Shaughnessy Cohen Memorial Savanna, mimicking the provincial interpretative panels that have or will be installed at the Lighthouse Point Nature Reserve and Fish Point Nature Reserve, and coordinating them with signage at interpretive site identified on the Pelee Island Ecological Trail System brochure.

It is noted in the Fish Point and Lighthouse Point Park Management Plan (2005), that the above “sites attract significant numbers of birders, photographers, tourists, ecologists, and researchers”. They are key features for eco-tourism on the Pelee Island and should be made more visible to visitors.

5.2.2 Beach Amenities

5.2.2.1 Public Facilities

The island has four (4) public beaches, three on the west side and one on the east side. Only the beaches located near the East Park Municipal Campground has a public washroom. None of the public beaches have change facilities for day users and in addition to parking on the shoulder of the road, only the public beaches near the Lighthouse Point Nature Reserve and the East Park Municipal campground have a parking lot, and many users may not recognize the East Park Beach parking lot because it looks like a lawn area that should not be driven on.

The Island may wish to consider building a public washroom and change facility at more of the beaches to provide day users or visitors who have checked out of their Island accommodation. If this is not feasible, signs should be provided at each beach directing users to the public washroom locations.

5.2.2.2 Public Space/Picnic Areas

There are limited picnic areas or picnic tables for families outside of the winery and the East Park Municipal Campground. The island may wish to consider designating picnic areas for day users (e.g. at each public beach) with picnic tables, etc or providing day users with the opportunity to use the picnic tables at the municipal campground.

5.2.2.3 Beach Maintenance

Problem: Dead fish on the beach, bugs are bad.

A number of visitors who used the public beaches commented that there was garbage and dead fish along the sand. Pelee Island may wish to improve beach maintenance by daily cleanup (e.g. some municipalities use a tractor and drag harrows) either through volunteer group or by hiring a summer student.